



# LAF Productions, Inc.

“Bringing LAFter Back to Business”™

## Project Engagement Questionnaire

- I. Business Strategy
  - a. Can you provide current business, marketing and marketing communications plan(s)?
- II. Revenue Goals
  - a. What are your overall goals for next year (Qtr over Qtr growth)?
  - b. What are your business revenue expectations, based on your proposed budget investments?
- III. Budget
  - a. What is projected promotions budget, including all anticipated agency fees, production costs (e.g., printing, postage, film, etc.)?
  - b. How was this budget determined?
  - c. What was the promotional expenditure for last year (approximately) for each of the possible lead generation tools (e.g., advertising, direct mail (DM), events, PR, etc.)?
- IV. Objectives
  - a. Please rank in order of importance specific marketing objectives for the next year (i.e., increase brand awareness, improve brand perception, lead generation, etc.).
  - b. Please address overall quantitative and qualitative objectives, as well as, individual product/marketing goals.
- V. Communications Messaging
  - a. Please describe, in one sentence, the latest thinking of your overarching, most-effective and defensible position statement (*please note as to whether all decision makers have agreed on this*).
  - b. How would you want your end user to best categorize what kind of business you are?
  - c. What is the single-most, important benefit your solution provide(s)?
- VI. MarCom Metrics
  - a. Please provide detailed Return On Investment (ROI) research (from a \$ cost conversion by tactic and integrated model) that outlines how past marketing communications have achieved Key Business Indicators (KBIs) or Key Performance Indicators (KPIs).
  - b. Please provide research that tracks current brand awareness (both aided and un-aided), perception, etc.

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VII. Competitive Positioning

- a. Who are your competitors (rank in order of importance)?
- b. How is each major competitor positioning itself in your market?
- c. How effective do you feel each competitor's positioning is? Explain.
- d. How effective do you feel each competitor's offerings are? Explain.
- e. What is your strategic, competitive position? Is it different, unique, and defensible versus the competition?
- f. Has this position changed recently? If so, how and why?
- g. Is your current position getting stronger or weaker? If so, why?
- h. Are there any internal or external factors that might or should change the competitive position? Please describe.

VIII. Product Offerings/Competition:

- a. What are you, along with our company, actually selling/promoting?
- b. What are the major features and benefits of such (*please answer from a customer point-of-view and in relation to your competition*)?
- c. Which features and benefits appeal to which markets?
- d. What are the capabilities of the competition from least capable to most capable?
- e. In what way(s) is the offering more effective?
- f. In what way(s) is the competitor's brand more innovative?
- g. In what way(s) is your brand(s) more innovative?

IX. Sales

- a. What is the cost of customer acquisition broken out by sales efforts, marketing efforts, etc.? Is there a variance between current customers versus non-existing customer?
- b. What is the average sales cycle of both, existing customers and new prospects?
- c. How many direct sales force employees do you currently have employed? Is there any growth or contraction trends forecasted? How is the sales force structured (i.e. region, by account, by product)?
- d. What is the lifetime value of an account?
- e. What is the expected overall revenue increase from the current base (current customer, new customer, direct vs. channel)?

- f. What is the average deal size? How is that split between software licensing and services?
- g. Do you have any web reports that highlight the number of hits and from which referral or domain location over the course of the past 12 months (*please overlay that with any outbound activities that may have affected the volume variance*)?
- h. Do you know the ratio % of an appointment's lead-to-close ratio?

X. Marketing Tactics

- a. What have been the most and least effective promotional activities for the competitor's brand in the past? Explain.
- b. What have been the most and least effective promotional activities for your brand(s) in the past? Explain.

1. Direct Marketing

- a. What is the cost per lead (if current customer purchases more, as well as, by new prospect)? What factors are considered by cost per lead (i.e. sales calls, telemarketing, online efforts, etc.)?
- b. How are those tactical instruments of outbound communication currently integrated in effort?
- c. Typically, over the course of a year, how many times are your current prospects contacted? What is the marketing cost for such contact, and by what means?
- d. Please provide a report that indicates the source of inquiry (i.e. cold call, email promotion, offline DM, seminars, telemarketing, etc.). If there was an integrated model that may use more than one instrument noted before, please deliver the number of prospect contacts needed to help close the deal (i.e. 8X telemarketing, 3X email, 1X DM to one named prospect before it is categorized as a lead). Please describe the lead qualification criteria/profile for A/B level leads.
- e. Do you currently track how many level Bs turn into As?

- f. Also, what is the average length of sales cycle of an A or B lead to close?
- g. What is the single most important offer that converts the prospect into a customer?

## 2. Database Questions

- a. Please describe the process and structure of managing your current corporate and field database – everything from Customer Relations Models (CRMs). What technology are you currently using? How do you organize, grow, collect, and groom (merge and purge) the data? What metrics are in place to scrub it?
- b. How is it currently segmented? What plans are currently in place to continuously update contacts – for instance, list acquisition (if so how, where and why)? How are those new names being populated throughout your company?
- c. Please describe your current database marketing process (not direct marketing)?
- d. How much money is currently being invested in online marketing and what have been Cost-Per-Click (CPC) and Click-Through Rate (CTR) from these efforts? *(Please break down by number of total contacts. We need this, like the other information, to properly propose how much effort it will take to manage a single data warehouse of all of your customers, prospects and sourced lists).*

## 3. Advertising

- a. Can you provide the following:
  - i. Current advertising creative brief.
  - ii. Committed ad rates per publication for next year's media schedule.
  - iii. Competitive ad spending analysis and placement.
  - iv. Any past historical lead analysis from advertisements.

4. Search Engine Marketing
  - a. Please describe your online Search Engine Optimization (SEO) plan (what, where, how – including paid for click, key word search, outlets, etc.).
5. Tradeshows
  - a. What do you consider your MUST ATTEND shows for your currently identified target?
  - b. How do you currently make customers and prospects aware of your attendance?
  - c. What do you expect in terms of A-level leads and appointments anticipated revenue for this effort? In fact, please break down total number of inquiries to close ratio.
  - d. What merchandising have you negotiated with such commitments?
  - e. Are you a lead sponsor for any of these?
  - f. Are you planning on any major press announcements or analyst tours during these events? Please explain.
6. Public Relations
  - a. What new services, events, etc. will you introduce over the next 3 – 6 months and year?
  - b. Which of the following, if any, is in your pipeline?
    - i. Editorial Calendar; Sponsorships/Donations; Partnerships; Personnel Announcements; Issues and Advocates; Events; Conferences; Webinars; Milestones; and/or Speaking Engagements
7. Other