



MARKETING CONSULTANCY

Identifying effective solutions for all your marketing needs

**FACT FINDING SHEET**

**Client Name:** \_\_\_\_\_

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

**A bit about you**

**How did you get started doing what you do?**

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**What do you enjoy the most about what you do?**

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**What big changes have you seen in your business/industry since you started?**

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**What trends do you see happening in your business/industry?**

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## **Background**

**What does the company do?**

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**Who are your customers?** (currently)

*(or if you are a new business), who are your ideal/target prospects and where are they based location wise?*

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**Who is an ideal person/person to introduce to you?**

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**What would you say is unique/special about your company?**

**What is the USP?**

*Be specific eg certain qualifications or specific products stocked, specific part of your service offered*

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**Do you keep a customer database?**

*Is the data up to date?*

*What data is kept?*

*Approx. number of records?*

**If you do not keep a database, do you have any plans on how to build a database/where will you get data from?**

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**Who are your competitors?**


**Marketing**

**Do you have a Marketing team in place or an agency in place?**

**Are you looking for quotes from other agencies?**

**Why has the need been identified now?**

*Eg start up, plans to grow etc*

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**What Marketing have you carried out previously or what do you have set up so far?**

*Do you have a current business plan or marketing plan in place?*

*Branding eg a logo and/or strapline*

*Direct mail eg flyers, letters*

*Email marketing eg set up a cloud account, newsletters*

*Advertising eg online or in print*

*Website/SEO/PPC eg domain confirmed, website set up, keyword research*

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*PR eg interviews, articles, press releases*

*Exhibitions/Events eg stand space booked, speaking opportunities*

*Networking eg locally events to meet prospects*

*Social Networking eg Facebook, Instagram, Twitter, LinkedIn*

*Sponsorship/CSR?*

*Content plan established?*

**What are your objectives for the Marketing?**

**What would you be looking to achieve?**

*Be as specific as possible eg xx number of bookings per week or to grow by xx%*

**What is your budget?**

*Per month or in total?*

**What are your timelines?**

*When are you looking for any marketing activity to start? Are you looking for retainer support, one off campaign work?*

**Are you the main decision maker?**

**Is anyone else involved in the decision?**

*Eg staff, sponsor, venture capitalist?*

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