



SAMPLE CONNECT THOSE DOTS BUSINESS DISCOVERY QUESTIONNAIRE

Please complete the following questions as honest, accurate, and complete as this will be used to provide an accurate reflection of your business to be used for your tailored Connect Those Dots Growth Blueprint.

(Fictional business for demonstration purposes)

Your Business Details

Business name:

Connected Dots Luxury Estate Agent

Name of the person the growth blueprint is being created for:

James Thornton

Their job title:

Managing Director

Industry of your business:

Luxury Residential Estate Agency

What products and/or services do you provide?

Luxury residential property sales, luxury property acquisition services, premium property marketing, property valuations, vendor representation, buyer representation, and luxury property advisory services.

How many years have you been trading?

14 years

How many employees does the business currently have?

18

How many locations, offices, branches, or sites do you currently operate from?

2

What geographic areas do you currently serve?

Cheshire and South Manchester

What was your approximate turnover in the last financial year?

£3.4 million

Your Business in Simple Terms

Who would you consider your ideal customer?

Affluent homeowners, high-net-worth individuals, executive families, business owners, senior professionals, and luxury property buyers and sellers.

What do you do?

We help affluent homeowners sell premium residential properties and help luxury buyers find and secure exceptional homes.

Who do you help most?

High-net-worth homeowners and buyers operating within the luxury residential property market.

What problems do you solve for them?

We help sellers maximise property value, reduce stress during the sales process, and achieve successful completions. We help buyers find suitable luxury properties and navigate the purchase process with confidence.

Why do people choose you?



Our reputation, local expertise, communication, personal service, and proven ability to achieve excellent outcomes within the luxury property market.

What makes you different?

We combine luxury market expertise, premium marketing, strong local knowledge, personalised service, and one of the strongest customer review profiles within our market.

How People See You

How do most people first hear about you?

Referrals, recommendations, repeat customers, local reputation, organic search, and social media.

What do they usually check before contacting you?

Google reviews, property listings, recent sales, testimonials, website content, and local reputation.

What questions or doubts do they have before choosing you?

Can you achieve the best sale price? Do you understand the luxury property market? Have you sold similar properties before? Will communication be proactive throughout the process?

Do you feel people trust you quickly or does it take time?

Trust is generally established quickly due to our strong reputation, reviews, referrals, and market expertise.

What Happens Next

What happens after someone contacts you?



We arrange an initial consultation to understand their goals, discuss their property requirements, and agree the most appropriate next steps.

What happens after they become a customer?

We manage the process from instruction through to completion, providing communication, negotiation support, strategic advice, and transaction management throughout.

What do customers value most about working with you?

Communication, professionalism, trustworthiness, local expertise, responsiveness, and achieving strong outcomes.

What do customers sometimes find confusing or unclear?

Property transaction timescales, legal processes, market conditions, and understanding the differences between various marketing approaches.

Your Current Customer Journey

How do people usually find you?

Referrals, repeat business, direct website visits, organic search, social media, and recommendations from professional contacts.

What do they normally do next?

Visit the website, review available properties, read reviews, assess credibility, and decide whether to make contact.

Where do people seem to drop-off or disappear?

During the research phase before making contact and after comparing multiple estate agents.

What usually makes them finally say yes?

Positive reviews, strong trust signals, local expertise, personal recommendations, successful sales history, and confidence in our ability to achieve the best outcome.

Your Website

What is your website meant to do?

Generate property instructions, attract buyers, build trust, demonstrate expertise, showcase properties, and generate enquiries.

Do you feel it is doing that well?

Partially. The website supports credibility and generates enquiries, but it is not generating the level of visibility, authority, or enquiry volume the business could achieve.

What frustrates you about your current website?

Limited non-branded visibility, insufficient content depth, weaker authority signals than leading competitors, and missed opportunities to convert visitors into enquiries.

Where You Want to Go

Where do you want the business to be in 12 months?

Increase property instructions by 25%, increase website-generated enquiries, strengthen brand awareness, reduce reliance on referrals, and improve visibility amongst affluent buyers and sellers.

Where do you want it to be in a few years?

The leading luxury estate agency within our region, operating across additional affluent locations, with a stronger digital presence and greater market share.



Are you thinking about growing beyond your current location?

Yes. We intend to expand into two additional affluent locations.

What do you feel is currently holding you back?

Limited non-branded visibility, reliance on referrals, weaker digital authority than competitors, limited content coverage, and insufficient visibility during the early stages of the customer journey.

The One That Matters Most

If you could fix one thing in your business right now, what would it be?

Increase visibility amongst affluent homeowners and buyers before they enter the market so that more prospective clients discover and trust us before they discover our competitors.