



marketing interest assessment

Name: _____

Office: _____

Please rate according to your degree of interest in doing or participating in the following activities:

	<u>High</u>	<u>Moderate</u>	<u>Low</u>	<u>None</u>	
Involvement in community activities (civic)	5	4	3	2	1 0
Involvement in trade organizations	5	4	3	2	1 0
Involvement in charitable organizations	5	4	3	2	1 0
Speaking in public (small groups < 10)	5	4	3	2	1 0
Speaking in public (large groups > 10)	5	4	3	2	1 0
Speaking at firm sponsored seminars	5	4	3	2	1 0
Speaking at firm in-house training seminars	5	4	3	2	1 0
Membership in social clubs	5	4	3	2	1 0



marketing interest assessment (cont.)

Writing articles for an internal newsletter	5	4	3	2	1	0
Writing technical articles for newsletter/ newspaper or other publications	5	4	3	2	1	0
Contacting clients when you are not actively working on them	5	4	3	2	1	0
Attending extra-curricular activity with a referral source	5	4	3	2	1	0
Attending extra-curricular activity with a client	5	4	3	2	1	0
Attending Chamber of Commerce meetings or socials	5	4	3	2	1	0
Developing and writing proposal formats	5	4	3	2	1	0
Reviewing proposals/presentations	5	4	3	2	1	0
Taking part in presentations	5	4	3	2	1	0
Taking clients to lunch	5	4	3	2	1	0
Taking referral sources to lunch	5	4	3	2	1	0



marketing interest assessment (cont.)

Cold-calling on prospective clients 5 4 3 2 1 0

Assist in developing client/industry
target lists for market territory 5 4 3 2 1 0

Other activities, please state:

Please state any current involvement in the following activities:

Involvement in community civic activities:

Involvement in trade organizations:



marketing interest assessment (cont.)

Public speaking engagements for past year:

Involvement in social clubs:



marketing interest assessment (cont.)

Referral Source (Please list top ten names and their industry or source – Example: Attorney, Broker, Client, Business Associate, Friend, etc....):

Name	Industry or Source
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____
6. _____	_____
7. _____	_____
8. _____	_____
9. _____	_____
10. _____	_____