

Hidden Marketing Assets Marketing Systems  
*Opportunity Analysis Worksheet*

Business Name \_\_\_\_\_

Owners Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_

Date of Meeting \_\_\_\_\_ Time \_\_\_\_\_

Place of Meeting \_\_\_\_\_

*Note: This worksheet will help you to isolate the “Hidden Marketing Assets” in the business and determine specific Marketing Projects to optimize and leverage those assets for greater growth and profit.*

### **Step One: Solidify Trust and Rapport**

*Your Opening Line:*

I don't know how much \_\_\_\_\_ told you on the phone about who we are or why we are getting together today...so, let me tell you quickly a little about what we do.

What I do, and what my company does, is work with business owners, people like yourself, helping them to maximize their marketing success. Most of our clients are small and medium sized companies with sales under 5 million dollars per year.

We work with a unique marketing approach. We look at all of your marketing assets and find ways to leverage and optimize your success from the assets you already have in place.

Because we try to leverage existing marketing assets, you can often realize dramatic and profitable growth without having to invest a lot of money or make a lot of significant changes in your business operation.

So, what I would like to do with you today is take a look at your business and see where you are, where you're going and how you're getting there and see if there might be some ways we could help your business grow.

*Tie down – Does that make sense? (Wait for response)*

*Note: If prospect asks how you get paid say...*

We work strictly on a project by project basis and depending on what we do the fee is usually \$\_\_\_\_\_ to \$\_\_\_\_\_ per project.

Good, most businesses we work with fall into one of three different situations...(go over three situations.)

The three different situations:

- 1) They are OK but want to do better.
- 2) They are stagnant, no growth.
- 3) They are declining.

Tell me where you are now: \_\_\_\_\_

Would you like more growth?

How much more? \_\_\_\_\_ % \$ \_\_\_\_\_

## Step Two: Hidden Marketing Assets

### 1. U.S.P. / E.V.P.

*(Look for under promoted U.S.P. including owner or staff expertise, competitive advantages – price leadership, differentiation, focus, competitive disadvantages, unique products, guarantees, unique benefits, services, etc. Also look for ways in which extra value could be added.)*

Why should people do business with you? _____ _____ _____ _____
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Do all of your customers, prospects and staff know that? _____
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Why? _____ _____
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Why not? _____ _____
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Is your U.S.P. well integrated into all marketing efforts including staff? _____
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### 2. Leverage Current Marketing Process:

*(Look for low closing ratio, sub-par sales people, no follow-up, up-selling opportunities, packaging opportunities, current sales aides, staff allocation of time, reallocation of marketing dollars or redirection of marketing efforts to more profitable areas)*

Tell me about your current prospect to sales process:

What is your average closing ratio: \_\_\_\_\_%

*(If you have ten prospects how many of them will buy? Or, what is the response rate to mail or phone inquires and other marketing efforts.)*

What happens to the other \_\_\_\_\_% who don't buy?

Do you have a consistent method to follow-up on these prospects and leads?

### 3. Past, Present, and Prospective Customers:

*(Look for a customer base that is not being worked, inactive customers, lack of a data base, cross selling opportunities in the business, back end opportunities, re-activation opportunities etc.)*

How much does each customer spend now?

\$ \_\_\_\_\_

On the initial transaction?

\$ \_\_\_\_\_

Per year

\$ \_\_\_\_\_

Could that be improved? How?

\_\_\_\_\_

\_\_\_\_\_

Do you maintain a data base of prospects and customers?

\_\_\_\_\_

How many names on it now ?

\_\_\_\_\_

How many are active?

\_\_\_\_\_

How many are Inactive?

\_\_\_\_\_

How do you capture customer and prospect information?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

What are you doing now to consistently invite your customers back?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Don't you think it would be important to consistently ask them to do business with you?

\_\_\_\_\_

*(Remember the best source of additional business is the existing customer base.)*

#### 4. Alliance Opportunities

*(Look for relationships with other businesses particularly in their in own data base, look for businesses who target the same type of customer or has them in their data base now, look for complementary businesses that are located near by.)*

Who are your customers?

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Age Sex Income

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Where do they live?

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Are they individuals?

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Families?

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Other Businesses?

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What is their lifestyle?

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What other products or services do these people buy?

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What other businesses appeal to them?

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What other businesses do you know who may have the same type of customers?

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Is it possible for you to establish a marketing alliance with them?  
(Explain to them how an alliance will work)

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## 5. Media

*(Look for the different media they use, do they have an objective, do they use the media for their strengths, do they budget enough to be effective, do they spray & pray, do they reach the right market, with enough frequency, is the message compelling, is donation confused with advertising.)*

Do you do media advertising?

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What do you feel works the best?

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Why?

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What do you feel doesn't work?

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Why?

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What do you generally say in your ads? What is the message you want to get out?

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## 6. Community Marketing

*(Look for ways to boost the image in the community, is there unique owner expertise, or ideas for seminars or workshops, could you write a press releases? Are their community relationships that could be established, are there sponsorships or donations that would be appropriate?)*

What do you do now for boosting your image in the community?

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Do you do any donations or group sponsorships?

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Could they be leveraged for greater impact?

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Is there anything occurring in your business that would be newsworthy?

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## 7. Direct Marketing

*(Look for ways in which the business and its products and services could be marketed directly to the consumer through a letter, classified ad, infomercial, etc. See if this could expand the business beyond the local area.)*

What products do you have that could be marketed directly to consumers by mail or other means?

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Are you doing it now?

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*(If yes), tell me about the process:*

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*(If no), why not?*

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We work strictly on a project by project basis and depending on what we do the fee is usually \$\_\_\_\_\_ to \$\_\_\_\_\_ per project.

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Published by:

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