



Marketing Assessment & Needs Analysis

About You

Name: _____ Title: _____

Company _____

Address: _____ : _____

County, Postcode: _____ Email: _____

Phone: _____ Website: _____

If you do not have a website, are you interested in having one? Yes No

About Your Company

Briefly describe your organisation and what differentiates you from your competitors.

Does your marketing effort focus on particular verticals (i.e., healthcare, education) Yes No

If yes, please list the industry (or industries): _____

Length of time in business: _____ years Number of employees: _____

Do you have a dedicated marketing department? Yes No

Do you have a dedicated marketing budget? Yes No

If yes, what is allocated? _____

Do you have a mission statement? Yes No

If so, what is it? _____

About Your Needs

What are your primary goals and objectives for your marketing effort? (Mark all that apply)

To build business and increase sales (Branding) To increase market awareness

To generate leads/requests for information To support existing marketing efforts

Other, please list: _____



Do you have a marketing/strategic plan? Yes No

If yes, please explain: _____

If no, are you interested in working with SwiftCRM to develop one? Yes No

Do you currently have corporate and brand identities? Yes / No

If no, would you be interested in SwiftCRM creating a logo for you?
Yes / No

If yes, would you be interested in SwiftCRM revamping it? Yes / No

Do you currently have a prospect database? Yes / No

If yes, approximately how many prospects do you have? _____

If no, are you interested in SwiftCRM helping you create a prospect database? Yes No

Do you currently have a client newsletter? Yes No

If no, would you be interested in SwiftCRM creating one for you? Yes No

If yes, do you post it on your website? Yes No

Do you currently have business cards, letterhead, envelopes, etc.? Yes No

If no, would you be interested in SwiftCRM creating stationery for you? Yes No

If yes, would you be interested in SwiftCRM enhancing it for you? Yes No

Do you currently have print marketing collateral? Yes No

If no, would you be interested in SwiftCRM creating pieces for you? Yes No

Do you currently send marketing e-mails? Yes No

If no, would you be interested in SwiftCRM creating marketing emails for you? Yes No

If yes, would you be interested in SwiftCRM enhancing the emails for you? Yes No

Please mark all the services you would be interested in to attain your primary marketing goals and objectives for your company:

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| <ul style="list-style-type: none"> Marketing Strategy Online Advertising Client Newsletter Direct Mail (brochure, etc.) | <ul style="list-style-type: none"> Corporate Identity Email Marketing Client Letters Stationery | <ul style="list-style-type: none"> Web Development E-Newsletter Seminar for Clients Tradeshaw Displays |
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