



## RAB Sample Client Needs Analysis Questions

These CNA questions are not meant to be used as a questionnaire with the client, but as samples to prepare your questions in advance of your first meeting with a prospect. Best practices for CNA meetings suggest you memorize as many questions as possible to keep your meeting conversational, but occasionally refer to your notes when you need a reminder.

### Company:

1. How long have you been in this business?
2. How did you get started?
3. If relatively new, what did you do prior to this?
4. What's most enjoyable about being in this business?
5. What's least enjoyable about being in this business?

### Products/Services:

1. Do you consider your products to be average quality? High-end? Low-end?
2. What are your best sellers? Worst sellers?
3. Anything you consider your specialty?
4. Anything you like to feature (maybe because of higher profit margin)?

### Customers:

1. Who are your current customers?
  - a. %Male? % Female?
  - b. Average age?
  - c. Average income?
  - d. Typical profession
  - e. Typical level of education
2. Who would you like them to be?
  - a. %Male? % Female?
  - b. Average age?
  - c. Average income?
  - d. Typical profession
  - e. Typical level of education
3. Has your client base changed in the last year?
  - a. If so, why?
  - b. Was this a good change? Why or why not?
4. Do you anticipate any changes in your business that would affect your current customer profile?
5. From how far away do your customers typically come to shop?
  - a. Are you satisfied with this?
6. What is the average amount a typical customer spends each time they shop your store?
7. How much is a customer worth? (Amount they spend + number of referrals)
8. How would a typical customer describe the experience of shopping at your store?
9. What is the single largest misconception non-customers have about shopping with you?

**Competition:**

1. Who are your biggest competitors?  
For each competitor:
2. Why do people shop there?
3. What are their primary competitive advantages?
4. What do they offer customers that you can't or won't?
5. Why do customers come to you?
6. What do you offer that your competitors can't/won't?
7. What is your single greatest competitive advantage?
8. What is your single greatest competitive disadvantage?
9. Do you anticipate any changes competitively? (New competition/old going out of business/new product lines, etc)

**Objectives:**

1. Is your business experiencing the kind of growth you need/want? If not, why?
2. Do you have a positioning statement?
3. What do you feel is your unique selling position?
4. What is your primary business image: low price, large inventory, service, etc.?
5. What would you want your overall image to be, if different from above?
6. Do you feel there are any misconceptions about you/your business that you would like to address?
7. Could you describe your single biggest sales and marketing challenge?
8. How are you actively addressing this challenge?
9. How would you like to see your business change over the next 12 months?

**Advertising:**

1. What media do you currently use?
2. Which do you use most often?

**For each medium:**

3. How often do you typically use this medium?
4. What do you like best about this medium?
5. What do you like least about this medium?
6. What would you change about this medium?
7. What is your typical average monthly investment in this medium?
  - a. What percent of your monthly advertising budget does this represent?
8. Do you utilize co-op?
9. Are you taking advantage of discretionary vendor support?
10. Dates and names of all major sales events
11. Two strongest sales events and why they are the most successful?

**Specific questions about Interactive:**

12. Are you advertising on the Internet?
13. What is your goal for your website? Branding? Direct response? Providing information? Building your customer database?
14. How pleased are you with your website's results?
15. Are you selling goods or services through your website?
16. What do you like best about your website?
17. What would you change about your Interactive efforts if you could?
18. What are you doing with your database?
19. How are you promoting your website?
20. Who handles your Internet advertising and other new media advertising?
21. What kinds of results have you found with your Internet advertising?
22. What new media are you using for advertising? E-mail marketing? Search? Mobile marketing?
23. Who serves your Internet ads?
24. Are you using rich media? Audio? Video? Flash? Animation?
25. What size ads do you prefer?
26. What kinds of sites get you the best results?

**Wrap-up:**

1. Are there any other areas we should discuss before I begin to prepare some detailed analysis and recommendations based on today's meeting?
2. As I am collecting research on your industry over the next few days are there any areas of special interest to you that I should research as well?
3. Are there any other individuals involved in making marketing and advertising decisions?
4. Do you have any advertising agency?
5. I'll have research and recommendations ready for your review on (date). Can we meet at (time) to discuss my findings?