

# Jonathan Coates LLC

Consulting Diagnosis

CLIENT NAME \_\_\_\_\_

## Background & Statistics

Years In Business \_\_\_\_\_

Sales Trend: YTD: \$ \_\_\_\_\_ Last Year: \_\_\_\_\_ This Year: \_\_\_\_\_

Income Trend YTD: \$ \_\_\_\_\_ Last Year: \_\_\_\_\_ This Year: \_\_\_\_\_

### How Client Got Into Business

*Notes*

### Reasons Client Got Into Business

*Notes*

## Size of Business

- a) Relative to goals of Client i.e. Satisfactory? Not big enough, fast enough?
- b) Very disappointing?\*
- c) Relative to most successful businesses in its industry, profession or category?
- d) Relative to direct competition?
- e) Relative to potential?

### *Notes*

\*If unsatisfactory, to what does Client attribute the gap between the size of the business he desires and size of business he has (ranked by greatest impact)

(1) \_\_\_\_\_

(2) \_\_\_\_\_

(3) \_\_\_\_\_

(4) \_\_\_\_\_

## “BIG PICTURE” Questions

What does the client want his business to “look like” in 2 Years, 5 years, 10 years?

*Notes*

Specific differences, improvements, changes hoped for in 2-3 years or less?

- a) Re. sales?
- b) Re. income?
- c) Re. size? Expansion?
- d) Re. staff?
- e) Re. customers/clients
- f) Re. day to day business life?
- g) Re. family life
- h) Re. vacations?
- i) Other?

*Notes*

**The Magic Genie Question:** if the genie appeared and gave you three wishes, so you could change three things in or about your business instantly, with no effort or cost, what would these changes be? (As specific as possible)

Notes

**The Rich Uncle Question:** if a rich uncle arrived and gave you \$100,000.00 to spend on advertising, marketing, promoting or otherwise expanding your business, what would you do with it?

*Notes*

## **MARKET (S)**

(The 'Who' of business ... who is the customer..... where are they , how do they think? What "bait" is most attractive to them?)

**Describe Client's Market**

Mass     Target     Consumer     B2B

*Notes*

**Client's Personal Affinity With Market (from Client's "Story")**

*Notes*

**Discuss Client's Belief System about his Market, Customers, Clients, Patients and Prospects.... What are the 5 most important "facts" Client believes about his Clientele?**

*Notes*

**What has changed most in the customer's lives or about the customer's behaviours in past several years?**

*Notes*

**What does the Client believe or know about his customers, with regard to....**

(a) Price. Egs: Very price conscious or price irrelevant, price shoppers, etc.)

(b) Quality.

(c) Service.

(d) Convenience

(e) Impulsive or Analytical

(f) Geographic Limitations

*Notes*

**What are the Client's customer's main, present concerns, fears, worries, frustrations, hopes, desires? (What keeps them up at night?) What irritates them? Etc.?)**

*Notes*

**What are the best things about Client's customers?**

**What are the worst things about Client's customers?**

*Notes*

**Provide the most detailed profile of the Client's present customer that you can.**

*Notes*

**Provide the most detailed profile of the ideal customer the Client would most like to attract?**

*Notes*

**Clients' perception of size of market, his share of market, his potential for growth...**

*Notes*

## **Message**

How does the Client describe his business?

*Notes*

**Features & Benefits of Clients business, products, services, expertise, etc.**

<i>Feature</i>	<i>Benefit</i>
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____
6. _____	_____
7. _____	_____

**Unique Selling Proposition, “elevator speech” (if any)**

*Notes*



**Research on Competition and/or Similar Businesses, products, Services**

\_\_\_ File on each Primary Competitor

\_\_\_ Mystery Shop/ play prospect with competitors

\_\_\_ Difference between client & competitors

*Notes*

**Headlines - from Client's advertising and marketing materials**

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**Client's Standard Offer(s)**

*Notes*

## **Proof**

Pictorial Proof

Customer Testimonials

Expert Testimonials

Celebrity Testimonials

Reference Proof (Media)

Demonstration Proof

Other: \_\_\_\_\_

*Notes*

## **How does the client use and present proof**

In ordinary literature

In book or booklet

In audio media

In video media

On web site

Other: \_\_\_\_\_

## **Guarantees and warranties, risk reversal**

*Notes*

## **ADDITIONAL REVIEW OF CLIENT'S ADS BROCHURES, ETC.**

*Use 'Advertising Critique' as a guide.*

## **The 5 Steps**

**NEED/ DESIRE/ MOTIVATION OF CUSTOMER**

*Notes*

**THE “GENERAL” THINGS THAT FULFILLS THE NEED / DESIRE (ALL OPTIONS FOR ‘SCRATCHING’ THE ITCH’)**

*Notes*

**WHY IS CLIENT’S ‘THING’ THE BEST OF THE OPTIONS?**

*Notes*

**HOW DOES CLIENT PRESENT AND JUSTIFY PRICE?**

*Notes*

**HOW DOES CLIENT MAKE CASE FOR IMMEDIATE ACTION?**

*Notes*

# Media

## Media currently used by Client

IF CONSUMER MARKETER

Newspaper Advertising

Magazine Advertising

Client's Own Direct mail

Radio Advertising

TV Advertising

30, 60, 90-sec commercials

infomercials

Internet

Meta Platforms (IG, FB, Whatsapp etc)

Google Properties (Adsense, YouTube, etc)

Microsoft Properties (Linkedin, Bing, Ads ect)

Tiktok

Advertises on other sites

Email (Display Ads, Promotions tab etc)

Other:

800#/Recorded Messages

Trade Shows

Seminars

Speaking

Publicity

Customer Newsletter

Referral programs

## IF BUSINESS TO BUSINESS

\_\_\_Newspaper Advertising

\_\_\_Magazine Advertising

\_\_\_Client's Own Direct mail

\_\_\_Radio Advertising

\_\_\_TV Advertising

\_\_\_30, 60, 90-sec commercials

\_\_\_infomercials

\_\_\_Internet

\_\_\_Meta Platforms (IG, FB, Whatsapp etc)

\_\_\_Google Properties (Adsense, YouTube, etc)

\_\_\_Microsoft Properties (Linkedin, Bing, Ads ect)

\_\_\_Tiktok

\_\_\_Advertises on other sites

\_\_\_Email (Display Ads, Promotions tab etc)

\_\_\_Other:

\_\_\_800#/Recorded Messages

\_\_\_Trade Shows

\_\_\_Seminars

\_\_\_Speaking

\_\_\_Publicity

\_\_\_Customer Newsletter

\_\_\_Referral programs

**Discuss experience with different media**

What is Client relying on now?

What has Client experimented with in the past?

What has Client never used?

What does he rank as effective or ineffective?

*Notes*

**Expenditures** - list each media used and dollars expensed on it (year or mo.)

_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____
_____	\$ _____

## **Budget...**

What is the total spent per year/ month on media? \_\_\_\_\_

How does that number relate as percentage to present gross sales? \_\_\_\_%

How does that number related to gross sales goal? \_\_\_\_%

How does each above listed item's cost as percentage of gross sales relates to its

Contribution to gross sales?

What is the ROI on each above listed item?

!!! - what don't we know, that we should!

## **Beliefs About Media....**

**What does Client think is reasonable to spend per year/month on acquiring new customers?..... in dollars? As percentage of present sales? As percentage of sales goals?**

*Notes*

**What does think is reasonable to spend per year/month on keeping, nurturing, and stimulating new business and referrals from present customers?....**

In dollars? As percentage of present sales? As percentage of sales goals?

*Notes*

**Is Client's belief about acquiring new customers that....**

- a) There MUST always be a profit on first transaction = zero acquisition cost
- b) It is acceptable to "go negative" on first transaction + incur some acquisition cost
- c) To meet growth goals, it's necessary to be very aggressive and therefore go go significantly negative on first transaction

**Is Client's belief about media that....**

- a) Some media expenditures that can not be accurately tracked and held accountable for direct or immediate results are necessary for brand building or name recognition?
- b) Most media expenditures are for brand/name recognition
- c) EVERY media expenditure should be ROI accountable

**Client's System for Selling**

**(Identifying Opportunities)**

**If prospects call, are names, addresses, etc. captured every time (regardless of whether appointment set, etc.   \_\_YES   \_\_NO**

**If literature is sent, is a full length sales letter sent with it?   \_\_YES   \_\_NO**

**Is there an organized 'funnel' to first sale?**

**How does Client describe his SYSTEM FOR SELLING**

**Can it be drawn out as a diagram?**

*Notes*



**Is Client using....**

\_\_\_ Upsells

\_\_\_ Cross-Selling

\_\_\_ Downsells

\_\_\_ Multi-Step Followup (Unconverted)

\_\_\_ Packages/Bundles

\_\_\_ Multi-Media Multi-Step Follow-up

\_\_\_ A/B Option options

\_\_\_ System For Getting New Customers Back

\_\_\_ Membership

\_\_\_ Special Referral Promotions

\_\_\_ Continuity

\_\_\_ J.V.'s

\_\_\_ Publicity

\_\_\_ Events

\_\_\_ Other: \_\_\_\_\_

\_\_\_\_\_

**ASSETS INVENTORY (Short List) (Rank Each Item 0-4, 4=Best)**

- \_\_\_ Definite Goals & Objectives, Short-Term, Medium-Term
- \_\_\_ Customer List(s) - Notes \_\_\_\_\_
- \_\_\_ Segmented Customer List \_\_\_\_\_
- \_\_\_ Prospect List(s) /Accumulated Leads \_\_\_\_\_
- \_\_\_ Champions \_\_\_\_\_
- \_\_\_ Well-Defined MARKETS
- \_\_\_ Good Understanding of MARKETS
- \_\_\_ MESSAGE: Organized Presentation of BENEFITS
- \_\_\_ MESSAGE: Effective Presentation of PRICE
- \_\_\_ MESSAGE: Compelling OFFERS
- \_\_\_ MESSAGE: Effective Presentation of PROOF
- \_\_\_ MESSAGE: Guarantees, Risk reversals
- \_\_\_ MEDIA: Use of Numerous Media
- \_\_\_ MEDIA: Appropriate Investment for getting a NEw Customer
- \_\_\_ MEDIA: Appropriate Investment for Keeping a Customer
- \_\_\_ SALES: A true System for following up with prospects

## CLIENT'S KNOWLEDGE BASE & PERSONAL SITUATION

### *Marketing & Business Success Related Books & Publications Read*

- \_\_\_ Think & Grow Rich
- \_\_\_ Jonathan Coates' Youtube/Blog
- \_\_\_ Dan Kennedy Books
- \_\_\_ Other marketing Books – Eg
- \_\_\_ Business Adventures
- \_\_\_ Advertising Secrets of the Written Word
- \_\_\_ Trade Journals, Client's Industry
- \_\_\_ Inc.    \_\_\_Fast Co.    \_\_\_Forbes    \_\_\_Fortune
- \_\_\_ Other: \_\_\_\_\_

### *Other Success Intelligence*

- \_\_\_ Study of most successful in his field? (Files, books, on their lists, etc.)
- \_\_\_ Is there a Coates-style expert in Client's field? \_\_\_With that expert?
- \_\_\_ Staying abreast of what others in his field are doing in other areas of the country

### *Competitive Intelligence*

- \_\_\_ A file on each competitor
- \_\_\_ Mystery-Shopped/shopping competitors

## **ACTION PLAN NOTES**

**What does Client perceive as his most URGENT needs?**

Examples:

Fast Cash Flow Surge

Better Followup on Lead/ Prospects

More New customers

More Effective Advertising

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**What does client perceive as his most IMPORTANT needs?**

Examples:

Steady Flow of New Customers

Better Customers

Increase Profits

More Time to work On Marketing

Diversification

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## **CLIENT SELF-ANALYSIS**

Which of these apply? (0 to 5, 5=Most 0= Not At All)

\_\_\_ Have trouble deciding what to do, to advertise , to market, promote my business.....need good ideas, direction, proven examples to follow

\_\_\_ Have lots of good ideas and know things to do that I'm not doing.....need time, need focus, need someone holding me accountable.... Need better implementation

\_\_\_ Know things I could do to improve my business, but get sidetracked and fatigued by day-to-day grind, lose my motivation

\_\_\_ Feel like i'm a lone wolf in the wilderness too much of the time....get resistance to my ideas, feel like i'm pushing spaghetti uphill with my nose trying to improve things....would be useful to have some support and encouragement...someone to bounce ideas off of

## **CLIENTS THOUGHTS AND COMMENTS ABOUT THE DIAGNOSIS DISCUSSION**

*NOTES*

## Consulting Prescription

For: Client: \_\_\_\_\_

From: \_\_\_\_\_

Coates Enterprises Business Advisor

## NEW CUSTOMER ACQUISITION

Strengths:

Areas of Opportunity:

Highest Priorities:

Second Priorities:

Applicable Process & Services:



**CUSTOMER RETENTION, VALUE DEVELOPMENT,  
& REFERRAL STIMULATION**

Strengths:

Areas of Opportunity:

Highest Priorities:

Second Priorities:

Applicable Process & Services:

## **MARKETING MESSAGE**

Strengths:

Areas of Opportunity:

Highest Priorities:

Second Priorities:

Applicable Process & Services:

## CLIENTS PERSONAL AND PROFESSIONAL DEVELOPMENT

Strengths:

Areas of Opportunity:

Highest Priorities:

Second Priorities:

Applicable Process & Services: