



~~USA~~  
Fact Finder



**Part 1 – The Basics**

Client Name & Mailing Address: \_\_\_\_\_

Shipping Address \_\_\_\_\_

\_\_\_\_\_

Phone Number \_\_\_\_\_ Toll Free Phone Number: \_\_\_\_\_

Fax Number: \_\_\_\_\_ Web Site Address: \_\_\_\_\_

Email Address(es) \_\_\_\_\_

Who is our primary contact? \_\_\_\_\_ Title \_\_\_\_\_

Who are our other contacts? \_\_\_\_\_ Titles \_\_\_\_\_

When was your company founded? \_\_\_\_\_

By whom? \_\_\_\_\_

Do you hold any trademarks, service marks, trade names or copyrights? \_\_\_\_\_

\_\_\_\_\_

Do you have electronic files of your logo(s) Yes \_\_\_ No \_\_\_

What are your corporate colors? \_\_\_\_\_

Do you have a Graphic Standards Manual? Yes \_\_\_ No \_\_\_

What is your slogan or positioning statement? \_\_\_\_\_

\_\_\_\_\_

Do you have a copy of your Mission Statement Yes \_\_\_ No \_\_\_

What is your basic organizational structure (e.g., divisions, subsidiaries)? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

What are your key facilities (e.g., plants, campuses, offices, branches, warehouses, affiliates)? \_\_\_\_\_

\_\_\_\_\_



**Part 2 – Your Key Products/Services**

Product/Service: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Unique Features: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Benefits: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Customer Profile: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What is the Product/Service Life Cycle? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What are the industry's growth projections? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Current Year's Sales: \$ \_\_\_\_\_ Last Year's Sales: \$ \_\_\_\_\_  
Total Market: \$ \_\_\_\_\_ Market Share: \$ \_\_\_\_\_ %

Major Competitors: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



### Part 3 – Your Marketing Challenges

#### Distribution

Describe the channels or processes through which your end user receives your product or service:

\_\_\_ Direct    \_\_\_ Office    \_\_\_ Dealers    \_\_\_ Distributors    \_\_\_ Wholesalers  
\_\_\_ OEMs    \_\_\_ Mfr. Reps    \_\_\_ Mail/Web    \_\_\_ Discounters    \_\_\_ Other (describe)

What is your discount and/or pricing structure? \_\_\_\_\_  
\_\_\_\_\_

What are the biggest challenges you face in distribution? \_\_\_\_\_  
\_\_\_\_\_

What is your strongest sales region/area? \_\_\_\_\_ Weakest? \_\_\_\_\_

#### Competition

Who is your competition? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What do they do better? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Why do customers choose your competitors? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What would you say to change their minds? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What are you trying to do better, more of, or differently than your competitors?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



**Your Customers**

How would you describe your ideal customer? \_\_\_\_\_

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What is your ideal customer's demographic profile (if an individual, this might include age, gender, level of education, income, etc.; if a business, it might include size, location, or the demographics of the company's customer/end user)?

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What is your ideal customer's psychographic profile (this might include buying habits; reactions to changes in social, economic and other atmospheres; and so forth)?

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How do you exceed you customer's expectations?

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How do you disappoint your customer?

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What factors most affect your customer's choice?

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What are some of the cultural considerations your company makes to meet the needs of customers and customer groups (e.g., your international representatives receive training on multicultural business practices, or instruction manuals and other printed materials are made available in non-English languages and/or in Braille?)

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## External Factors

Is your product/service seasonal (explain)? \_\_\_\_\_

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What is the impact of international sources on your business? \_\_\_\_\_

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What are the most influential geographic factors affecting your industry (e.g., accessibility of efficient distribution transportation, perceived lack of product/service demand in certain areas)?

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What are the most influential social factors affecting your industry (e.g., the "suburbanization" of America has affected many companies' ability to market a consumer service)?

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What are the most influential economic factors affecting your industry (e.g., the "graying" of America is putting more and more of the population on fixed incomes)?

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What are the most influential political factors affecting your industry (e.g., decreases in farm subsidies may affect the supplies and cost of raw agricultural product)?

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What regulatory factors are affecting your industry (e.g., regulations governing the disposal of yard waste)?

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## Your Reputation

What is your position in the industry? \_\_\_\_\_

\_\_\_\_\_

What is your organization (product, service) known for or known as (see if your answer is different when considering various audiences or customers)?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Do those perceptions accurately reflect reality, and if not, what should your organization be known for or known as?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

What is your organizations single greatest strength? \_\_\_\_\_

What is the No. 1 problem or challenge right now? \_\_\_\_\_

\_\_\_\_\_

What, if anything, is being done or has been tried to solve this problem or address this challenge?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Is it working? \_\_\_\_\_



**Part 4 – Your Marketing Efforts**

What is your plan year?\_\_\_\_\_ What is your fiscal year?\_\_\_\_\_

What has been your marketing approach to date?\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Do you have current marketing plan? Yes\_\_\_ No\_\_\_

Do you current media plan? Yes\_\_\_ No\_\_\_

\_\_\_Existing schedules \_\_\_Existing contract \_\_\_Ad reprints  
\_\_\_Competitive materials \_\_\_Inquiry handling systems \_\_\_Fulfillment system

Have you conducted any recent research? Yes\_\_\_ No\_\_\_

Do you have current marketing budget? Yes\_\_\_ No\_\_\_

How is your marketing budget established?\_\_\_\_\_

\_\_\_\_\_

What are your long-range goals?\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What are your short-term objectives?\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What are your major opportunities?\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



What are the major problems? \_\_\_\_\_

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What are your future plans? \_\_\_Facilities expansion \_\_\_Acquisition/Merger \_\_\_Export  
\_\_\_Tap new markets \_\_\_Develop new products/services \_\_\_Other (describe)

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What are the most important marketing activities you think should happen this year?

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Are there any important issues, circumstances, or developments that are beyond our control that would impact the marketing/advertising effort (such as political “don’t go there” customs, opinions, practices, budgets)?

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What is your approval process for marketing plans and materials?

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Is everything in place to enable all who want to use the organization/product/service to do so?

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What are your expectations from a marketing campaign?

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How will you know if it's successful?

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What could keep a successful marketing plan or advertising campaign from being implemented?

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Thanks for Your Response