**Most Important Questions in a Needs Appointment to put together the right recommendations:**

**Establishing the Buckets:**

1. What are the top 3 Products you sell? (You should already know this from research but phrase this in a way that sounds like you have done your work). For instance:

*“From my research I see that in addition to Carpet cleaning you also do Air Duct cleaning and water damager restoration. Would you say those are your top three or possibly your only 3 products or services you sell?”*

1. Of those 3, can you give me the percentage of what you do the most? In other words, I need to know your #1 and #2 of what you do the most. For example, is it:
   1. 75% Carpet Cleaning
   2. 25% Air Duct
   3. 25% Restoration?
2. Now from a profit standpoint would you say that is also accurate or is one of your services or products have a higher profit margin?

**Establishing the Message:**

1. What message for your product do you like your clients to know about you?
2. Is your focus more a sales focus or an education focus?
3. Do you utilize co-op? If so, do you know those guidelines?
4. Do you handle your own creative? It is what we offer at no charge as part of our partnership.

**Establishing the GEO- Where to target!**

1. What typically is your Geo that you target your customers? Or how far will a customer drive (or will you drive) for your services?
2. If there are multiple locations or multiple markets, drill down on the top 3. (What you are trying to do here is establish clusters if possible, to reduce the budget as best you can. You are also able to pull out budget talks if they target, they whole US but they do not have a budget to do that. This will go a long way in asking the budget question).

**Finally, do NOT be afraid to ask, the budget question. Best way to do this is:**

*“Ok I think I have everything I need. What I normally do is go back and strategize with my team and decide on the best solutions to accomplish your goals. What we like to do is show you the “big Picture” and a starting point. Do you have a budget in mind that you would like me to try to work with? Please keep in mind I’m always going to show you what the “MARKET” needs based on your category and search volume and I will always be honest if your budget isn’t enough to make a dent in it, but usually that isn’t the case as we like to start small and grow a business. Once we establish ROI we can continue to add where needed”*