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**Marketing Goal-Setting Questionnaire**

**We're on a mission to transform how we engage with you about our work.**At its core, marketing is a strategic tool aimed at achieving specific goals—most commonly, to boost your business. Understanding what you want to achieve helps us navigate towards your business goals more effectively. A well-defined, measurable goal isn't just about giving you a roadmap; it’s about setting clear expectations, marking our progress, and ensuring we're all on the same page. This clarity is crucial, as it enhances our ability to serve you with greater precision, accountability, and transparency.

The questions in this document are designed to dig deeper into your business, helping us gather the necessary insights to set a tangible, achievable marketing goal and outline the strategy to reach it. Your answers will help us understand the full scope of your marketing efforts, any systems you currently have in place for lead attribution, client dynamics, and business performance, guiding us to tailor our approach to fit your unique needs and objectives.

By taking the time to fill this out, you're not just giving us data; you're enabling a partnership that's built on understanding and tailored to bring tangible results to your business. Let's work together to pinpoint where you want to go and how we can get you there.

* ***The 6S Digital Team***

*Please fill out the below information:*

|  |  |
| --- | --- |
| Your Name: |  |
| Your Email: |  |
| Firm Name: |  |

Current Marketing and Technology Usage

1. Besides our services, what other marketing activities or channels are you currently using?

(e.g., Newsletters, SuperLawyers, FindLaw, Martindale Hubbell, etc.)

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1. What technology tools are you using for case management, lead management, or client relations?

(e.g., specific CRM software)

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Client Types and Client Distribution

1. Describe the typical case type that your firm works on.

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1. How many new clients retain your services in an average month (or year)?

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1. How many \*repeat\* clients retain your services in an average month (or year), if applicable?

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1. How do your cases typically distribute across your practice areas (percentage breakdown if possible)?

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1. What is the average value of a case/client in each of your core practice areas?

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1. Describe the average time from case acceptance, to payment, in each of your core practice areas.

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Ideal Customers and Potential Opportunities

1. How would you describe your typical client?

(Any information that may help us understand the demographic makeup of your clients and/or any common traits they tend to share)

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1. How does your \**ideal\** client differ from your typical client?

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1. Are there any legislative, societal, or technological changes you anticipate impacting your business in 2024?

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Business Performance and Goals

1. Please specify the gross revenue your business achieved in the last fiscal year.

(If you are unable to provide an exact number, an approximate estimate is OK. We will use this number to establish some baseline KPIs that we can use to measure our performance against.)

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1. Is this amount higher, lower, or the same, when compared to the fiscal year before it? Please specify the extent of the change, if applicable.

(Note: If there is something that you believe may have contributed to this result, please feel free to include that in your answer. This information will help us develop a more holistic understanding of the various external factors with potential to impact your business, such as “more referrals.”)

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1. What is your estimated revenue goal for 2024?

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1. What is your target number of new cases per month for 2024?

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1. Are there specific practice areas where you aim to see growth?

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1. What is the average (annual) ROI that you expect from your marketing investments?

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Client Acquisition and Conversion Challenges

1. Do you know where you get most of your clients from (e.g., referrals, “Google”, etc)? If so, can you please briefly describe your process for keeping track of this?

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1. How many leads do you typically reject in an average month?

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1. In an average month, how many qualified leads do you pursue that do not convert to clients?

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1. What challenges, if any, have you faced in converting leads into clients?

If you do not have any challenges with this, we'd love to know what has worked well for your business.

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Past Experiences and Other Insights

1. Reflecting on past marketing efforts (prior to working with our agency) what have you found to be most and least effective?

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1. Is there anything else you’d like us to know about your firm, as it relates to the topics covered or answers you’ve provided on this form?

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Thank you!

Thank you for providing these insights. Your responses will be instrumental in developing a digital marketing strategy that aligns with your firm's unique needs and goals for the upcoming year.