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## Questions to Kick Off a New Client Partnership

Below is a list of questions that we dive into with prospective clients. We can discuss these in a meeting, or you can provide input in advance. As you review these questions, you will get a sense of the approach we take. Our mutual success is defining clear objectives and assembling a solid team of people to tackle the challenges.

Number of employees

Approximate revenue

Top 2-3 competitors

1. What are the company's annual growth objectives in % or dollar terms for the next three years?
2. Do you have defined sales and marketing plans that are aligned to each other?
3. How many people are on your internal marketing team, and what are their roles?
4. What does your marketing team do with strategic planning, both short term and long term?
5. What market research do you conduct or review regularly?
6. What are the most common difficulties experienced by your customers?
7. What KPIs do you benchmark, and how are the current programs measured and reported?
8. Does your marketing team have direct access to your website, analytics, PPC reports, and customer/prospect database?
9. Are there lead nurturing programs or marketing automation programs in place?
10. Who is your most valuable client or customer?
11. In regards to your experience with marketing, what do you think has worked for you in the past and what hasn't?
12. What are your biggest sales challenges?
13. Does your company promote/prioritize its mission and core values, and how do they impact marketing and sales communications?
14. What does success look like for you?
15. How are you evaluated internally?
16. Have you ever worked with a marketing firm(s)? If so, what services did the firm(s) provide?
17. What are your key pain points with your current agency?
18. What marketing functions are you looking to outsource, and what do you handle in-house?
19. What is the most critical thing you want from your agency relationship?
20. In your opinion, who in your industry does a great job with their marketing?
21. How has the pandemic changed your business, customers, products/services?