Prospecting Leads Part 4:
"Performing A Needs Assessment"

Once you have begun a conversation with the prospective client, you must learn more about their current systems, efforts, fail-points, concerns, goals, objectives, and expectations. In order to close the deal, you must convince them that our products will provide a great value to their business. To do this you must determine which of our services are right for the prospective client, and why. We do this by presenting our clients with research we have conducted as well as having our clients fill out various questionnaires. Through these processes we can form an accurate needs assessment.

Step 1: We Ask Questions

First we ask a series of basic questions to the prospective lead. It is now imperative that you determine which of our services are right for the prospective client, and why. Through this initial set of core questions there are many things we can determine about our prospective clients.

Basic Questions:

1. *What is your preferred method of contact?*
2. *What is your availability?*
3. *Does your Brand have a Name & Slogan?*

Brand Overview Questions: Designed for you to input yes/no answers as well as begin description of current efforts. Answer the following based on current efforts/presence milestones already in existence to some degree:

1. *Do you have a website? (circle one) YES / NO*
   If so…
   a. *Is it mobile responsive? YES / NO*
   b. *Is there search capability on site? (evidence of a database) YES / NO*
   c. *Is there a login/membership system? YES / NO*
   d. *Is there a E-commerce shop? YES / NO*
   e. *Are there SEO efforts evident? YES / NO*

2. Does your brand have an app? YES / NO

3. Do you have a Google Business Listing? <u>YES / NO</u>

3. Do you have an existing social presence?________________________________
   If so, which platforms?
      Facebook?____
      Instagram?____
      Twitter?____
      Pinterest?____
      Snapchat?____
      Other?__________________________

4. Are you implementing paid efforts?* (i.e search engine marketing [Google Adwords, sponsored blogs, etc.] or social media paid promotions?)

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**Not every company needs paid promotion on every platform. Always focus on reaching the prospective client's audience as effectively as possible.*

5. Are you implementing traditional efforts?** (i.e TV ads. heavy use of flyers, traditional PR, newspaper/magazine ads, radio commercials, etc)

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***If they have a primarily traditional marketing strategy this is a good indication that basic digital services may be a good sell to them.*

6. Are you using high quality graphics? (i.e product photography, GIFs/video, animations, personalized logo, etc.____

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<u>Step 2: We Ask More Questions:</u> We present further questionnaires to our already interested prospective clients. Below you will find more questionnaires that will represent more specific focuses.

1. [Website Questionnaire]
2. [Social/Digital(?) Questionnaire]

3. Design Questionnaire

Step 3: We Perform Research

We use the Report Generators to obtain percentage scores (these reports can be linked in Presentations) & quickly find fail-points in a prospective lead's efforts. We do this in attempt to understand more about your lead. This will make the proposal process much smoother and will increase the chance of your needs assessment being closer to their desired goals.

Report Generators:

1. SEO (useful for websites)
2. Social Media
   a. Facebook- likealyzer
   b. Other platforms: Monitoring report/analysis
3. Digital Marketing
   a. SpyFu

Step 4: Goals/Objectives Overview: The last step in our Needs Assessment is determining their Goals and Objectives. (NOTE: This is a great starting point for Presentation Introductions!)

Strengths:

- Where is your company in its current growth?, include at least 1 positive fact/comparison to industry standard.

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- What current efforts already in place and what are their effects?

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Weaknesses-->Threats:

- What was the initial KPI triggered for your prospective leads?

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- What are some secondary KPIs that are common amongst your prospective leads?

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- What are some of your major complaints?
- What have you determined are the “Biggest leaks in the bucket” or fail-points in your current marketing system?

Opportunities:

- How can we use your current data points and efforts as resources for new growth?
- How can UpCode’s services increase ROI overall?