Our first session will cover how you currently do business; the intent of this meeting is to gain an in-depth understanding of your work. We will also discuss the structure of your workday and identify opportunities to leverage social media in your business process.

Following the initial session, Iron Bridge Ltd. will review meeting notes and conduct baseline research into markets, tools and opportunities. Our second session will focus on the results from the Iron Bridge research and discuss a broad framework for your online strategy.

After the second meeting, Iron Bridge will generate a cohesive strategy from the collected research and company data as well as create the appropriate training materials. Breakout sessions will be held as needed to explore areas we feel would benefit from further investigation or detail.

INITIAL BACKGROUND QUESTIONS – please be as detailed as possible.

1. Describe your overall business.
2. Describe your business philosophy.
3. Describe your typical client. (*Do* you have a typical client?)
    a. Who is your target client (*e.g.*, industry, position, company size)?
    b. Describe how you meet your typical client.
    c. What purpose or impact creates the initial point of entry into a prospective client (*e.g.*, proposal of savings, regulatory, adverse event)?
    d. What problems are you typically trying to solve for the client? What pain are you trying to alleviate?
4. Does the decision maker normally have a certain role in a target company? What is the typical process to reach them?
5. What is the typical sales cycle (lead time, scope, *etc*.)?
6. Describe how you currently get leads.
7. Describe your process from lead to sale.
8. Have you done any advertising or marketing to date? What media?
9. What would you consider to be your competitive advantages?
10. Do you have competitors?
    a. How are they currently advertising and/or prospecting?
    b. What is their business model, as far as you can tell?
    c. Do you know how your prospective clients view them?
11. Do you have written materials (brochures, white papers, proposals, articles, presentations, *etc*.)?
    a. To whom are these directed?
    b. Are they currently distributed to anyone?
    c. Where can prospective clients view them?
12. Describe your project management approach.
    a. What are your project resource networks for information and expertise?
    b. What do you do to source additional resources for large projects?
    c. How do you handle bringing new resources up to speed? Do you have a defined process?
13. Describe your technical infrastructure (*e.g.*, office space, computer, technical and telephone systems, data backup, who handles technical issues and support, HR, legal and accounting functions).
    a. Who handles your web site (design and content)?
        - How much time do they have to devote to maintenance and updates?
        - What is the process for updating content on the site?
    b. What reporting do you see from your web site activity?
        - How do you use the information to guide your efforts?
14. How comfortable are you with the following technologies:

a. Email
b. Texting
c. Blogging
d. Online research
e. Any we missed?

15. What are the busiest times of your day? Most slack times? (Is there a pattern?)
16. Are you very structured or flexible in your work day?
    - Are your clients typically very structured?
    - Does this affect how you manage the project?
    - Does this vary widely among clients?