



Marketing and Strategic Needs Assessment Form

Return to:

Business Valuation Resources, LLC
1000 SW Broadway, Suite 1200
Portland, OR 97205
Fax: (503) 291-7955
Attn: Client Development Services



Marketing and Strategic Needs Assessment Form

About BVR (because you need to know).

There are never enough hours in the day to focus on marketing your firm. While we can't promise to move the hands of time, BVR can help you position your firm so that the precious hours you do have to devote to marketing will drive better results.

BVR has had a hand in every facet of the business valuation industry for 11+ years. We know the lingo, we know your competition, and we know how your firm can benefit from a marketing plan that guarantees success. Fill out this marketing and strategic needs assessment and you're on your way to a winning strategy!

About You:

Name: _____ Title: _____

Firm: _____

Address: _____ Suite, Floor, Apt.: _____

City, State, Zip: _____ Email: _____

Phone: _____ Website URL: _____

If your company does not have a Website, are you interested in BVR helping you construct one? ☐ Yes ☐ No

About Your Firm:

Briefly describe your organization and what differentiates you from your competitors:

Does your BV practice focus in a particular industry (i.e., technology, medical, etc.)? ☐ Yes ☐ No

If yes, please list the industry (or industries): _____

Length of time in business: _____ years Number of employees: _____

Do you have a dedicated marketing department? ☐ Yes ☐ No

Do you have a dedicated marketing budget? ☐ Yes ☐ No If yes, what is the available budget? _____

Do you currently have a brief mission statement? ☐ Yes ☐ No

If yes, what is it? _____

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About Your Needs:

What are your primary goals and objectives for your marketing efforts? (mark all that apply)

- ☐ To build business and increase sales ☐ To increase marketing and product/services branding
☐ To generate business leads/requests for information ☐ To support existing marketing efforts
☐ Other (please list): _____

Do you have a marketing/strategic plan? ☐ Yes ☐ No

If yes, please explain: _____

If no, are you interested in working with a BVR consultant to develop one? ☐ Yes ☐ No

Do you currently have a logo? ☐ Yes ☐ No

If no, would you be interested in BVR creating a logo for you? ☐ Yes ☐ No

If yes, would you be interested in BVR revamping it? ☐ Yes ☐ No

Do you currently have a prospect database? ☐ Yes ☐ No

If yes, approximately how many prospects do you have? _____

If no, are you interested in BVR helping you create a prospect database? ☐ Yes ☐ No

Do you currently have a client newsletter? ☐ Yes ☐ No

If no, would you be interested in BVR creating one for you? ☐ Yes ☐ No

If yes, do you post it on your website? ☐ Yes ☐ No

Do you currently have business cards, letterhead, envelopes, etc.? ☐ Yes ☐ No

If no, would you be interested in BVR creating stationery for you? ☐ Yes ☐ No

If yes, would you be interested in BVR enhancing it for you? ☐ Yes ☐ No

Do you currently have print marketing collateral? ☐ Yes ☐ No

If no, would you be interested in BVR creating pieces for you? ☐ Yes ☐ No

If yes, would you be interested in BVR critiquing your current pieces? ☐ Yes ☐ No

Do you currently organize any special events or seminars regarding business valuation? ☐ Yes ☐ No

If no, would you be interested in licensing a seminar for lawyers from BVR? ☐ Yes ☐ No

If yes, would you be interested in BVR's seminar service? ☐ Yes ☐ No

Do you currently send marketing e-mails? ☐ Yes ☐ No

If no, would you be interested in BVR creating marketing emails for you? ☐ Yes ☐ No

If yes, would you be interested in BVR enhancing the emails for you? ☐ Yes ☐ No

Please mark all the services you would be interested in to attain your primary marketing goals and objectives for your firm:

- | | | |
|---|---|--|
| <input type="checkbox"/> Marketing Strategy | <input type="checkbox"/> Brand Development/Corporate Identity | <input type="checkbox"/> Web Development (content, design, etc.) |
| <input type="checkbox"/> Online Advertising | <input type="checkbox"/> Email Marketing | <input type="checkbox"/> E-Newsletter |
| <input type="checkbox"/> Client Newsletter | <input type="checkbox"/> Client Letters | <input type="checkbox"/> BV Seminar for Clients (i.e., lawyers) |
| <input type="checkbox"/> Direct Mail (brochure, etc.) | <input type="checkbox"/> Stationery (biz cards, letterhead, etc.) | <input type="checkbox"/> Tradeshow Displays |

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Business Valuation Resources, LLC

Ph: (888) 287-8258 or (503) 291-7963

Web: www.BVResources.com