



Cliff Quicksell Associates
www.QuicksellSpeaks.com

New Client Questionnaire

The goal of this document is to become more familiar with your business, how you run your business and to address areas of concern you have in growing your business and taking it to the next level. It may indeed include, working with accounts, internal issues, personal presentation challenges and the like. My goal is to help identify areas concern whereby I can be a direct contribution to the overall success of your business and YOU personally. As is with everything I do, your information is held in the strictest confidence.

Please take you time and answer as thoroughly as possible.

I look forward to working with you.

Cliff

Cliff Quicksell, MAS
President & CEO
Cliff Quicksell Associates

Name of the company (if applicable):

Contact name(s):

Address:

City:

State:

Zip:

Corporation:

Sub chapter "S":

Sole proprietor:

Sales representative:

IC (independent contractor):

Number of years in the promotional products business:

What did you do before this business?

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How did you get your start in the industry?

Tell me about your employees?

Administrative: (list each one)

How many?

Number of years with you?

Number of years in the industry?

Overall aptitude?

Attitude?

Sales: (list each one)

How many?

Number of years with you?

Number of years in the industry?

Overall aptitude?

Attitude?

Executive / Partners (other than you)

How many?

Number of years with you?

Number of years in the industry?

Overall aptitude?

Attitude?

What type of clients do you currently sell?

How many clients do you have in your database?

How many are current?

How many are inactive?

How do you currently market your company?

What is your average dollar amount sale?

What is your average gross profit?

What were your sales last year?

Last month?

Do you currently bill for your time?

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Where do you see yourself in five years from now?

Regarding your image, how do you want clients to remember you?

If I were to interview your best client what do you think they would say about you and your company?

Where do you see the industry in three years? Five years?

What do you like the most about this industry?

What do you like least?

If you had the power to change one thing about your business what would it be?

What challenges do you currently face?

- 1.
- 2.
- 3.
- 4.
- 5.

Please list the top five (5) topics you would like to address in order?

- 1.
- 2.
- 3.
- 4.
- 5.

Other Questions- Please be as lengthy and specific as possible...

1. What is it that you do...exactly, what is your USP?
2. What are you worth an hour if I were to have you just consult my company?
3. Do you charge for your time currently?
4. What is creativity?

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5. When a client says, give me a new idea, what is it they are looking for?
6. Explain your concept of a new idea.
7. Monetarily speaking, what is a new client worth to you? In other words, what would you be willing to pay for a new client?
8. What is the average attrition rate of your client?
9. What is the average spend of your top 20 clients (roughly)?
10. What is their spend frequency?
11. Give me five characteristics of your ideal client?
12. What do you think is most important to your clients?
13. If I were to interview your top five clients what would they say about you and your company? Are you sure?
14. What makes your company different?
 - a. List 5 things...5 things that make you the totally different from your competition?
15. What is the difference between, sales, advertising and marketing?
16. What are your expectations of working together?
17. Share with me the best experience you've had during your tenure in the business?

Any additional comment or insights:

Thank you in advance...

Cliff

Cliff Quicksell, MAS

President
Cliff Quicksell & Associates, Inc