

Situation Analysis

Get a clearer picture of your company

See how you're viewed internally, and more importantly, how you're viewed by the rest of the world.

You already know the answers to many of these questions but there are probably a few, **a critical few**, that you may not readily know how to answer.

That's why this may be of value to you.

Initially, we created this as a process to help **us** get "acquainted" with a new client before we start working with them. But we learned our clients also found it quite helpful for themselves as it helped them re-asses their marketing strategy and current communication programs.

So we figured, why not share it! It could help **you** too.



50 Desert Sands Lane
Yarmouth Port, MA 02675
508.375.9448 tel
508.375.9446 fax

Confidential Client Marketing Profile

1. Company Information

Company Name:

Year Founded: Public / Private (circle one)

Senior Officers:

CEO/President:

VP Sales & Marketing:

Marketing Manager:

Product Managers:

Gross Sales: \$ 2010 (Projected)
 \$ 2009
 \$ 2008
 \$ 2007

Does the company have a written Marketing Plan? Yes No

What are the important objectives and strategies?

Does the company have a long range Business Plan? Yes No

What are the important objectives and strategies defined in the plan?



2. Marketing Information

How well known is the company? (Regionally, Nationally, Internationally)

What is your **perceived image** in the marketplace?

- Among customers:

- Among prospects:

How do you **want** to be perceived in the marketplace?

What is your market share?

What is your mind share?

Will sales objectives be met by:

- Market growth?
- New sales? (Winning orders over the competition)
- Infiltrating the competition's install base? (Companies switching from the competition's product to yours)

Do you have **product** recognition or **company** recognition?

Who are the decision makers?

How are they best reached?

How do you follow-up on leads generated by marketing?



3. Product Information

What are the different product categories?

Do you own any trademarks or proprietary technology?

Average selling price of product?

What is the typical sales cycle for your product?

What new products are planned?

Timeframe for introduction?

4. Competition

Who are your **direct** competitors?

Location:

Size & Growth Trend?

How do you rank competitively?

Sales?

Product breadth?

Product performance?

How does the competition position itself?

What is their market share?

Why do companies buy the **competition's product** rather than yours?

Why do companies buy **your product** rather than the competition's?



5. Your Customers

What is your market universe?

How many individual customers do you have?

What are the primary industries served?

Name a few customers in each industry:

To whom do you wish to sell that you are not selling to?

6. Product Differentiation

What do customers/prospects consider most important when selecting your product?
(In order of importance)

- Product Quality/Reliability
- Company Trust
- Performance
- Price
- Ease-of-use
- Automation
- Growth Potential/Scalability
- Product Breadth (total solution)
- Other

What is your single strongest selling point?

What unique advantages does your product offer?

What specific claims can you make for your product? (Can they be substantiated?)