



Client

- » conduct in-depth interviews with key managers
- » extract quantitative information from client's customers
- » review previous marketing materials & results

Secondary

Sources

- » collect information on competitors
- » review existing studies & industry data

Primary Research

- » determine need for primary research with target market segments and conduct if appropriate

Data

- » review all collected data with emphasis on budget targets & competitive environment

Business Plan

- » review client's business plan and other appropriate company documents

Findings

- » analyze, organize and summarize findings
- » present findings to client for confirmation

Plan Design

- » develop a comprehensive strategy that includes:
 - situation analysis
 - goals
 - target markets
 - positioning statement
 - research highlights

Tactics

- » review available marketing tools and determine most effective for this strategy
- » develop action plan that includes timelines, budgets & appropriate tactics

Assessment

- » conduct formal evaluation of benchmarked key measures to determine effectiveness of action plan
- » revise/refine tactics based on evaluation
- » recommend quarterly reviews with major assessment done annually