

The “Clear Purpose” Questionnaire

Your website, blog, newsletters, and social media all serve a purpose. Reaching your target market, engaging with clients, and increasing your business growth all come from clear research, knowledge, and strategies applied to the materials you use. This Q&A sheet can help guide you in the discovery process and decision-making criteria behind great business content.

Focus Factors: What do you want your visitors or prospects to do?

Check all that apply, then circle the main purpose:

- Search your inventory or see product options
- Buy your products via ecommerce/shopping cart
- Come to your retail store (bricks and mortar)
- Ask you about your services (become a qualified lead for your business)
- Sign up for a free trial or newsletter
- Find your website via search engines
- View a digital portfolio/work samples
- Sign up to become a member of a group
- Access a library of information
- Participate in a forum of like-minded people
- View and/or order product demonstrations, seminars, training modules
- Other _____

Marketing and Sales Goals: Audience and Intent

Check all that apply, then circle the main purpose:

- Cultivate new clients
- Focus on selling more programs/products/services to existing clients
- Grow specific programs/product lines/service offerings
- Launch a new product/program/service
- Reinforce/support other marketing efforts
- Other _____

The Competition: Who, What, Where

Who else offers similar products, programs, or services?

List your top 3 competitors for the specific project you are focusing on right now:

1.

2.

3.

Your Reference Library: Existing Resources

What materials do you have on hand to use as a resource in moving forward?

Are they current, can they help with this project, or do they need an update?

- Your website
- A project outline with what you want and what you envision
- A business plan
- A marketing plan
- Product/program/service list—everything your company makes/does/offers
- Current marketing and media materials
- Brand guidelines

Customer Insights: Knowing Your Target Market

Describe your ideal target market in demographics, such as gender, age, income, education, and geographic area:

Describe your ideal target market in psychographics. Are there cultural considerations, or shared values, interests, hobbies, or goals essential to this customer base?

What inspires and motivates this audience emotionally? Or is your product/service very much a spreadsheet-ready numbers-crunching solution for them? Where do you think the biggest “inner factor” connection is for them?

What keeps them up at night? What pain are you alleviating or solving?

What solution are they looking for? What do you help them do?

What customer insights do you have on hand, through research or feedback?

Are there intuitive hunches you have about what your customers want that you’d like to test in some way?

Secret Sauce: Why You?

List the key **features** of your product or service. This includes things like what a program consists of, how people access it, and what techniques you use. For products, this includes what they're used for and some type of physical description.

Wow, you can see that's not going to get you all the way to a sale. Those are important nuts and bolts, but now list the **benefits** of your service or product. What problems are solved, goals are reached, what's the dream scenario you put within your customers' reach?

What's the main unique benefit or solution that only your product or service can provide? This is often called the USP, or unique selling proposition. What sets you apart in an exceptional way that others can't duplicate or offer? It could be things like convenience, price, quality, delivery mode, or specialized systems, but here's the deal: it's not likely to be all of those!

Let's put it a different way. What's the Big Promise? What are you promising your product or service can do? What is the single most important benefit message or offer for your target audience?

The Conversation:

What is the support for the key message, the proof? Do you have testimonials, reviews, case studies, endorsements, or data sets?

What are the obstacles and objections that need to be overcome? Are you asking someone to switch brands, try something new, or try something unknown?

Does your audience already know you or are you speaking with new people? What is the degree of engagement they already have with your business?

What's the tone of voice that you're speaking in? Is it serious, lighthearted, fun, pragmatic?

What is the offer—the reason to buy right now? Do you have a special program or product that is only offered a few times a year? Is there a limited-time offer?

What is your call to action? Is it to order something, inquire about something, or sign up for something?

How can the audience get in touch with you? Website, email, phone number, physical store; how do they stay in contact?

In the copywriting world, we call this Q&A document a “client brief”, and it’s designed to bring together your knowledge, materials, and goals in a focused way. I hope it’s helpful for you in your project planning and execution.

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