

# Onboarding Marketing

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\*All information provided will be held in the strictest confidence.

## Grant Technology Access

Please provide Moon Marketing **full admin access** to the following technologies you use (we won't make any changes or modifications without approval, but without full access we often can't get to areas we need).

Type	Examples	Your Vendor	Access Granted (Yes, No, NA)
Marketing Automation	HubSpot, Marketo		
CRM	Salesforce, Sugar		
Website	WordPress, Joomla		
Email Marketing	Constant Contact, Mailchimp		
Paid Advertising	Facebook, Google Adwords		
Analytics	Google Analytics, Databox		
Website Host	Go Daddy, Host Gator		
Project Management	Basecamp, Trello		
Other			

## List Service Providers

Type	Description	Your Vendor
Marketing Automation	Who manages your marketing automation software?	
Website Management	Do you work with someone/company for website copy/development?	
SEO	Do you work with a separate vendor for SEO?	
Content Writing	Who currently writes web copy, blogs, other content	
Graphic Designer	Who currently designs your website, graphics, brochures, etc?	
Videographer	Who currently creates and edits your videos?	
Paid Advertising	Who manages the ppc, publications, etc.?	
Social Media	Who does your social media?	
Email Marketing	Who does your email marketing?	
CRM	Who is in charge of managing the CRM?	
Events	Who plans any events you attend?	
Reports	Who is responsible for gathering sales and marketing reports?	

## Upload Documents

Please upload any relevant documents you have to the shared document management folder.

- Business and Strategic Plans
- Documented sales/marketing processes
- Business/Sales/Marketing Reports
- Buyer Persona Information
- Current brand elements (logos, colors, fonts, Office templates, etc.)
- Marketing content – blogs, ebooks, whitepapers, webinars, CTA's, anything else related
- Sales content – email templates, presentations, proposal examples, scripts, anything else sellers like to regularly use to communicate with prospects
- Any other related documents

## Answer Survey Questions

Please answer the following questions to the best of your ability. If you prefer, we can go through these together at our Kick-Off meeting. If you want to answer now, please continue...

- If you don't know the answer right now, leave blank and we can discuss later. We're here to help you answer the questions you don't know the answer to.
- If the question is answered in one of the documents above or in your web copy, write "skip."

## Business Questions

- Vision/Mission
  - Your [core values](#) (workforce characteristics, what you obsess about doing well)
  - Your core focus (purpose/passion, why are you in business?)
  - [Three uniques](#) – 3 things, when combined, make you different from any other company
- Last year and current year projected annual sales revenue
- Revenue goals 1 year, 3-year, 10-year
- What are your top business priorities right now?
- Who are your top competitors?
- Who is your target audience?
- What is your org chart?

## Marketing Questions

- What is your current content strategy and process for creation/publishing?
- What are you doing for social media?
- What is your current email marketing strategy and process for creation/publishing?
- What networking memberships/groups do you belong to? (*not* LinkedIn related)
- What events/tradeshows/conferences do you regularly attend?
- What blogs/magazines/newsletters do you regularly read?
- Are there any other things you do to market and sell your company?

- Do you have any processes or procedures in place for managing contact data/segmentation?

### **Sales Questions**

- What technology tools does your sales team currently use?
- How is your sales team currently structured (# of salespeople, inside/outside, hunters/closers, etc.)?
- Desired pipeline
- Average sale amount
- Average close ratio from lead to sale
- Average sales cycle length
- Customer lifetime value (prediction of net profit attributed to the entire future client relationship)
- List of triggers for people to buy (what problems are they trying to solve?)
- List of common sales objections/concerns (what holds prospects back from buying from you?)
- Where do most of your new customers come from (online searches, free trials, cold calling, referrals, etc.)?
- How strong are your CRM policies and procedures (do your salespeople and marketers diligently use the CRM or is it hit or miss?)

### **Data Questions**

- Is the contact information for everyone you want to sell/marketing to all in one source or spread throughout multiple sources (CRM, Outlook, spreadsheets, paper)?
- Besides the website, where do you get your contacts from (purchase lists, trade shows, conferences, prospect research)?