



Confidential Profile

Date: _____

Company Name: _____

Trade Name: _____

Incorporated Partnership Sole Proprietor

Your name and title: _____

Address: _____

(# / Street) (City) (Province) (Postal Code)

Telephone: _____ Fax: _____ E-mail: _____

Website: _____ Last update: _____

Business description: Manufacturer

Distributor

Retailer

Other _____

List your product groups and services (in order of importance):

- | | |
|---------|----------|
| 1 _____ | 6 _____ |
| 2 _____ | 7 _____ |
| 3 _____ | 8 _____ |
| 4 _____ | 9 _____ |
| 5 _____ | 10 _____ |

Name your target market(s). Rank in order of importance (if applicable). Check all that apply:

End users _____

Distributors _____

Manufacturers _____

Retailers _____

Other _____

Do you have a marketing plan? Yes No

If yes, please attach a copy to this document.

Total annual sales:

Product/Service	\$ Amount	%
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Current annual advertising/promotion budget: \$ _____

Person in charge of Ad./Prom. Budget: _____



By engaging the services of TM Marketing, your goals are to (check all that apply):

- Grow sales
- Grow market share
- Increase profits
- Create awareness
- Client acquisition
- Client retention
- Develop new distribution channel(s)
- Optimize your web presence
- Establish an e-commerce/e-Biz strategy

List your current marketing activities:	Satisfactory Results?	
	Yes	No
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

List your three most prominent competitors (in order of importance):

- 1 _____
- 2 _____
- 3 _____

Research and development are critical to continued growth. How would you describe your R&D efforts?

- Major focus, ongoing Dependant on suppliers Too costly Other

Clients base their buying decisions on 3 elements. Rank their motivation to deal with your firm in order of importance:

_____ Price _____ Quality _____ Service

Describe your network of clients:

	%		%
Local	_____	National	_____
Provincial	_____	International	_____

Sales structure is a vital part of your marketing activities. Which of the following do you use? (Check all that apply).

- Self Sales reps e-commerce Dealers Agents/Brokers Order Desk

Thank you for taking the time to reflect and providing TM Marketing with this essential information. You have taken the first step on the path to achieving your goals that we will develop together.

How did you hear about TM Marketing?
