

This form should be used to document your conversation, not direct it. It is divided into key areas to help you uncover client needs and opportunities for you to solve problems. Find the pain and solve the problem. Remember that the C.N.A. is a process and not an event. Every engagement with a client is an opportunity to uncover more needs and work to deliver solutions for those needs.

First focus area: Your client / prospect / customer

1. What's your story?
 - a. How did you get into this business, anyway?
 - b. Why do you do this, besides the money?
 - c. You are successful. What's your secret or what are the things you did to get here?
 - d. What's the next level for you?
 - e. What's preventing you from being there?
 - f. If we were to ask your customers to describe you with one word or one sentence, what would that be?
 - g. Are there any misconceptions about your business?
 - h. What's one thing you wish people knew about you?
 - i. Are you currently fully staffed? (If not, how short are you?)
 - j. What is not being fully staffed costing you?
 - k. How are you finding new staff members?

Second focus area: Their client / prospect / customer

2. Your customers and potential customers – what's their story?
 - a. Why do they do business with you?
 - b. Do your customers engage with you on social media?
 - c. What similar product categories do your customers regularly use?
 - d. Who is your ideal customer? Think of one specific person and describe them.
 - e. If you could create the ideal customer that is currently not shopping from you, how would you describe them?

Third focus area: Competitors

3. If people aren't buying from you, who are they buying from?
 - a. What are your competitor's strengths?
 - b. What are your competitors known for? (Use one phrase to describe them)
 - c. What are your competitor's weaknesses/vulnerabilities?
 - d. What is something your competitor does that drives you crazy?

Fourth focus area: Financial

4. How many people shop here in an average week?
 - a. What percentage of them buy from you?
 - b. When they buy, on average how much do they spend?
 - c. How often do they buy from you again?
 - e. What is something your current or future customers don't know about you?
 - f. Do any of the brands you carry offer co-op funding? (If not aware...)
 - g. Would you like me to research that for you? Can you provide your dealer number?

Inventory Analysis:

What is your goal for the turn-rate of your inventory?

Do you have any inventory that needs to be moved now?

How do you evaluate what products/services to offer?

How often does that change?

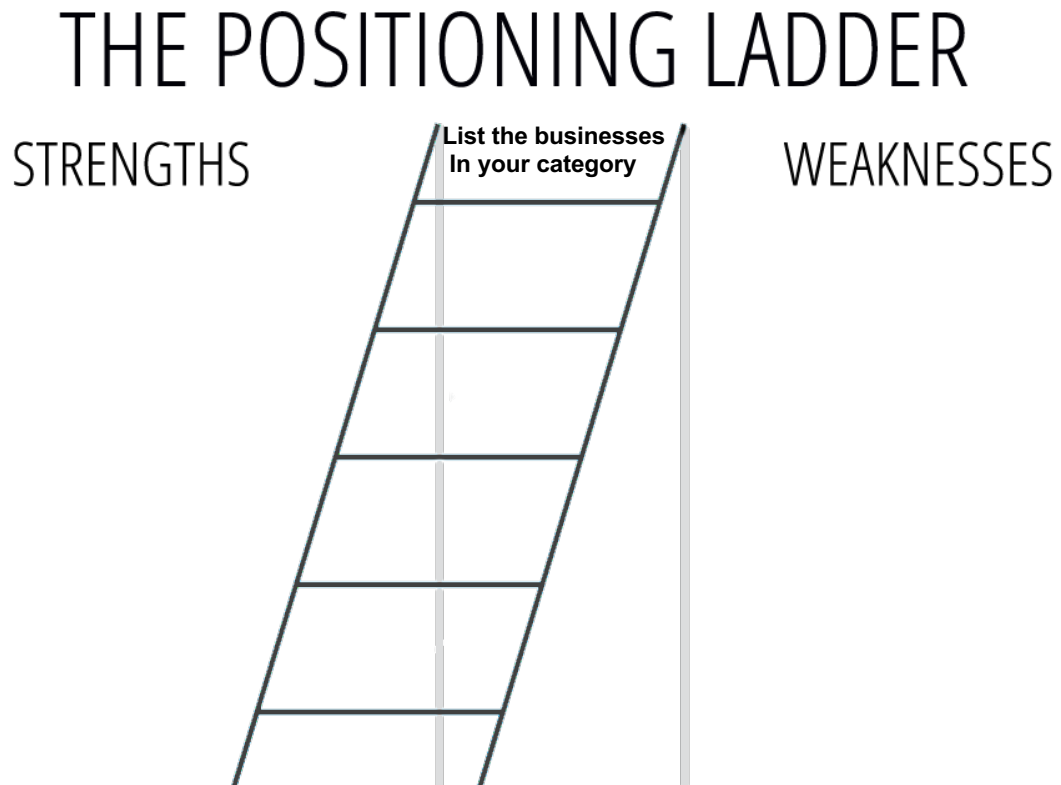
Profit Centers: (Primary areas that drive revenue for your business)

Profit Center	% of Sales	Margin	% of advertising

What keeps you up at night?

Advertising/Marketing:

Mindshare = Market share. Who has the dominant position in your category in the market?
Where are you on the ladder?



Promotions/Sales/Event Calendar:

January	February	March	April	May	June
July	August	September	October	November	December

What has been your best promotion/sales event to date?

Why?

What are the reasons to advertise your business? (Check all that apply.)

- | | |
|--|--|
| <ul style="list-style-type: none"> <input type="radio"/> Sell something right now <input type="radio"/> Increase name awareness <input type="radio"/> Change / enhance image <input type="radio"/> Align with a purpose or cause <input type="radio"/> Find new customers <input type="radio"/> Get people talking <input type="radio"/> Beat / keep up with competitors <input type="radio"/> Drive social media engagement | <ul style="list-style-type: none"> <input type="radio"/> Take advantage of digital advertising <input type="radio"/> Create / solidify my brand position <input type="radio"/> Promote new merchandise/services <input type="radio"/> Build employee / company morale <input type="radio"/> Having a sale <input type="radio"/> Educate potential customers <input type="radio"/> Clear up misconceptions <input type="radio"/> Move old inventory |
|--|--|

Circle the top three

Advertising Balance Sheet

Strengths of current plan?	Opportunities to improve the current plan?

Marketing/Advertising:

How have you marketed / advertised your business so far?

What form of advertising has provided you with the best results?

What is your overarching strategy when you purchase advertising?

What do you count on from your advertising representatives?

What is your digital strategy and presence?

What is the goal of your website?

What do you want people to do once they get there?

Is there a section of your website you wish more people would visit?

Why aren't they visiting it now?

How are users currently finding your website?

How do potential and existing customers use your website along their path to purchase?

Does someone measure traffic and activity on your site?

Does that activity match the goals and purpose for your site?

How relevant do you find social media in attracting new customers?

Are you more concerned with attracting new potential customers or actively engaging your existing fans/followers through social media?

What are some examples of how your traditional advertising works in sync with your digital, social, mobile and search?

You've spent \$_____ (ballpark) in the last three years. If I say your name, what's the one thing everyone will say, no matter who I talk to?

How do you measure the success of your marketing investment?

A year from now, how will we know if your marketing is working?

What is your common phrase or set of words that you use across all advertising platforms?

Do you have a tag line or positioning statement?

Start at the bottom with the year you started in business, and then list all the things that got you to where you are today – those things that made you successful.

Then at the top, describe what the “next level” looks like for you and list all the things that are preventing you from getting there right now

Next Level

Current (Today)

You started in business in: _____

Final Question:

Of all the things we discussed today, what's the ONE THING – that lingering issue, that if we could solve it, we would be heroes in your eyes?