

# Hidden Marketing Assets Marketing Systems *Opportunity Analysis Worksheet*

Consultant's Here Is (The Big Picture In Using The Unlock The Code Selling Strategy For Getting Clients)

The Steps You Need To Be Thinking About As You Take Your HMA Consultants Through The Process.

Step 1) Find out what is important to them. (Code words)

Step 2) Find biggest problems and pain

Step 3) Find hidden assets

Step 4) Link problems/hidden assets/code words

Business Name \_\_\_\_\_

Owners Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_

Date of Meeting \_\_\_\_\_ Time \_\_\_\_\_

Place of Meeting \_\_\_\_\_

## Step One: *Solidify Trust and Rapport*

When we made the decision to get together and talk today, you probably had some idea of what we might do or what we might be going over today... let me ask you... why did you choose to talk/meet with me today?

Write down code \_\_\_\_\_

Tell me a little bit about your business?

If I had a magic wand and could grant your one wish for your business, what would be most important to you? ( Look for code words)

Ultimately what's important about **(CW)** \_\_\_\_\_ for you?

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What's your biggest problem or biggest problems you faced in trying to market or grow your business? \_\_\_\_\_

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### ***Your Opening Line:***

I first off want to say, that I have no idea if I can help you. I don't know if we are a match and if any of this is going to make sense to you at all.

But what I do, and what my company does, is work with business owners, people like yourself and we help them to maximize their marketing success using a 20 year old proven step-by-step marketing system.

Today we'll take a look at some of your marketing assets and see if we can find some ways to bring you more (insert code words) \_\_\_\_\_.

Because the system is designed to leverage existing marketing assets, you can often get dramatic and profitable growth without having to invest a lot of money or make a lot of significant changes in your business operation.

So, what I would like to do with you today is take a closer look at your business and see where you are, where you want to go and hopefully I can show you a few neat ways to help you get there weather we work together or not.

Tie down – Is that fair? (Wait for response)

Note: If prospect asks how you get paid say...

We work strictly on a project by project basis and depending on what we do the investment is usually \$\_\_\_\_\_ to \$\_\_\_\_\_ per project.

*Note: This worksheet will help you to isolate the “Hidden Marketing Assets” in the business and determine specific Marketing Projects to optimize and leverage those assets for greater growth and profit.*

## **Step Two: Hidden Marketing Assets**

### **1. U.S.P. / E.V.P.**

*(Look for under promoted U.S.P. including owner or staff expertise, competitive advantages – price leadership, differentiation, focus, competitive disadvantages, unique products, guarantees, unique benefits, services, etc. Also look for ways in which extra value could be added.)*

Why should people do business with you?

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Do all of your customers, prospects and staff know that?

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Why?

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Why not?

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Is your U.S.P. well integrated into all marketing efforts including staff?

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Do you see how a U.S.P. well integrated into all marketing efforts including staff can get you (CW) \_\_\_\_\_?

## 2. Leverage Current Marketing Process:

*(Look for low closing ratio, sub-par sales people, no follow-up, up-selling opportunities, packaging opportunities, current sales aides, staff allocation of time, reallocation of marketing dollars or redirection of marketing efforts to more profitable areas)*

Tell me about your current prospect to sales process:

What is your average closing ratio: \_\_\_\_\_%

*(If you have ten prospects how many of them will buy? Or, what is the response rate to mail or phone inquires and other marketing efforts.)*

What happens to the other \_\_\_\_\_% who don't buy?

Do you have a consistent method to follow-up on these prospects and leads?

## 3. Past, Present, and Prospective Customers:

*(Look for a customer base that is not being worked, inactive customers, lack of a data base, cross selling opportunities in the business, back end opportunities, re-activation opportunities etc.)*

How much does each customer spend now?

\$ \_\_\_\_\_

On the initial transaction?

\$ \_\_\_\_\_

Per year

\$ \_\_\_\_\_

Could that be improved? How?

\_\_\_\_\_

\_\_\_\_\_

Do you maintain a data base of prospects and customers?

\_\_\_\_\_

How many names on it now ?

\_\_\_\_\_

How many are active?

\_\_\_\_\_

How many are Inactive?

\_\_\_\_\_

How do you capture customer and prospect information?

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What are you doing now to consistently invite your customers back?

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Don't you think it would be important to consistently ask them to do business with you?

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*(Remember the best source of additional business is the existing customer base.)*

#### 4. Alliance Opportunities

*(Look for relationships with other businesses particularly in their in own data base, look for businesses who target the same type of customer or has them in their data base now, look for complementary businesses that are located near by.)*

Who are your customers?

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Age Sex Income

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Where do they live?

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Are they individuals?

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Families?

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Other Businesses?

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What is their lifestyle?

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What other products or services do these people buy?

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What other businesses appeal to them?

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What other businesses do you know who may have the same type of customers?

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Is it possible for you to establish a marketing alliance with them?  
(Explain to them how an alliance will work)

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## 5. Media

*(Look for the different media they use, do they have an objective, do they use the media for their strengths, do they budget enough to be effective, do they spray & pray, do they reach the right market, with enough frequency, is the message compelling, is donation confused with advertising.)*

Do you do media advertising?

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What do you feel works the best?

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Why?

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What do you feel doesn't work?

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Why?

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What do you generally say in your ads? What is the message you want to get out?

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## 6. Community Marketing

*(Look for ways to boost the image in the community, is there unique owner expertise, or ideas for seminars or workshops, could you write a press releases? Are their community relationships that could be established, are there sponsorships or donations that would be appropriate?)*

What do you do now for boosting your image in the community?

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Do you do any donations or group sponsorships?

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Could they be leveraged for greater impact?

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Is there anything occurring in your business that would be newsworthy?

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## 7. Direct Marketing

*(Look for ways in which the business and its products and services could be marketed directly to the consumer through a letter, classified ad, infomercial, etc. See if this could expand the business beyond the local area.)*

What products do you have that could be marketed directly to consumers by mail or other means?

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Are you doing it now?

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*(If yes), tell me about the process:*

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*(If no), why not?*

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We work strictly on a project by project basis and depending on what we do the fee is usually \$\_\_\_\_\_ to \$\_\_\_\_\_ per project.

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Michael Senoff  
JS&M Sales & Marketing Inc.  
4735 Claremont Sq. #361  
San Diego, CA 92117  
1-800-237-0634 Office  
858-274-2579 Fax  
[michael@hardtofindseminars.com](mailto:michael@hardtofindseminars.com)  
<http://www.hardtofindseminars.com/MarketingConsulting.html>

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