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## Customer Intake Discovery Questionnaire

Your Company Name and URL

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What is your name and title? What is your role in the company?

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Please describe your company and services.

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What are your goals for the coming year?

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What have been your challenges in the past?

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Who is your target audience? What are their titles? What are their industries? Annual revenue? Size?

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Do you have a company logo? If yes, do you have access to all logo files? Are you happy with your logo at this time?

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Are you interested in updating to a new website at this time? YES/NO (circle one)

Are you currently doing inbound content marketing with a focused strategy for SEO? YES/NO (circle one)

Are you currently using social media? Facebook, LinkedIn, Twitter, Instagram? Are you looking for us to take that off your plate? YES/NO (circle one)

Are you currently using email marketing? YES/NO (circle one)

Are you currently using marketing automation? YES/NO (circle one)

How are you generating leads for your business today?

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How many leads on average come through your website per month today? -----

How large is your email list of prospects today? -----

Are you using a CRM and which one? -----

Are you open to switching to HubSpot? YES/NO (circle one)

Do you have a sales team? How many people?

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What is your 2021-22 marketing budget? If you are looking for a new website, what is your budget for that?

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Do you have customers who would be willing to provide a quote about how your services have assisted them on video or by phone? YES/NO (circle one)

What are the top three strengths of your organization?

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What are the weaknesses of your organization?

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Who do you consider to be your top three competitors? What are they doing that you feel is strong?

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What makes you stand out from your competition?

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How do you charge for your services?

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Where do you see your organization in three years? Seven years?

Three years:

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Seven years:

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In your own words, what are your top marketing objectives and why are you considering working with BigOrange at this time?

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*This information is extremely valuable to better understand your business.*

## **Get Leads and GROW**