



## Client Profile Questions

### *Identifying and qualifying clients*

#### ***Basic Information:***

- Company name:
- Contact name:
- Birth date (month/day):
- What is the name of the receptionist? Their birthday?
- What is the name of your assistant? Their birthday?
  
- Corporate address:
- City:
- State:
- Zip:
  
- Alternate address:
- City:
- State:
- Zip:
- Phone number:
- Fax number:
- Mobile number:
  
- Home number, if applicable:
- 800 number:
- E-mail address:
- Web Site address:
  
- Other                      Contact names:                      Titles                      E-mail
  - 1.
  - 2.
  - 3.
  - 4.
  - 5.
  - 6.
  
- What is the company's anniversary date?
- **What is your anniversary date with the company?**
- How long as the company been in business?
- Do you have print collateral for the company? Annual Report/Brochure

- Do you have a company directory?
- Is it possible to get a copy of that company directory?
- What are some of your hobbies?
- **What are some of the hobbies of the principle(s) in the company?**

### ***Company Position:***

- What is the primary function of your business?
- What do you do specifically?
- What is the secondary function?
  
- Do you have more than one location?
- How many?
- Other location addresses:
  
- What do you do at each location?
  - Manufacturing:
  - Sales and Marketing:
  - Support:
  
- Do you market your company's services?
  - Locally:
  - Nationally:
  - Regionally:
  - Internationally:
  
- **How many competitors do you have in your industry?**
  - Locally:
  - Regionally:
  - Nationally:
  - Internationally:
  
- What percentage of the market share do you own?
  - Locally:
  - Regionally:
  - Nationally:
  - Internationally:
  
- How are you positioned/ranked among your competition?
  
- **Do you have a marketing plan/strategy?**
  - Please describe:
  - May I get a copy?
  
- Do you have a mission statement?
  - May I get a copy?

- What is the company's vision?
  - May I get a copy?
- What is the Corporation's annual sales volume?
- Is you a public company or privately owned?
- Are you listed on the stock exchange?
  - OTC:
  - NASDAQ
  - NYSE:
  - Other:
  - Ticker Symbol:
- **Does your company have a particular philanthropy(s)?**
  - **Explain your involvement with those philanthrophies...**

## ***Marketing***

- Do you have a marketing department?
  - Name:
  - Contact name:
  - Number:
  - E-mail:
- What is the best way to reach them during business hours?
  - Phone:
  - Fax:
  - E-mail:
- May I get a copy of the marketing plan/strategy?
- Do use an ad agency?
  - Name:
  - Contact name:
  - Number:
  - E-mail:
- Does your agency supply a portion or all of your Promotional Products?
- What about printing, print collateral, marketing, P.O.S. and support materials?
- **Generally what is the determining factor when placing an order?**
  - Price:
  - Quality:
  - Service:
  - Creativity:
  - Or all of the above:
  - Please rank in order of importance:
- Have you ever marketed a product or service using promotional products?

- If yes, was it effective? Explain?
- If no, why do you feel it was ineffective?
- What is your perspective of promotional products?
- What is your current advertising budget per year?
- Do you create separate budgets for each program?
- **Do you require your vendors to sign a non-disclosure agreement?**
- When promotional products are ordered, what is your process?
- Do you currently do direct mail? Direct marketing?
- What is your average response rate or rate of return?
- Are you familiar with Focus Direct© marketing via direct mail?
- If you currently do direct mail do you use Val Pac and/or something equivalent or does your agency do you work?
- What forms of direct marketing do you currently do? Are they effective?
- What type of response rates would you like to see through your marketing efforts?
- ***If a creative idea was brought before you, would you and your staff be willing to sign a non-disclosure and or a non-compete? (MAJOR QUESTION)***
- Were you aware that within the promotional products industry there are over 400,000 different products that can be imprinted?
- Were you aware of the statistics that promotional products are very effective when marketing your company?
- Would you be interested in getting in on our catalog program where we would ship you or bring you by a catalog your choice once a month?
- Would you be interested in a research tool where you could research on your own and at your own pace?
- **Do you currently buy apparel for the company?**
- Do you have a corporate casual policy?
- Do you ever have the need for fulfillment services?
- **What about packaging? Have you ever used packaging in a promotion?**
- Would getting pre-production samples be a helpful tool when determining which vendor to use?
- If you exhibit trade shows, do you do pre-show and or post showed mailings?
- ***Explain how you currently "measure" the success of a promotional campaign?***
- Do you know any of the statistics surrounding the use of promotional products and their effectiveness on marketing programs?
- What are some of the greatest challenges facing your marketing department?
- What other methods of advertising do you currently use:
  - Promotional products:
  - Radio:
  - Television:
  - Print media:
  - Direct mail:
  - Web Banner Ads:

- Other (billboards, etc.)
- Trade shows:
  - How many per year?
  - Which method do you find most effective?

### ***Human Resources***

- How many employees do you currently have?
- Do you have a H.R. department?
- Contact name? Email:
- Generally what is the determining factor when placing an order:
  - Price:
  - Quality:
  - Service:
  - Creativity:
  - Or all of the above:
  - Please rank in order of importance:
- **Are you?**
  - **Union:**
  - **Non-union:**
  - **Both:**

### ***Purchasing/Accounting***

- **Our credit terms are (NET 10), what credit terms do you generally work within?**
- Does each branch or division have the capacity to buy on his or her own?
- Does each department have the same latitude to purchase?
- Do you require a purchase order?
- Does the corporation require three bids, or what is the process?
- What are your purchasing requirements?
- Do you have a preferred vendor list? What is the process get on that list?
- **Generally what is the determining factor when placing an order:**
  - **Price:**
  - **Quality:**
  - **Service:**
  - **Creativity**
  - **Or all of the above:**
  - **Please rank in order of importance:**
- Do you require your vendors to sign a non-disclosure agreement?
- When promotional products are ordered, what is your process?
- How you go about selecting vendors?
- Do you have a key vendor list? If yes, how does a vendor get on that list?

- Does your company have the ability to work and transmit business paperless? If yes, is this the preferred method?

## ***Vendor qualifications***

- What are your expectations of your vendors?
  - Marketing:
  - Purchasing:
  - Sales:
  - Human Resources:
  - Other:
- What do you like most about your current promotional product vendor?
- What you like least about your current promotional product vendor?
- What would I need to do to earn the right to do business with you today?
- Do you believe in win-win partnerships with your vendor?
- Do you recognize and reward vendors at year-end?
- What would you feel the greatest advantage a vendor could bring for;
  - You personally?
  - Your department?
  - Your company?
- What is the process you use in selecting vendors?
- Do you have a key vendor list?
- If yes, how does a vendor get on that list?

## ***Programs***

- Do you have a safety program?
  - Name of contact in charge of the program?
  - Phone number?
  - E-Mail?
- Do you have an in-house incentive program for sales?
  - Name of contact in charge of the program?
  - Phone number?
  - E-Mail?
- Do you have an in-house recognition program for all employees?
  - Name of contact in charge of the program?
  - Phone number?
  - E-Mail?
- Do you recognize employee's birthdays?
  - Tenure?
  - Name of contact in charge of the program?
  - Phone number?
  - E-Mail?
- Do you have a salesperson of the month/year program?
  - Name of contact in charge of the program?

- Phone number?
- E-Mail?
- **Do you currently exhibit at trade shows?**
  - **Name of contact in charge of the program?**
  - **Phone number?**
  - **E-Mail?**
  - **Do you find trade shows the effective?**
- Do you have a catalog program?
  - On the web?
  - Name of contact in charge of program?
  - Phone number?
  - E-Mail?
- Do you sponsor golf outings?
- Any other events?
- Name of contact in charge of program?
- Phone number?
- E-Mail?
- Do you have a company's store is it managed internally or off-site?
- Do you have an E.Commerce strategy?
- Do you have any current programs that you're working on?
- Do you typically have events throughout the year for employees?

### ***Your Competition***

- To your knowledge, do your competitors use promotional products?
- What are their weaknesses?
- Strengths?
- How many competitors do you have?
- Locally:
- Regionally:
- Nationally:
- Internationally:

### ***Web/Internet***

- Do you have a Webmaster?
- Name:
- Number:
- E-mail:
- Do you have an intra-net site?
- How is it used?
- Does your company have the ability to work and transmit business paperless?
- If yes, is this the preferred method?



The client will generally give you a wealth of information, the key is to ask questions that are going to require more than just a yes or no answer, leading questions will lead to more in-depth information. It is very important to establish a client profile. Many times client has said to me, 'why do you ask so many questions?' My response is always the same, "how can I better serve you or your company in the very best way if I cannot respond in kind." As you review this list of questions, understand that these are the questions that are most important to me; for you they may be different. Consider the impact of each question and make your own determination. Each one of you depending on your vertical or horizontal market structure may have a whole series of separate questions; there are no wrong questions. If your vertical focus is hospitals pharmaceutical companies, your line of questioning should be directed in that fashion. If you deal with construction companies, contractors, builders, then your line of questioning may be totally different than other markets. Whatever you do this year remember, the bottom line is don't forget to ask questions and find out as much about the client, the client's competition, the people within that client's office. In all of those answers, there are hidden revenue possibilities for you that will be innumerable to imagine.

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