



personal marketing questionnaire

Learn your marketing strengths and weaknesses by rating your answers on a scale of 1 – 10, with 0 representing a strong negative (no or never), 5 representing neutral (sometimes), and 10 representing a strong positive (always).

1. Knowing Your Client Base

- A. I know which of my clients are satisfied with my services and those that are not.
- B. I know the top five industries my firm serves.
- C. I often ask clients if they are happy with our services.
- D. It doesn't bother me to ask an existing for a referral.
- E. I know which industries are growing and which are softening in my market.
- F. I try to stay abreast of trends in the industries of my major clients.
- G. I ask my clients what trends are happening in their industry that may impact their business.

KNOWING YOUR CLIENT BASE SCORE: _____

2. Lead Generation

- A. While driving around in my car or reading the local newspaper, I notice the names of companies that might make good clients.
- B. I have a good knowledge of my firm's client base so when speaking with other business people I can recognize opportunities for introductions.
- C. I have ample opportunities to meet different business people.
- D. When I am around neighbors, friends, and other social contacts, I am always looking and listening for opportunities.
- E. I have established a network of referrals.
- F. I make it a point to meet with referrals and other networks on a regular basis.
- G. I regularly attend functions where other business people meet.
- H. I have a targeted goal when I meet someone for lunch or another meeting.
- I. It does not bother me to speak with someone I don't know.
- J. I research a prospect before I meet with them. Therefore, I usually know a great deal about the company and the person I will meet prior to the meeting.
- K. I add prospects to the firm's mailing list.
- L. I distribute information packets to all prospects.

LEAD GENERATION SCORE: _____



personal marketing questionnaire (cont.)

3. Sales

- A. On an initial business meeting with a prospect, I use the first part of the meeting to gather information on the prospect's situation rather than discussing firm's credentials and services.
- B. I know the difference between open-ended questions and close-ended questions and use both to collect information, guide the discussion and uncover "hot issues."
- C. I do an effective job of listening carefully and watching for needs.
- D. I try to discern the prospect's personality type so I may appropriately respond.
- E. I know the difference between a feature and a benefit.
- F. I have a good understanding of the firm's services outside my area of practice.
- G. When I encounter objections, I know how to handle them objectively.
- H. I generally know why a prospect is considering a switch or buying our services.
- I. I obtain a commitment to proceed to the next phase of the business.
- J. I make sure I am meeting with a decision maker, or I find out who the decision maker is and work towards meeting him/her.
- K. I am comfortable speaking to a group (7 or more) of decision makers (such as a board of directors).
- L. I introduce other team members to prospects that may need another service other than my area of practice.
- M. I don't give up after one prospect meeting. I understand it usually takes about three meetings to build confidence.

SALES SCORE: _____

4. Referral Building

- A. I know the difference between a referral and a prospect.
- B. I understand that in most cases referral sources expect me to help them in return and I do it.
- C. My referral sources are in several different fields.
- D. I know that in many cases referral sources may not produce results for several months or even years.
- E. I always send a referral source a thank you note or make a personal telephone call when I receive a lead from them.
- F. I follow-up by letting my referral source know the results of my meeting with the leads they provided.
- G. I stay in touch with staff members that have moved to industry.

REFERRAL BUILDING SCORE: _____



personal marketing questionnaire (cont.)

5. Follow Up

- A. After proposing to a company, I always follow up with a telephone call or a letter in seven days.
- B. I continue to follow up until I am told a result. If my firm is not chosen, I find out why and which firm was chosen and why.
- C. If a prospect needs additional information, I provide it as soon as possible. If the information cannot be uncovered immediately, I contact the prospect and let him/her know when it will be available.
- D. After meeting a prospect (whether at an association meeting or from a lead), I contact that person to begin building a relationship.
- E. I review my referral sources regularly to see if they have sent any leads. If not, I make a point to meet with them.
- F. I track why prospects do not become clients.
- G. I stay in touch with clients that have left the firm.
- H. If I have some trouble meeting a prospect a second time, I use my referral sources for additional help, or I find someone that has a contact at the company that can help.

FOLLOW UP SCORE: ____

Scoring Results

Knowing Your Current Client Base

- 70-50 Top of the bunch! You are headed in the right direction.
- 49-35 Ahead of many. Might work on learning more about clients.
- 34-20 In a danger area. The first rule of marketing is knowing your clients.
- 20-0 Need help. Take some time to speak with your clients.

Lead Generation

- 120-80 Go to the head of the class. This is the most difficult area, but you excel!
- 79-60 You are learning fast. Take the lead by working on areas that you might fear.
- 59-30 Need some guidance, but you are obviously interested in generating leads.
- 29-0 Need help. The future calls for you to generate leads. To be successful you need guidance in this area.



personal marketing questionnaire (cont.)

Sales

- 130-90 You pass with flying colors. Successful sales lead to bigger bottom lines.
- 89-70 You definitely like selling, just need a little direction.
- 69-40 You'd rather not sell, but feel it is necessary. Watch others that are successful and see if you can learn from them.
- 39-0 So selling isn't really your area? Either learn more about selling and how you can play a role, or lean on others to do the selling for you.

Referral Building

- 70-50 You know how referrals can help. You obviously believe referrals are the way to go.
- 49-35 You probably know you should work on referrals but have a consistency problem. Keep at it.
- 34-20 Having trouble meeting people. Consider ways to overcome this.
- 19-0 You are missing an excellent source of leads. Take the initiative.

Follow Up

- 80-60 You know the importance of following up. It is essential to being successful.
- 59-40 You are taking the lead. Remember that it can't be a one-time occurrence. Follow up continually.
- 39-20 You know your weak areas, now work on them.
- 19-0 Need help. You could be missing opportunities that are in the palm of your hand.

Surprised at your results? Or did you know how you would score? Use this questionnaire as a development tool to enhance and define the areas where you may need help. If an entire firm completes the questionnaire, those individuals with high scores in certain areas can help others with low scores in the same areas. As well, overall scores should provide the roadmap for the type of marketing training your firm members may need.