



500 Wyoming Ave Unit #2
Cincinnati, OH 45215
(513) 238-5792
margee@bigorange.marketing
<https://bigorange.marketing/>

Customer Intake Discovery Questionnaire

Your Company Name and URL

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

Please describe your company and services.

What are your goals for the coming year?

What have been your challenges in the past?

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

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?

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?

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?

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

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?

What are the weaknesses of your organization?

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

What makes you stand out from your competition?

How do you charge for your services?

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

Three years:

Seven years:

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

This information is extremely valuable to better understand your business.

Get Leads and GROW