



A-Client Profile

Goals [1]

What is the problem you are trying to solve? (1 sentence)	
Primary SMART GOAL	
Secondary SMART GOAL (optional)	
Big Picture Objective (Personally)	
Big Picture Objective (Business)	

About Your Business [2]

What do you do?	
How do you do it differently than your competitors?	
Why do you do it this way?	
Why is that important to you?	
If your brand was a person, what words would you use to describe them?	
Which of these best accurately describes your sales process?	
Who are your main competitors?	
What are the top 5 questions you receive from your clients?	

Focus Areas of Campaign [3]

Is there a key message or focus to this campaign? (Optional)	
Which products/services would you like to focus on?	
Which products/services should be excluded?	
Geographies for Campaigns	
Geographies for Ads	
Geographies to Exclude [4]	
What is your existing marketing mix?	

A-Clients [5]

Group					
B2B or B2C?					
Catalyst/Buying Situation					
Beliefs/Attitudes					
Hobbies/Interests					
Purchase Frequency					

Geography				
Income				
Age				
Gender				
Marital Status				
Children				
Education Completed				
Preferred Device (nice to know if available)				
How do you want them to reach out to you?				
Want-to-know moments				
What kinds of questions are people asking that would lead them to you? (Think researching a solution to a problem they are experiencing)				
Want-to-go moments				
(near me, directions to, looking for physical products to see i.e. showroom)				
Want-to-do moments				
(how to, tutorials, DIY) [6]				
Want-to-buy moments				
(searching brands, price, reviews, specific product SKUs etc.)				

B2B Only [7]

Roles i.e. Roles we want to get in front of in the organization				
Organizations i.e. types of companies that they want to get in front of				
Websites i.e. Websites for these companies				
Company Size				
Company Industry				
Company Business Type				
Years in Business				

Business Chassis

Increase Percentage	10.00%	Increase	10.00%
Leads	10	Leads	11.00
Conversion rate	30.00%	Conversion rate	33.00%
Number of customers	\$3	Number of customers	3.63
Frequency of purchase/year	\$2	Frequency of purchase/year	2.20
Lifetime of Customer in Years	\$5	Lifetime of Customer in Years	5.50
Avg Sale	\$10,000.00	Avg Sale	\$11,000.00

Revenue/year [8]	\$60,000.00	Revenue/year	\$87,846.00
Gross Margin %	35.00%	Gross Margin %	38.50%
Gross Margin \$	\$21,000.00	Gross Margin \$	\$33,820.71
Lifetime Value in Margin of 1 customer	\$35,000.00	Lifetime Value in Margin of 1 customer	\$51,243.50
Lifetime Value of a Lead	\$10,500.00	Lifetime Value of a Lead	\$16,910.36

**Key Messages
(To Be Completed By Ops Team) [9]**

Key Messages (What theme runs throughout the moments?)				
Recommended Channels				
Sample CTAs				

Other Notes



Goals [10]

What is the problem you are trying to solve? (1 sentence)	We want to increase and maintain the number of test drives booked over the year, even during slower months.
Primary SMART GOAL	Go from 15 test drives booked per month to 20 test drives booked per month by December 2018.
Secondary SMART GOAL (optional)	Create a website that accurately portrays our professionalism and experience by April 2018.
Big Picture Objective (Personally)	Take my family on a vacation to Greece!
Big Picture Objective (Business)	Create a dealership that I can pass down to my sons.

About Your Business [11]

What do you do?	We sell & service cars for people who believe in getting a great experience & value for their dollar.
How do you do it differently than your competitors?	Our average staff lifetime is 10 years which gives our clients a knowledgeable & familiar face to build a relationship with.
Why do you do it this way?	We believe in a no b/s, honest experience that starts with creating a family of staff members.
Why is that important to you?	Purchasing a car is supposed to be fun! We want to make sure that our guests can feel comfortable and confident in us even after they have driven off the lot.
If your brand was a person, what words would you use to describe them?	Like a mum: stern but fair and always makes you feel welcome
Which of these best accurately describes your sales process?	Consultative
Who are your main competitors?	Wayne Pittman Ford, Honda
What are the top 5 questions you receive from your clients?	Do you have a car that fits 3 carseats? Should I make buying a car that is electric a top priority? What is the safety rating? Do winter tires make a noticeable difference? How will salted roads impact my car in the winter?

Focus Areas of Campaign [12]

Is there a key message or focus to this campaign? (Optional)	Book a test drive
Which products/services would you like to focus on?	Current year model cars - increased focus on family-oriented vehicles like Toyota RAV4, Corolla and Camry
Which products/services should be excluded?	Used vehicles
Geographies to target	Kitchener
Geographies to exclude	Don't bid on any other geographies - dealerships are assigned a specific region to advertise in
What is your existing marketing mix?	Radio and organic Facebook posts

A-Clients [13]

Group	Pregnant Polly	Outdoorsman Ollie	Retired Ruth	Group Name 4	Group Name 5
B2B or B2C?	B2C	B2C	B2C		
Catalyst/Buying Situation	We're pregnant! Time to get ready for the baby with a safe, practical vehicle.	I need a car to hold my bikes, my dog, my wife and my newborn.	My previous car hit 400,000km and the service centre advised me to start looking for a new vehicle.		
Beliefs/Attitudes	I believe in paying more for something that provides safety & quality.	I want a vehicle that is specific to me and the kind of lifestyle I choose to live.	I prioritize practical over aesthetics. I want to invest things that will last.		
Hobbies/Interests	Spending time with family & friends on weekends. Dog & board game lover.	Cross-country mountain biking with my wife, camping, cottaging and spending time on the road.	I mainly use my car for in-town errands and visiting my kids out of town.		

Purchase Frequency	Lease once every 6 years.	Purchase once every 15 years.	Purchase once every 20 years.		
Geography	Guelph	Kitchener	Kitchener		
Income	70-90K	80-120K	50K		
Age	25-34	35-44	65+		
Gender	Female	Male	Female		
Marital Status	Married or Domestic Partnership	Married or Domestic Partnership	Single		
Children	1	1	2		
Education Completed	Bachelor's Degree	Master's Degree	Bachelor's Degree		
Preferred Device (nice to know if available)	Mobile	Mobile	Desktop		
How do you want them to reach out to you?	Call to book a test drive	Call to book a consultation appointment	Come to the dealership		
Want-to-know moments What kinds of questions are people asking that would lead them to you? (Think researching a solution to a problem they are experiencing)	Top 10 cars for families	3-bike bikeracks for SUV	Brings vehicle in for service with concerns that her vehicle was at the end of its life		
Want-to-go moments (near me, directions to, looking for physical products to see i.e. showroom)	Where can I test drive a RAV 4 in Kitchener?	Dealerships that offer custom car consultation in Kitchener	Car service near me		
Want-to-do moments (how to, tutorials, DIY)	How to buckle in a car seat in a 2018 RAV4 ?	Mounting bikes using THULE Bikerack on Toyota 4Runner	Should I spend money on replacing the transmission on my car with 400,000km?		
Want-to-buy moments (searching brands, price, reviews, specific product SKUs etc.)	What is the safety rating of a RAV 4? Kitchener RAV 4 inventory	Toyota 4Runner Reviews	Kitchener Toyota Corolla 2018		
B2B Only [14]					
Roles i.e. Roles we want to get in front of in the organization					
Organizations i.e. types of companies that they want to get in front of					
Websites i.e. Websites for these companies					
Company Size					
Company Industry					
Years in Business					
Business Chassis					
Leads	180				
Conversion rate	80%				

Number of customers	144
Frequency of purchase/year	0.067
Avg Sale	\$20,000
Revenue	\$3,600
Gross Margin	10%
Lifetime of Customer	60
Lifetime Value	

Key Messages
(To Be Completed By Ops Team) [15]

Key Messages (What theme runs throughout the moments?)				
Recommended Channels				
Sample CTAs				

Other Notes



Goals [16]

What is the problem you are trying to solve? (1 sentence)	Due to the growth of the business, I don't have as much time to focus on acquiring new customers. I am too busy maintaining the organization of employees, orders, and existing customer needs.
Primary SMART GOAL	Go from 1.5% Conversion Rate to 2.5% Conversion Rate from Paid Traffic
Secondary SMART GOAL (optional)	
Big Picture Objective (Personally)	To spend more time at the cottage with the family, and not have to worry that leads are slowing down.
Big Picture Objective (Business)	Maintain the lead generation system that can be repeatable year over for the next 3 years with optimized improvements.

About Your Business [17]

What do you do?	We provide people a service - we have two sides of the business, replacement of windows and new construction for windows and doors (ex. B2B: We replace and install bulk sets of windows for commercial buildings). We provide a design on the windows and the entire house.
How do you do it differently than your competitors?	<ul style="list-style-type: none"> - We provide a service that gives the home owners the ability to talk to professional window and door people in an environment where they get to see product - Industry has typically been 'hook & ladder' where people show from a brochure. We have a big beautiful warehouse with professional experience - A lower-pressure buying experience - yesterday I told someone, "You don't even need windows" - We own the showroom - some stores lease a unit where we have an investment in the region - gives the customer the insurance we will still be here 10 years from now
Why do you do it this way?	<ul style="list-style-type: none"> - We never really did it how everyone else has done it, in the old days everybody used to advertise sales, we've always given people the best price - Some people in our industry have sales all the time so what is the real price? - Our customers can get a great price anytime - We want the customer to have the best value and the best experience - The customer has the most ultimate options (pricing, style, material)
Why is that important to you?	<ul style="list-style-type: none"> All of the owners & salespeople live in the region we work - I walk into the grocery and I can look my customers in the eye and know we did a good job - We live and work here, we made friends with our customers, we're in a long term strategy - We can go out and be proud of our company in what we do - Our peers look up to us as a thought leader (ex. we have a special computer system) - We're on the forefront of a lot of things
If your brand was a person, what words would you use to describe them?	<ul style="list-style-type: none"> - Trustworthy - Salt-of-the-earth - Traditional - Loyal
Who are your main competitors?	Ridley Windows, Givarian Windows
What are the top 5 questions you receive from your clients?	<ul style="list-style-type: none"> - What are the best windows for my home & lifestyle? - How long is the renovation going to take? - What are the newest trends for windows? - Are bay windows bad for energy costs?

Focus Areas of Campaign [18]

Is there a key message or focus to this campaign? (Optional)	Bavarian windows provides custom consultation on window and door choices.
Which products/services would you like to focus on?	New window and door estimates & installation.
Which products/services should be excluded?	Window and door repair
Geographies to target	Kitchener, Waterloo, Guelph
Geographies to exclude	Mississauga, Milton, Toronto
What is your existing marketing mix?	AdWords, Radio, Newspaper, Yellowpages

A-Clients [19]

Group	Doctor Dave	Tech Sector Ted	Renovator Randy	Group Name 4	Group Name 5
B2B or B2C?	B2C	B2C	B2B		
Catalyst/Buying Situation	Old doors are getting drafty	New home purchase for growing family	Old window supplier is unreliable		

Beliefs/Attitudes	Don't fix something that isn't broken. I need transparency about pricing and value. Comparison shopping is the best approach.	Spending more is well worth it if the quality is there. Leave jobs to the experts. I want safety and security for my new family.	I need fast, reliable service. A good business relationship is important to me. I need a wide assortment of available products. I've been burned in the past by suppliers.		
Hobbies/Interests	Golf, community events, gardening	Cycling and hitting the gym, spending time with family, growing career	Watching hockey, taking sports car to the track, fishing		
Purchase Frequency	Once every 10 years	Once every 7 years	1-3 times/year		
Geography	Guelph, Puslinch	Kitchener-Waterloo, Guelph	Waterloo Region		
Income	\$200,000+	\$100,000+	\$100,000		
Age	55-64	35-44	45-54		
Gender	Male	Male	Male		
Marital Status	Married or Domestic Partnership	Married or Domestic Partnership	Married or Domestic Partnership		
Children	2	1	None		
Education Completed	Professional Degree (MD, JD, etc.)	Bachelor's Degree	Trade/Technical/Vocational Training		
Preferred Device (nice to know if available)	Tablet	Mobile	Desktop		
Want-to-know moments What kinds of questions are people asking that would lead them to you? (Think researching a solution to a problem they are experiencing)	When do doors need to be replaced?	Are eco-friendly windows worth the extra investment?	Commercial window companies that offer delivery		
Want-to-go moments (near me, directions to, looking for physical products to see i.e. showroom)	Where can I see exterior door samples?	Eco-friendly window stores Near Me	Local commercial window suppliers		
Want-to-do moments (how to, tutorials, DIY)	How to fix a drafty door	How can I reduce energy costs?	N/A		
Want-to-buy moments (searching brands, price, reviews, specific product SKUs etc.)	KV Fiberglass Entrance Door price	Marvin Eco-friendly door Guelph	Marvin Windows Reviews		
B2B Only [20]					
Examples (Roles, Organizations, Websites) [21]			Business owner		
Company Size			30-50 people		
Company Industry			Home Builder/Renovator		
Years in Business			30+		
Existing Channels			Referral		
Business Chassis					
Leads					
Conversion rate					
Number of customers					
Frequency of purchase/year					

Avg Sale	
Revenue	
Gross Margin	
Lifetime of Customer	
Lifetime Value	

Key Messages
(To Be Completed By Ops Team) [22]

Key Messages (What theme runs throughout the moments?)					
Recommended Channels	Email marketing, blogging, Facebook organic posts and ads, SEO investment, web maintenance				
Sample CTAs					

Other Notes

[1] The goals section helps frame the overarching strategy of the marketing campaign. Try to be as specific as possible.

[2] The "About Your Business" section provides helpful information so that our team understands how your business is differentiated from competitors. It helps our team understand why you do what you do (your motivations).

[3] This is your opportunity to tell us which area of your business you would like to focus this marketing campaign on. Please be as specific as possible.

[4] The "Buyer Personas" section is used to help our team understand your target audience groups, including their buying situations, purchase journey and common characteristics. For example, if you ran a Staples Store, a Buyer Persona group could be teachers who are looking to purchase supplies for their classroom. This group of people share a common buyer journey and common characteristics.

The better we know your target audience groups, the better we can actively target them to help achieve your campaign goals.

[5] The "Buyer Personas" section is used to help our team understand your target audience groups, including their buying situations, purchase journey and common characteristics. For example, if you ran a Staples Store, a Buyer Persona group could be teachers who are looking to purchase supplies for their classroom. This group of people share a common buyer journey and common characteristics.

The better we know your target audience groups, the better we can actively target them to help achieve your campaign goals.

[6] Please add in the required fields only if you are targeting Business-2-Business customers.

[7] Please add in the required fields only if you are targeting Business-2-Business customers.

[8] *Only to be completed by the operations team

[9] *Only to be completed by the operations team

[10] The goals section helps frame the overarching strategy of the marketing campaign. Try to be as specific as possible.

[11] The "About Your Business" section provides helpful information so that our team understands how your business is differentiated from competitors. It helps our team understand why you do what you do (your motivations).

[12] This is your opportunity to tell us which area of your business you would like to focus this marketing campaign on. Please be as specific as possible.

[13] The "Buyer Personas" section is used to help our team understand your target audience groups, including their buying situations, purchase journey and common characteristics. For example, if you ran a Staples Store, a Buyer Persona group could be teachers who are looking to purchase supplies for their classroom. This group of people share a common buyer journey and common characteristics.

The better we know your target audience groups, the better we can actively target them to help achieve your campaign goals.

[14] Please add in the required fields only if you are targeting Business-2-Business customers.

[15] *Only to be completed by the operations team

[16] The goals section helps frame the overarching strategy of the marketing campaign. Try to be as specific as possible.

[17] The "About Your Business" section provides helpful information so that our team understands how your business is differentiated from competitors. It helps our team understand why you do what you do (your motivations).

[18] This is your opportunity to tell us which area of your business you would like to focus this marketing campaign on. Please be as specific as possible.

[19] The "Buyer Personas" section is used to help our team understand your target audience groups, including their buying situations, purchase journey and common characteristics. For example, if you ran a Staples Store, a Buyer Persona group could be teachers who are looking to purchase supplies for their classroom. This group of people share a common buyer journey and common characteristics.

The better we know your target audience groups, the better we can actively target them to help achieve your campaign goals.

[20] Please add in the required fields only if you are targeting Business-2-Business customers.

[21] Examples:

Role - Roles we want to get in front of in the organization i.e. Logistics Coordinator

Organizations - types of companies that they want to get in front of

Websites - websites for these companies

[22] *Only to be completed by the operations team