



## New Client Marketing **BRANDING** Survey

Date: \_\_\_\_\_

Company Name: \_\_\_\_\_

Contact: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_

### **1. Company Overview**

What business or industry are you in?

---

---

---

---

How long have you been in a business?

---

How many people work for your company? \_\_\_\_\_

Describe your business in one sentence. (i.e. "A Family Business with Family Values")

---

---

What is the story behind the founding of your company?

---

---

---

---

---

---

---

---

*Bequia Marketing*

Choose the most important attribute that your company delivers to its customers:

- Financial Value – Your dependability brings your customers a quality product at a low price.
- Innovative Products – You are always bringing your customers the very newest products or ideas.
- Customized Relationships – You can tailor your services to meet the needs of your customers.

List, in order of importance, the attributes of your company that you would like to emphasize.

---

---

---

---

---

---

---

---

---

---

What do you think the industry’s impression of your company is?

---

---

---

---

---

---

---

---

---

---

What is the most common misconception about your company?

---

---

---

---

---

---

---

---

---

---

What are the company's major goals in the immediate future?

---

---

---

---

---

---

---

---

**2. Industry Overview**

What is the North American Standard Industry Classification (NASIC) Code for your business?

---

What is the Standard Industry Classification (SIC) Code for your business?

---

State any technological trends - shifting trends, signs of obsolescence.

---

---

---

---

---

---

---

---

What is the economic state of your industry? Recession? Recovery? Prosperity?

---

---

---

---

---

---

---

List all trade and industry publications that relate to your business.

---

---

---

---

---

---

---

---

---

---

**3. Products / Service**

What products / services do you offer?

---

---

---

---

---

---

---

---

---

---

Which products / services are most important to your company and why?

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

*Bequia Marketing*

How are these products / services unique to the industry?

What are the features you are most excited about?

---

---

---

---

---

---

---

---

What would you like to change or improve about the image of your current products / services? Why?

---

---

---

---

---

---

---

---

What new products / services will be offered in the immediate future? Distant future?

---

---

---

---

---

---

---

---

What perceived value do these new products offer; how will your customers react?

---

---

---

---

---

---

---

---

## *Bequia Marketing*

How are your products distributed?  
(i.e. retail store, catalogues, internet, trade shows, door-to-door, etc. )

---

---

---

---

---

---

---

---

---

---

What is the most compelling reason that someone would be motivated to sell your products / services over someone else's?

---

---

---

---

---

---

---

---

---

---

### **4. Competition**

List three competitors, in order of most threatening first, and compare their strengths and weakness to your company in the following areas:

- Target Market & Market Share
- Products / Services Offered
- Quality of Product vs. Pricing
- Corporate Identity & Consumer Awareness
- Current Advertising & Promotion Efforts (Media Mix)

Competitor A: \_\_\_\_\_ vs. my company:

---

---

---

---

---

---

Competitor B: \_\_\_\_\_ vs. my company:

---

---

---

---

Competitor C: \_\_\_\_\_ vs. my company:

---

---

---

---

**5. Consumer & Marketing Analysis**

Who is your ideal target consumer? (Demographics - characteristics of human populations and population segment;  
Geographics - physical/geographic location of the population being studied; Psychographics - attitudes, values, lifestyles, and opinions. )

---

---

---

---

What are they looking for in a product / service?

---

---

---

---

Why do they want your product / service?

---

---

---

---



*Bequia Marketing*

Describe the consumer that you would like to do business with that you are not reaching today.

---

---

---

---

---

---

---

---

Is your ideal customer knowledgeable about your products / services?

---

---

---

---

Does your ideal customer have any known preferences or negatives to overcome?

---

---

---

---

Why do you feel these are profitable target consumers?

---

---

---

---

List all industry publications that relate to your target market / consumer.

---

---

---

---

---

**6. Current Marketing**

How are you currently attracting new customers?

---

---

---

---

Do you currently have corporate identity standards in place?  
If yes, how closely are these standards followed company-wide?

---

---

---

---

Do you have a formal internal process in place to evaluate creative solutions or do you rely on personal taste and experience? Focus Groups? Please explain how decisions are made.

---

---

---

---

What do you like most about your current marketing materials, corporate identity, or advertising campaign?

---

---

---

---

What do you wish you could change?

---

---

---

---

*Bequia Marketing*

Do you have a website? What role does it play in your promotional efforts?

---

---

---

---

Rank the importance of the following in your marketing efforts:

(1 being the most important and 7 being the least)

- Print Collateral
- Direct Mail Campaigns
- Advertising Exposure
- Website
- Trade or Consumer Shows
- Point-of-Purchase Displays
- Package Design
- Management and Product Seminars/Workshops
- Theme product and Promotional Events
- Corporate Identity
- Branding Strategy
- Other (Please Specify) \_\_\_\_\_

**7. The Working Relationship**

What are the most important qualities you consider when selecting a creative services house?

---

---

---

---

---

---

---

## *Bequia Marketing*

Which of the following best describes your work-style?  
(Select the statement that best applies)

- I'm very hands-off in marketing material development.  
I rely on my creative firm to provide leadership and expertise to implement my marketing strategy.
- I prefer a partnership approach – blending the leadership and expertise of my creative firm with my own – in developing an appropriate creative strategy.
- I'm very hand-on with all aspects of creative development.  
I rely on my creative firm for input and expertise, but I will provide very detailed direction and strong opinions and preferences.

We thank you for taking the time to complete this marketing survey.

*Gerry*

Gerry Wolkowski- President [gerry@bequiamarketing.com](mailto:gerry@bequiamarketing.com)

*Bequia Marketing* 25 Charles Tupper Dr. Toronto, ON. M1C 2A8 416. 284. 2335

*Bequia Marketing*

25 Charles Tupper Drive  
Toronto, ON M1C 2A8  
T: (416) 284-2335

[www.bequiamarketing.com](http://www.bequiamarketing.com)

46 reasons to exhibit in a trade show, exposition, conference, a corporate event.  
...and after the event you will be able to add even more.

*Check the ones that apply to you*

- |   |   |
|---|---|
| <input type="checkbox"/> Demonstrate new products or services                 | <input type="checkbox"/> Educate sales force                                  |
| <input type="checkbox"/> Meet buyer face to face                              | <input type="checkbox"/> Educate dealers                                      |
| <input type="checkbox"/> Interact with audience preselected by interest       | <input type="checkbox"/> Relate to competition                                |
| <input type="checkbox"/> Appeal to special customer interests                 | <input type="checkbox"/> Conduct market research                              |
| <input type="checkbox"/> See buyers not usually accessible to sales personnel | <input type="checkbox"/> Recruit personnel                                    |
| <input type="checkbox"/> Uncover unknown buying influences                    | <input type="checkbox"/> Attract new representation                           |
| <input type="checkbox"/> Be compared with other suppliers                     | <input type="checkbox"/> Highlight new products or services to media          |
| <input type="checkbox"/> Showcase technical support personnel                 | <input type="checkbox"/> Use as three-dimensional sales opportunity           |
| <input type="checkbox"/> Shorten buying process                               | <input type="checkbox"/> Develop action-oriented media                        |
| <input type="checkbox"/> Make immediate sales                                 | <input type="checkbox"/> Create customer lists                                |
| <input type="checkbox"/> Project image  | <input type="checkbox"/> Show audio visuals or products or services           |
| <input type="checkbox"/> Create image   | <input type="checkbox"/> Support wholesalers                                  |
| <input type="checkbox"/> Continue customer contact                            | <input type="checkbox"/> Reach customers at low cost per call                 |
| <input type="checkbox"/> Meet potential clients                               | <input type="checkbox"/> See top management personnel                         |
| <input type="checkbox"/> Qualify buyers                                       | <input type="checkbox"/> Meet power buyers                                    |
| <input type="checkbox"/> Introduce new products or services                   | <input type="checkbox"/> Target market by type of attendance                  |
| <input type="checkbox"/> Demonstrate nonportable equipment                    | <input type="checkbox"/> Target market by function of attendance              |
| <input type="checkbox"/> Understand customer problems                         | <input type="checkbox"/> Develop leads for dealers                            |
| <input type="checkbox"/> Solve customer problems                              | <input type="checkbox"/> Develop leads for wholesalers                        |
| <input type="checkbox"/> Identify new product or service applications         | <input type="checkbox"/> Develop leads for representatives                    |
| <input type="checkbox"/> Showcase projected new product or services           | <input type="checkbox"/> Reach known prospects not being contacted            |
| <input type="checkbox"/> Obtain product or service feedback                   | <input type="checkbox"/> Reach unknown prospects not being contacted          |
| <input type="checkbox"/> Build sales force morale                             | <input type="checkbox"/> Reach existing customers who need personal attention |