



## IntelOgenesis

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The IntelOgenesis is designed to give IntelOquence the background information needed to assess your current marketing programs. It should take just a few minutes of your time to complete and will enable us to provide you detailed feedback regarding the suitability of your marketing programs to your prospective market, as well as how your efforts compare to that of similarly situated companies.

Any information you provide will be held in the strictest of confidence. If you have questions, please call IntelOquence at 630.262.9282.

### GENERAL INFORMATION

Name \_\_\_\_\_  
Title \_\_\_\_\_  
Company \_\_\_\_\_  
Street address \_\_\_\_\_  
City/state/zip \_\_\_\_\_  
Phone \_\_\_\_\_  
Fax \_\_\_\_\_  
Email \_\_\_\_\_  
Website \_\_\_\_\_

Describe secondary product or service information:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### PRODUCT/SERVICE

Briefly describe your product/service: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### MARKETS SERVED

Please list primary markets/industries to which your company currently sells: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Please list possible secondary markets in which your product/service is not currently well-established:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What is the average dollar value of an individual sale?  
\_\_\_\_\_

What are the primary marketing challenges your company faces? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What might a "key account" customer be worth in total annual sales dollars? \_\_\_\_\_

Approximately what percentage of your total business is derived from the top 20% of your account base? \_\_\_\_\_

Does your product/service have a season? Please describe: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What are the primary advantages/disadvantages of your product/service? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Please identify the job titles of those who influence the decision to buy or specify your product (CEO, Purchasing Agent, Design Engineer, etc.) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Has anything newsworthy been done for your product, your industry, or your company and its principals?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Please describe your primary target audience (age, gender, etc.): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**SALES CHANNEL**

Geographic Sales Coverage

\_\_\_\_\_ Local \_\_\_\_\_ National  
\_\_\_\_\_ Regional \_\_\_\_\_ International

Indicate the composition of your sales force:  
(Number of People)

\_\_\_\_\_ Inside Direct Sales  
\_\_\_\_\_ Outside Direct Sales  
\_\_\_\_\_ Rep Organizations  
\_\_\_\_\_ Distributors/Dealers  
\_\_\_\_\_ Agents (international)  
\_\_\_\_\_ Other \_\_\_\_\_

Describe your sales management hierarchy:  
(Number of People)

\_\_\_\_\_ VP Sales & Marketing  
\_\_\_\_\_ National Sales Manager  
\_\_\_\_\_ Regional Sales Manager  
\_\_\_\_\_ District Sales Manager

Percentage of your business that comes from  
distribution/dealers: \_\_\_\_\_%

**COMPETITIVE ENVIRONMENT**

List yourself and your primary competitors ranked by  
approximate market share:

1. \_\_\_\_\_ 5. \_\_\_\_\_  
2. \_\_\_\_\_ 6. \_\_\_\_\_  
3. \_\_\_\_\_ 7. \_\_\_\_\_  
4. \_\_\_\_\_ 8. \_\_\_\_\_

In terms of price, quality and service, how is your company  
positioned in relation to your competitors?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What tools or selling systems are you aware that your  
competition uses for its own marketing?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**ADVERTISING/LEAD GENERATION**

What are the primary advertising and lead generation  
challenges to be overcome?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

What does your company perceive to be the objective of  
advertising? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

For each of the following activities, please indicate  
approximate annual expenditures:

Paid Space Advertising \$ \_\_\_\_\_  
Press Releases/Feature Articles \$ \_\_\_\_\_  
Direct Mail \$ \_\_\_\_\_  
Trade Shows \$ \_\_\_\_\_  
Directory Listings \$ \_\_\_\_\_  
Internet/Website \$ \_\_\_\_\_  
Other \$ \_\_\_\_\_

Describe the size and type of ads placed:  
Color (4-color, 2-color, or 1-color)

\_\_\_\_\_  
Size (Full page, half page, etc.)  
\_\_\_\_\_

List the primary publications used for advertising and  
public relations (attach media schedule if possible):

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

If you use direct mail, indicate the following:

List Type	# Names	# Times/Year
Customer	_____	_____
Past Inquiry	_____	_____
Rented	_____	_____
Other	_____	_____

Indicate the type of mailings you use:

Catalogue  Newsletter  
 Lead Generation  Promotion  
 Technical Updates  Other

List the trade shows you attend: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

List the directories you use: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**LEAD FOLLOW UP and SALES MANAGEMENT ACTIVITY**  
Indicate the approximate amount of monthly leads:

\_\_\_\_\_

How are your leads processed? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Are your leads entered into a database?  yes  no

If entered into a database, for which of the following activities is the database used?

- Lead tracking
- Territory activity and performance reporting
- Media effectiveness tracking
- List creation for niche mailings

Do you pre-qualify leads prior to sending them to your field representatives?  yes  no

If yes, please describe the process: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**COMPANY BACKGROUND**

Years in business: \_\_\_\_\_

Annual Sales Volume: \_\_\_\_\_

How are sales trending?  
 Up  Down  Flat

Is this a subsidiary/division of another company?  
 yes  no

If yes, name of parent company: \_\_\_\_\_  
\_\_\_\_\_

**OTHER**

Describe any other circumstances affecting your marketing/sales effort that feel are relevant:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Thank you for the time you've taken in completing this Profile. You may find it helpful to include some of the items listed below in order to provide additional background on your company and to complement the information provided:

**CHECKLIST OF ENCLOSURES**

- \_\_\_\_\_ General company literature
- \_\_\_\_\_ Product data sheets/catalogues
- \_\_\_\_\_ Ad samples
- \_\_\_\_\_ Direct mail samples
- \_\_\_\_\_ Media/public relations schedule
- \_\_\_\_\_ Customer Evaluation Report