



Pat Millfelt, Serendipitous Connections Marketing
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Marketing Questions to be completed prior to consultation: Please print, complete and return to Pat Millfelt as attachment in word doc to pmillfelt@comcast.net before consultation. Thank you.

Company Name: _____
Your Name: _____
Phone: _____ **cell:** _____
Email: _____
Website: _____
Address: _____

Description of Services:

Current employees/business partners/strategic partners-please identify each and give contact info for those involved:

Company History:

Company Selling Points (What separates your company from your competition?):

Personal and Professional References: names, emails, phone #:

Affiliations/groups/clubs/networking opportunities:

Business Strengths:

Business Opportunities for Improvement:

Business Goals:

What have you done for Marketing prior to now?

What has been most successful?

What has not worked?

Where would you like to go from here?

Marketing Budget?

What does your current marketing plan cover? Check all that apply.

- Internet**
 - Advertising: if so where:**
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- Sales Promotion**
 - Direct Mail**
 - Public Relations/Publicity**
 - Resource Fairs/trade shows**
 - Other (describe)**
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I would like to see your current brochure, flyers, business cards, and know where you currently advertise, see a sample, etc. I will also need your logo if contracting to be sent in a jpeg via attachment in an email.

Is your marketing budget ready, and if so, what direction have you taken for the future?

Describe precisely your target market:

What time frame are you considering at this time? Standard start up plan is for 3 months.

Marketing Strategies with Serendipitous Connections may include:

Consultation, preliminary planning-fee based on client needs.

Fact finding, plan presentation, competitive analysis, 3 month strategic visioning plan-fee based on client needs.

Implementation, networking, partnership development, social media platform, formal introductions to connections, development of contact data base, mailings, weekly updates and bi-weekly invoicing-fee based on client needs.

*** *Event planning* calendar is extra. Call for details and survey. 715-338-0262**

*****Deposit is required*, implementation plan requires minimum of 3 hrs/wk for the first month, 2 hrs/wk for the second & third months. Contract ends after 3rd month, unless review occurs and new goals are discussed. Monthly retainer suggested if contract not extended and wishing for continued marketing srvs.**