



CLIENT PROFILE

Contact(s) Name

Title

Email

Phone

Company Overview

Industries

Product and/or Service Offering

Market Segmentation

Brand Awareness/Positioning in Marketplace

Pain Points – What has motivated you to engage with us?



CLIENT PROFILE

SALES/REVENUE

Current Annual Sales

Past Year/Over Year Growth

5 Year Goals

Client Value Breakdown

	# of Companies	% of Business	\$ Value	# Goal to Acquire Next Year
Big Fish	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Average Size	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Guppy	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Greatest Source of Revenue Sweet Spot

Greatest Opportunity for Growth

BRAND STORY

Philosophically, why do you do what you do?

Meaning of Logo

Tagline

Elevator Pitch

Competitive Advantages/Key Differentiators
(corporate, per decision maker, per product/market)



CLIENT PROFILE

CLIENT PROFILE - WHO ARE THEY?

What types of companies
do you target?

What departments/titles?

What are the barriers you face?

How do you generally communicate with them?

SALES TEAM

Executives/Inside/Outside/Regional/National/Global?

Sales Process

Competition - Who are they?

Current Marketing Efforts (department, strategy/successes, wishlist/vision)

Goals - What are your top 3 expectations
from a marketing plan?

Budget (current marketing budget and
expected marketing investment)