

Sample Outline of Planning Sessions

A customized questionnaire was prepared for one of our clients. Two on-site sessions were conducted, as were subsequent telephone interviews with employees and key partners. Support documentation was reviewed, including existing marketing materials, the web site, proposals, legal agreements, presentations and other collaterals. The web sites of 25 competitors and 3 key industry leaders were audited. Four consultants and 15 actual or potential clients were interviewed. The Enterprise Growth Summary addressed strategic, branding, operations and management imperatives including 3 year financial projections as the growth model for this company.



I. Customer Cognitive Hierarchy

- **ACPFB Model**
- **Customer, Buyer & Influencer**
- **Cognitive Process**
- **Tangible Attributes**
- **Attitudes & Behavior**
- **Conversion Points**
- **Behavioral Segmentation**
- **Cognitive - Gestalt Model**

II. Industry

- **Marketing Practices**
- **Competitive Factors**
- **Trends**
- **Segments**
- **Channels**
- **Lifecycle**
- **Barriers to Entry**
- **Conclusions & Opportunities**

III. Competition

- **Key Competitive Factors**
- **Changes in Strategies**
- **Price Points - Sensitivity**
- **Dissonance & Beliefs**
- **Shortages & Vulnerabilities**
- **Strengths**

IV. Company Analysis

- **Product & Services Perception**
- **Relative Advantage**
- **Strengths & Weaknesses**
- **Services Processes / System**

- **Customer & Marketing Orientation**
- **Competitive Factors**
- **Resources**

V. Target Micro-segment Psychometrics

- **Perceptual Map**
- **Cognitive Hierarchy**
- **Marketing Practices**
- **Discriminators**
- **Profile**

VI. Strategy & Tactics Formulation

- **Brand Experience Discriminators**
- **Marketing Mix**
- **Product Perception**
- **Pricing & Profitability Objectives**
- **Collaterals - Dissonance & Emotional Response**
- **Channels Profit Margin**
- **Customer Service**
- **Integration - Sales System**
- **Measurements**
- **Tactics & Strategy**

VIII. Potential New Services / Characteristics

- **Proprietary Methods**
- **Product Perception**
- **Price**
- **Promotion Strengths**
- **Product Gradient**
- **Tangibles & Intangibles**

IX. Pricing & Financial Model

- **Elasticity**
- **Assumptions**
- **Attrition & Accounts Aging**
- **Sensitivity Analysis**
- **Drivers**

X. Managerial & Operational Systems

- **System Model**
- **Sales Goals**
- **Financial / Sensitivity Analysis**
- **Tracking Methodology**
- **Technology Needs**
- **Operational & Financial Support**
- **Conclusions & Deliverables**