



Name of Your Business: \_\_\_\_\_

Who should be receiving notifications of new leads?

Name: \_\_\_\_\_ Email: \_\_\_\_\_ Phone: \_\_\_\_\_

How many leads per month do you currently get from your online marketing? \_\_\_\_\_

How many leads per week do you currently get from your online marketing? \_\_\_\_\_

How many leads per day do you currently get from your online marketing? \_\_\_\_\_

How many online marketing leads do you consistently turn into customers? \_\_\_\_\_

How long is your current sales cycle? \_\_\_\_\_

How many customers do you need monthly to keep your business growing? \_\_\_\_\_

How quickly do you respond to customer inquiries? \_\_\_\_\_

Do you currently have an email/phone list of all current/past clients? Yes /  
No

Describe your target (Ideal) customer/client  
\_\_\_\_\_  
\_\_\_\_\_

Do you currently have email marketing infrastructure? (Ex. Mailchimp) \_\_\_\_\_

How many days long is your current email drip campaign? \_\_\_\_\_

What marketing are you currently doing? What's working? What isn't?  
Working; \_\_\_\_\_  
Not Working: \_\_\_\_\_

What are you currently spending on marketing? \_\_\_\_\_

What is your current cost per lead? \_\_\_\_\_

What has been your best performing marketing? \_\_\_\_\_

What is your goal for this marketing campaign? \_\_\_\_\_

Where do you see your business in 1 year? \_\_\_\_\_ 5 years? \_\_\_\_\_

Are you on a team or independent? Team / Independent

How many deals have you done YTD? \_\_\_\_\_

What is the average price range you work in? \_\_\_\_\_

What's your average commission per transaction side?

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Do you follow any training system? (ex: Tom Ferry)

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Do you primarily work with buyers or sellers?

Buyers / Sellers / Both

Do you know what your contact to appointment ratio is?

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**Thats a wrap! Thanks and we look forward to speaking with you soon!**

