



## Standard Kickoff Questionnaire

Point of Contact (POC)


### Overview

Please describe your organization.

- (Please give a detailed overview of your organization.)

What services or products do you provide?

- (Please provide a bulleted list of services and products.)

How long has your organization been in business?

- (Please include year and transitions + M&A, if applicable.)

How large is your organization?

- (Number of employees, locations, franchises etc.)

How has your organization grown over time?

- (Staffing, technology, revenue, services, etc.)

What are the objectives and goals of your organization?

- (Objectives are desired actions from customers/clients or company initiatives.)

Who are the main competitors in your industry?

- (List the closest competitors in your market and their differentiators.)



## Audience and Prospects

Provide a snapshot of your current customer base.

- (Tell us about any relevant demographics, including geographical location, age, gender, interests etc.)

What are your sources for lead generation?

- (This can include referrals, online, offline and other sources.)

Can you tell us about the sales/service lifecycle of your client/customer?

- (How do you start a new relationship and what is the retention rate?)

Is there a particular demographic you wish to attract?

- (New markets, niche markets within your markets, etc?)

## Positioning: What makes you unique?

What are the unique points of difference for your product, service or brand story?

- (What are the key differentiators between you and your competition?)

What is the most important message you want prospects to know about your organization?

- (If you had a conversation with someone who knew nothing about your business, what is the #1 thing you want them to walk away with?)

## Branding and Design

Do you feel your brand matches your products or services?

- (Logo, marketing materials, collateral, social media, copy, messaging, etc?)



Do you have any official brand guidelines?

- (Logo marks, fonts, colors, etc.)

What are some other brands with designs that you like?

- (These can be brands inside or outside your industry.)

Do you have any strong design preferences?

- (Minimalist, colorful, flashy, elegant, simple?)

Do you have any preferences when it comes to voice, tone or language?

- (Word choice, tone of voice, characterization of the company, etc.)

## Online Presence

Is your website driving results and how are they measured?

- (How are you keeping track of new leads that result from your current website?)

What calls to action are more effective for your target audience?

- (Phone calls, emails, forms, etc.)

Do you have a sense of what pages you need on your sitemap?

- (Please give a bulleted list of site pages.)

Is there any special functionality you wish your site to perform?

- (eCommerce, employee portals, third party extensions, etc)