



**Pat Millfelt, Serendipitous Connections**  
**[www.serendipitousconnections.biz](http://www.serendipitousconnections.biz)**  
**[pat@serconnect.biz](mailto:pat@serconnect.biz)**  
**715-338-0262**

**Marketing Questions to be completed prior to consultation: Please print, complete and return to Pat Millfelt as attachment in word doc to [pat@serconnect.biz](mailto:pat@serconnect.biz) before consultation. Thank you.**

**Company Name:** \_\_\_\_\_  
**Your Name:** \_\_\_\_\_  
**Phone:** \_\_\_\_\_ **cell:** \_\_\_\_\_  
**Email:** \_\_\_\_\_  
**Website:** \_\_\_\_\_  
**Address:** \_\_\_\_\_

**Description of Services:**

**Current employees/business partners/strategic partners-please identify each and give contact info for those involved:**

**Company History:**

**Company Selling Points (What separates your company from your competition?):**

**Personal and Professional References: names, emails, phone #:**

**Affiliations/groups/clubs/networking opportunities:**

**Business Strengths:**

**Business Opportunities for Improvement:**

**Business Goals:**

**What have you done for Marketing prior to now?**

**What has been most successful?**

**What has not worked?**

**Where would you like to go from here?**

**Marketing Budget?**

**What does your current marketing plan cover? Check all that apply.**

- Internet**
  - Advertising: if so where:**
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- Sales Promotion**
  - Direct Mail**
  - Public Relations/Publicity**
  - Resource Fairs/trade shows**
  - Other (describe)**
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**I would like to see your current brochure, flyers, business cards, and know where you currently advertise, see a sample, etc. I will also need your logo if contracting to be sent in a jpeg via attachment in an email.**

**Is your marketing budget ready, and if so, what direction have you taken for the future?**

**Describe precisely your target market:**

**What time frame are you considering at this time? Standard start up plan is for 3 months.**

**Marketing Strategies with Serendipitous Connections include:  
Consultation, preliminary planning, fact finding, plan presentation, competitive analysis, 3 month strategic visioning plan, implementation, networking, partnership development, social media platform, formal introductions to connections, development of contact data base, mailings, weekly updates and bi-weekly invoicing.**

**\* *Even planning* calendar is extra. Call for details and survey. 715-338-0262**

**\*\**Deposit is required*, plan requires minimum of 3 hrs/wk for the first month, 2 hrs/wk for the second & third months. Contract ends after 3<sup>rd</sup> month, unless review occurs and new goals are discussed. Monthly retainer suggested if contract not extended and wishing for continued marketing srvs.**

