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| --- | --- |
| Contact Information |  |
| Company: |  |
| Main Contact: |  |
| Contact Phone: |  |
| Contact Email: |  |
| Company URL: |  |

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| --- | --- | --- | --- |
| Social Media |  | | |
| Facebook | Facebook link: |  | |
|  | | |
| LinkedIn | LinkedIn link: |  | |
| LinkedIn Company Page Name: |  | |
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|  | | |
| Instagram | Instagram link: |  | |
| Instagram Username: |  | |
|  | |
|  | | |
| Pinterest | Pinterest link: |  | |
| Pinterest Username: |  | |
|  | | |

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| Company Information | |
| PRIORITIES | What are your top 3 Sales Priorities and top 3 Marketing Priorities? |
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| INTEGRATIONS | Do you use any business softwares or tools (CRM, social, email platforms etc.)? |
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| Products/Services | What products and services do you offer? |
|  |
| PROSPECTS & CUSTOMERS | Who is your ideal prospect or customer? (Men? Women? Ages? Career? Industry? And so on…) |
|  |

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| --- | --- |
| Metrics | |
| KPI’s | What Key Performance Indicators (KPI’s) do you currently track? (leads, registrations, social media interactions, website visits, etc.) |
|  |
| Challenges | What are your biggest businesses challenges you are looking to solve? |
|  |
| Competitors | What competitors do you have in the area? |
|  |
| Goals | What are your SMART sales/business goals for 2021? (Be specific, measurable, attainable, relevant, time-based) |
|  |