Marketing and Sales Assessment

BACKGROUND: It's helpful for you to understand how you view your Marketing and Sales activity and your involvement in it. These questions are to stimulate your thinking. It's helpful to answer each of these questions as clearly and thoughtfully as possible, although a short answer – a couple of words or sentences - is usually enough.

Your Services

1. What do you sell?
    - Describe the core products or services your business offers.

2. Who do you sell to?
    - Identify your primary target customer segments.

3. Who are your top 3 competitors?
    - Note key differences in the offerings.

4. Why do people buy from you, compared to your competition?
    - Outline the unique value propositions that set your business apart.

5. What is your ideal customer worth to your business during the lifetime they're with you?
    - Estimate the lifetime value of an ideal customer.

Your Target Market

6. Which are the top 3 industry sectors you operate in?

7. Describe the type of business & size of your ideal customer:

8. Which decision maker job titles do you most need to connect with?

9. Describe any influencers who could help you access your ideal customers:

10. Which countries & territories do you operate in?
    - Specify your geographical market reach.

11. Do you need to target new/existing customers or both?

Sales Strategy

12. How do you differentiate your sales approach from your competitors?

13. Which sales strategies have yielded the highest ROI in the past year?

14. Can you identify any gaps in your current sales strategy that directly impact sales performance?

Sales Operations

15. How do you track and manage leads throughout the sales funnel?

16. What is the average time from initial contact to close for new customers?

17. Describe how customer feedback is integrated into sales strategies.

Customer Relationship Management

18. Rate your business's ability to retain customers on a scale from 1-10.

19. How personalised are your customer interactions? Provide examples.

20. Discuss any CRM tools' effectiveness in supporting your sales process.

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Marketing Strategy

21. How do you evaluate the effectiveness of your marketing channels?

22. Describe how market research informs your marketing strategies.

23. How often do you refine your target audience or personas based on market trends or feedback?

Digital Presence

24. Describe how your website and social media platforms are optimised for engagement and conversion.

25. How do you use content marketing to build authority and trust in your industry?

26. Provide examples of how you've successfully used digital marketing to achieve a specific sales goal.



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NEW WAY GROWTH

Operational Effectiveness
In relation to your business, please rate each of the following on a scale of 1 - 5 (where 1 = poor & 5 = strong). Where you are uncertain of an answer, please choose 1.

	1	2	3	4	5	What score is required
You have a written down weekly/monthly sales & marketing plan	◯	◯	◯	◯	◯	_____
You meet with your team weekly/monthly to review your sales & marketing plan	◯	◯	◯	◯	◯	_____
You / your team use LinkedIn / social media to generate new business leads	◯	◯	◯	◯	◯	_____
You / your team use LinkedIn / social media to maintain client relationships	◯	◯	◯	◯	◯	_____
You / your team use LinkedIn / social media to consistently maintain your brand awareness	◯	◯	◯	◯	◯	_____
You regularly send email marketing campaigns to your online database	◯	◯	◯	◯	◯	_____
You regularly send hard copy marketing mailings to prospects and clients	◯	◯	◯	◯	◯	_____
Telemarketing / sales is part of your business development approach	◯	◯	◯	◯	◯	_____
You have a fully segmented customer database management system (CRM) for marketing purposes	◯	◯	◯	◯	◯	_____
You perform a daily/weekly check of your website visitor traffic analytics	◯	◯	◯	◯	◯	_____

Evaluation and Recommendations

- Consolidate responses to paint a detailed picture of your sales and marketing capabilities, competitive positioning, and target market understanding.
- Identify clear strengths such as strong product differentiation or effective use of digital marketing, as well as areas requiring attention like enhanced targeting or better sales/marketing alignment.
- Formulate recommendations that address specific findings. For areas where a "1" was rated, consider suggesting training, technology improvements, or strategic realignments.
- Propose actionable strategies to leverage strengths better, such as amplifying successful digital marketing practices or refining the value proposition to outmatch competitors more effectively.

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