**Discovery Questionnaire Template**

*Last Updated: May 2024*

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***This is a template for a discovery questionnaire that serves as a guide to gather additional detail, such as campaign goals and target audience focus, to inform the development of new marketing campaigns - the italicized text is intended to provide additional context, examples, and direction.***

**GOALS**

* *Impact Goals*
  + *What is the ultimate impact your initiative will achieve? E.g. improve economic outcomes of residents*
* *Business Goals*
  + *What are the “business” goals of your initiative? E.g. generate x# enrollments in a program*
* *Marketing Goals*
  + *What are the specific goals of your marketing campaign? E.g. , generate awareness, create traffic, generate leads, etc.*

**PERFORMANCE METRICS**

* *How will success be evaluated?*
  + *What are the specific, trackable marketing metrics or key performance indicators that you’ll use to measure progress towards your defined goal?*

**TRACKING**

* *How will your marketing campaign be tracked?*
  + *Do you have Google Analytics 4 (GA4) installed?*
  + *Are all goal-based action events tagged for tracking?*
  + *If there are methods of conversion (i.e., call centers), how/where will that information be aggregated?*
* *If tracking is not set-up, it should be completed at least 2 weeks before campaign launch*

**PRODUCT**

* *What product are you promoting?*
* *What are the key features of the product?*
  + *Features are the attributes a product/program has that make it unique/useful (e.g. A “Career Finder” feature on a website that recommends jobs to a user based on their resume)*
* *What are the key benefits to users?*
  + *Benefits refer to how the product helps users improve their lives and helps them answer the question “What’s in it for me?” (e.g. “Career Finder” feature saves users time by matching them to jobs based on their experience)*
* *How do people “buy” your product (sign up or enroll)?*
  + *Is it a direct action or multi-step/high consideration process?*

**CALL TO ACTION/ASK**

* *What should the marketing/advertising ask people to do (visit, learn more, register, etc.)?*

**TARGET AUDIENCE**

* *Who is your audience?*
  + *Who is the expected user of your product/service, or is the current user that you want to attract more of?*
  + *Are you targeting them as a person (a consumer) or as the representative of a business or other entity?*
  + *What are their demographics (age, HHI, employment, education, employment, family, etc.)*
  + *Do you have insight into their psychographics (behaviors, goals, aspirations, barriers, etc.)*
  + *Behaviors (needs, desires, preferences, decision-making drivers)*
* *How familiar is your audience with your product?*
  + *Unaware? Aware but not using (why not?)? Previously used but stopped (why?)?*
* *What is your audience’s state of mind?*
  + *Are they in crisis?*
  + *Do they need temporary/ad hoc help?*
  + *Do they need help to accomplish a specific goal?*
* *What existing research has been conducted around this topic and audience?*

**EXISTING ASSETS**

* *Do you have a website and/or landing page?*
* *Do you have brand guidelines and assets (logo, fonts, color palette, etc.)?*

**PARTNER CHANNELS**

* *Who are your key partners?*
* *What resources do they bring to the table (e.g., email list, social media accounts, etc.)?*

**PAST PERFORMANCE**

* *What marketing initiatives have you tested in the past?*
* *Are there results that can be shared?*

**TIMING**

* *When is the target launch date?*
* *Is there a desired campaign length?*
* *Is there any seasonality to leverage (e.g. the need for tax information that ramps up before April and then drops off)?*

**BUDGET**

* *How much is available for creative production, paid media, outsourcing production?*
* *Does the budget have to be encumbered by a specific deadline?*

**COMPETITIVE CREATIVE**

* *Are there examples of creative (campaigns, websites) that you like?*
* *Are there examples of creative (campaigns, websites) that you do not like?*