



BUSINESS PROFILE

Company Overview

Industries

Product and/or Service Offering

Market Segmentation

Brand Awareness/Positioning in Marketplace

Pain Points

(What are areas of struggle within sales and marketing?)



BUSINESS 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

SALES TEAM

Sales Process

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

Competition (Who are they?)

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



BUSINESS PROFILE

BRAND STORY

Philosophically, why do you do what you do?

Tagline

Meaning of Logo

Elevator Pitch

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



BUSINESS 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?

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

Budget (current marketing budget and expected marketing investment)