

CLIENT NEEDS ANALYSIS

Revised: 05.2023



About the Business

Client Information

Business Name: _____ Business Email Address: _____

Business Street Address: _____ State/Province: _____ Zip Code: _____

Age of Business/ Years in Operation: _____ Business Website: _____

Contact's First and Last Name: _____

Contact Phone Number: _____ Contact Email Address: _____

Social Media Accounts

*Which of the following social networks do you have a page or profile on? Select all that apply and provide a link to the business page:

- Twitter _____
- Facebook _____
- Instagram _____
- Pinterest _____
- LinkedIn _____
- TikTok _____

Current Marketing

Knowing this information will help better position your ad campaign.

*What, if any, web analytic tools are you using now? (i.e., Google Analytics, Hubspot, etc.)

- TV
- Billboards
- Digital Ads
- Print Ads
- Radio
- Video
- Other: _____

*Should video ads (Pre-roll, OTT/CTV, social) be included in the proposal? YES NO

*Please list the industry category that best fits your business (i.e., Automotive, Food and Beverage, etc.):

*What marketing tactics would you prefer to use? Check all that apply:

- Direct Mail/Flyers/Handouts
- Email Marketing
- Magazines and Newspapers
- Online Display and/or Video Advertising- Desktop
- Online Display and/or Video Advertising- Mobile
- Out of Home (Billboards, malls, digital displays, etc.)
- None
- Print and/or Online Directories (Angie's List, Yelp, YP, etc.)
- SEO and/or Content Marketing
- Social Media Paid Advertising
- Social Media Posts
- TV (Cable/Broadcast) Terrestrial or Streaming Radio
- PPC
- Other: _____

Marketing Plan

Campaign Details

*Proposed Campaign Start Date: _____ *Proposed Campaign End Date: _____

*What is the click-through destination of the campaign?

Customer Website

*Does the website have an e-commerce shopping cart? YES NO

Lead Generation Page

Customer Business Facebook Page

The click-through destination is the page viewers of the ad are directed to. For example, this can be a website home page, a specific page on the business' website, or even a Facebook fan page if you do not have a website. The best practice is to pick a page that expands on the content of the ad and encourages the person that clicked on the ad to complete an action. This how-to action could be making an appointment on the website, submitting their email address to sign up for a newsletter, or even purchasing an item on the website.

*What is the URL of the click-through destination? (This should be a URL)

Campaign Goals and Objectives

What are your goals for this campaign? Be as specific as you can. This section will inform the campaign tactics that will be included in the proposal.

*Describe your campaign goals (i.e., I would like to increase my sales volume by 10 units more per week.):

*Select an objective for your campaign that reflects the goals described above:

Create awareness of your business and build your brand

Promote a sale or event

Promote a specific product or service

Drive visits to your website or social media

Geofencing

Campaign Budget

*What is the total requested monthly campaign budget? (Please provide dollar amount) _____

*How much is the typical sale for your business? (Please provide dollar amount) _____

Target Audience

Target Audience

Define your target audience so that we are making the most of your ad budget by displaying your advertising to a particular group that is more likely to be interested in your product or service.

*What is your preferred gender for your target audience? Male Female

*What is the age range of the target audience? _____

*What is the annual household income of the target audience? _____

Target Audience Lifestyle and Behavior

*What common traits do your customers share? Are they single, parents, renters, interested in fine dining, etc? What are the interests and hobbies of your customers? Let us know the characteristics so we can better target you audience and better optimize your your campaign's performance.

I.e., married, homeowner, have children at home, interested in the outdoors, owns an RV, etc

Target Audience Location

*Where do your customers live and work? Where are your potential customers located? What geographical area do you want to target for your online ad campaign? Please provide zip codes/postal codes and city/town names with the radius you want to target (in miles.) If you're targeting a city or a town, list the state or province the city or town is located in:

Zip Codes/Postal Codes to target: _____

Counties/Designated Market Area (DMA): _____

City or Town(s) to target and radius: _____

How far around the area specified should the ad be displayed? _____

*Who are your top three competitors? Please list their business names and website URL if available:

*For the purposes of specific location targeting, please provide addresses you would like to target:

Additional Information

Additional Information and Questions

*Is there anything else you'd like us to know about your business as we build your proposal?

*Please include any additional information or questions here:

Follow-up Meeting Date/Time: _____