

B

Worksheets for the Business Review

The following worksheets correspond to the tasks in Part I. The purpose of the charts is to provide the marketer with a guide on how to assimilate data in order to answer the questions listed in each step of the business review.

At the bottom of each chart is a note on where to find the information necessary to complete the chart.

WORKSHEET 1

Step 1. Corporate and Company History, Mission, and Organization

Corporate and Company History

- Who were the characters? What did they accomplish? What was the timeline of the accomplishments? (Graphically portray the timeline?) What was important to them?
- Was there a villain?
- What's the message of the story?
- What is the plot that brings the message to life?

Corporate and Company Mission

Corporate and Company Goals

Organizational Structure

Where to Find This Information

Internal company sources

Interviews of retired employees

Historical articles

WORKSHEET 2

Step 2. Product: Product Review

Identify products sold in the industry category and within the scope of your business.

Industry Category	Company
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.

Describe your product's history. What developments over the past years make it special today?

Describe the strengths and weaknesses of your company's products and services.

Describe competitive product strengths and weaknesses in relation to your company's products and services.

Identify the product trends that will affect your marketing plan:

Growth of the industry category versus growth of your company:

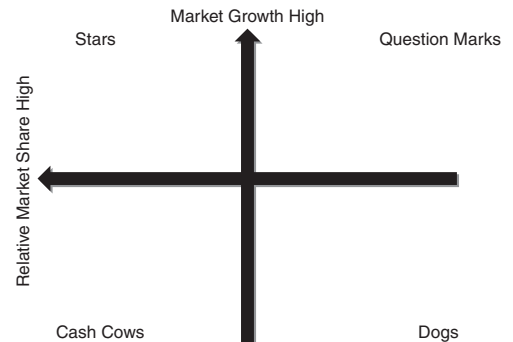
Product innovations: _____

Product design:

Consumer behavior: _____

The figure below is the matrix developed by the Boston Consulting Group. Use the list and the figure to analyze your company's product portfolio:

- List your company's cash cows, and describe their future potential.
- List your company's stars, and describe their future potential.
- List your company's question marks, and describe their future potential.
- List your company's dogs, and describe their future potential.



Discuss where your product is in the product life cycle and how it will affect your marketing decisions.

Where to Find This Information

Internal company data

WORKSHEET 3

Step 3. Sales Analysis: Comparison Table for Your Industry Category's Sales, Your Competitors' Sales, and Your Company's Sales

Total Industry Sales

Year	Total Industry Sales, \$000	Change, %	Total Company Sales	Change, %	Company Market Share, %
2007					
2008					
2009					
2010					
2011					

Total Industry Product Sales

Year	Product A, \$000	Change, %	Percent of Total Industry Sales	Product B, \$000	Etc.
2007					
2008					
2009					
2010					
2011					

Total Company Product Sales

Year	Product A, \$000	Change, %	Percent of Total Product Sales	Product B, \$000	Etc.
2007					
2008					
2009					
2010					
2011					

Estimated Total Competitive Sales

	Sales 2007	Market Share, %	Sales 2008	Market Share, %	Sales 2009	Market Share, %	Sales 2010	Market Share, %	Sales 2011	Market Share, %
Total										
Competitor 1										
Product A										
Product B										
Product C										
Product X										
Total										
Competitor 2										
Product A										
Etc.										

Note: \$000 means thousands of dollars.

Where to Find This Information

Census Bureau, current industry reports

Trade research

Trade publications

NAICS list brokers such as the NAICS Association

Hoover's

Internal company data

Corporation's or company's annual reports, including the Form 10-K reports that it files with the Securities and Exchange Commission (SEC)

WORKSHEET 4

Step 3. Sales Analysis: Seasonality of Industry Sales as Compared to Your Company's Sales by Month

Month	Company Percent of Sales	Company Index to Average ()	Industry Percent of Sales	Company Index to Average ()
January				
February				
March				
April				
May				
June				
July				
August				
September				
October				
November				
December				

Where to Find This Information

Internal company data

Trade publications

WORKSHEET 5

Step 3. Sales Seasonality of Your Company's Individual Products/Brands

Base†	NOVEMBER*		DECEMBER*		ETC.
	Percent of Total Dollars	Index to Total Year	Percent of Total Dollars	Index to Total Year	
Industry category sales					
Company product/brand sales					
Major competitor product/brand sales					

*Example months. Fill in for all individual months.

†Base equals total figures for the year.

Where to Find This Information

Internal company data

Trade publications

WORKSHEET 6

Step 3. Sales Analysis: Store-for-Store Sales

Note: Make sure your year-to-year analysis of per-store averages includes comparable stores that have been open for the full year.

Market	Sales Volume, \$000	Change from Previous Year	Number of Stores	Per-Store Average, \$000	Change from Previous Year	Per-Store Average Indexed to System Average, \$840,000
Market A	\$	%		\$	%	
Market B						
Market C						
Market D						
Market E						

Where to Find This Information

Internal company data

WORKSHEET 7

Step 3. Sales Analysis: Channels of Distribution and Purchases by Outlet Type

Distribution Outlets	PERCENT OF TOTAL SALES				POINTS CHANGE	
	2007		2011		2007 to 2011	
	Units	Dollars	Units	Dollars	Units	Dollars
1.						
2.						
3.						
4.						
Etc.						
Totals						

Where to Find This Information

NAICS list brokers such as the NAICS Association

WORKSHEET 8

Step 3. Sales Analysis: Store Penetration Analysis Method I

	Number of Stores	Sales Last Year, \$000	Number of TV HHs, \$000	Estimated Sales per HH	CURRENT ADVERTISING PLANS		FUTURE ADVERTISING PLANS		
					()%*	Market Media Weight Level	Average Sales per HH	Number of Stores Needed	()%*
Group 1 Markets (Weaker Markets)									
A		\$		\$	\$		\$		\$
B									
C									
D									
E									
F									
Subtotal									
Group 2 Markets (Stronger Markets)									
G									
H									
I									
J									
K									
L									
Subtotal									
Totals and/or Averages for Groups 1 and 2									

* Fill in current percent of advertising spending and future spending based on company records.

Where to Find This Information
 Internal company data
 Standard Rate and Data Service (SRDS)
 Nielsen DMA Test Market Profiles

WORKSHEET 9

Step 3. Sales Analysis: Store Penetration Analysis Method II

	Number of Stores	Existing Stores per 100,000* HHs	Total Sales Last Year, \$000	Advertising Budget: Percent of Sales
A			\$	%
B				
C				
D				
E				
F				
G				
H				
I				
J				
K				
L				
All stores				

*Or whatever you determine to be the optimum.

	Estimated 1-Week Cost	Estimated Number of Weeks	PENETRATION OF 1 STORE PER 100,000 HHs	
			Minimum 1/100,000 HHs	New Estimated Number of Weeks
A	\$			
B				
C				
D				
E				
F				
G				
H				
I				
J				
K				
L				
All stores				

Where to Find This Information

- Internal company data
- Standard Rate and Data Service (SRDS)
- Nielsen DMA Test Market Profiles

WORKSHEET 10

Step 3. Sales Analysis: Market Coverage Chart

	Coverage for Your Product	Percent of Total Product Business in Market, % ACV	Percent of Shelf Space Given Your Product in Store	PERCENT OF SHELF SPACE FOR MAIN COMPETITORS IN PRODUCT CATEGORY	
				Competitor 1	Competitor 2
Outlet A					
Outlet B					
Outlet C					
Outlet D					
Outlet E					
Outlet F					
Outlet G					
Outlet H					
Outlet I					

Note: An identical chart would be created for each key market.

Where to Find This Information

Store checks and/or interviews with store managers
Nielsen's Scan Track

WORKSHEET 11

Step 3. Sales Analysis: Sales Rep Analysis

Sales Rep	Territory	Number of Years a Rep	Total Sales 2010, \$000	Total Sales 2011, \$000	Percent Increase TY/LY Sales	Sales per Account 2010	Sales per Account 2011	Sales per Account Index to System Average 2011
1								
2								
3								
4								
Etc.								

Where to Find This Information

Internal company data

WORKSHEET 12

Step 3. Sales Analysis: Price of Your Company's Product Relative to That of the Competition during Key Selling Periods

	Price First Quarter	Price Second Quarter	Price Third Quarter	Price Fourth Quarter
Your Company				
Competitor A				
Competitor B				
Competitor C				
Competitor D				

Where to Find This Information

Internal company data

Competitors' shops

WORKSHEET 13

Step 3. Sales Analysis: Distribution of Sales by Price Point (Five-Year Trend)

	PRICE RANGE INDUSTRY CATEGORY		PRICE RANGE COMPANY'S PRODUCT	
	Percent of Sales	Percent of Items	Percent of Sales	Percent of Items
2011				
\$ _____-\$ _____				
\$ _____-\$ _____				
\$ _____-\$ _____				
\$ _____-\$ _____				
\$ _____-\$ _____				
\$ _____-\$ _____				
2010				
\$ _____-\$ _____				
\$ _____-\$ _____				
\$ _____-\$ _____				
\$ _____-\$ _____				
\$ _____-\$ _____				
\$ _____-\$ _____				
2009				
\$ _____-\$ _____				
\$ _____-\$ _____				
\$ _____-\$ _____				
\$ _____-\$ _____				
\$ _____-\$ _____				
\$ _____-\$ _____				
2008, etc.				
2007, etc.				

Where to Find This Information

- Internal company data
- Trade publications

WORKSHEET 14

Step 3. Sales Analysis: Category Development Index (CDI)

DMA*	Percent of U.S. Population	Percent of Industry Category Dollar Volume	Category Development Index (CDI) (Volume/Population)	Population Number, 000	Dollar Volume of Industry Category Nationally, 000	Per Capita Consumption
Market 1						
Market 2						
Market 3						
Market 4						

*DMA is the Designated Market Area defined by television viewing audience.

Where to Find This Information

Industry trade publications

WORKSHEET 15

Step 3. Sales Analysis: Brand Development Index (BDI)

DMA*	Percent of Company's Population	Percent of Company's Dollar Volume	Brand Development Index (Volume/Population)	Population Number, 000	Dollar Volume of Company Nationally, 000	Per Capita Consumption
Market 1						
Market 2						
Market 3						
Market 4						

*DMA is the Designated Market Area defined by television viewing audience.

Where to Find This Information

Internal company data

WORKSHEET 16

Step 3. Sales Analysis: Store/Office Trading Areas

<u>Zip Codes Surrounding Store</u>	<u>Percent of Customers Over 1-Week Period</u>
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Where to Find This Information

Company store surveys

Company mailing lists

WORKSHEET 17

Step 4. Trend Analysis: PESTLE

Trend Category	Questions to Be Addressed	Findings	Impact Potential	Impact Rating	Impact Trend	Strategy Impact
		What are the ramifications of the findings?	How could the factors listed in the Questions column impact your company or your products and services?	Would you rate the impact potential in the previous column: H: High M: Medium L: Low U: Unknown	Would you say the trend identified in the Findings column was: I: Increasing S: Steady D: Decreasing U: Unknown	What are the potential strategy impacts of this finding? How will this trend affect your company into the future? What can be done to either mitigate or accentuate the trend?
Political	<p>Are there any political trends or issues that have surfaced that will affect your company either positively or negatively?</p> <p>Are there any pieces of legislation that if passed will either positively or negatively affect your company?</p> <p>Are there any existing government policies that will either positively or negatively affect your company or its products and services?</p> <p>Are there positive or negative public attitudes that may manifest themselves at the political polls in the future?</p> <p>Other?</p>					
Economic	<p>List the economic factors that are critical to your business (e.g., home sales, disposable income rates, saving rates, or rate of inflation). For each factor, are there positive or negative trends that will affect the factor in the near future? What are they?</p> <p>Are there tax trends that will affect your business?</p>					

Trend Category	Questions to Be Addressed	Findings	Impact Potential	Impact Rating	Impact Trend	Strategy Impact
Social	<p>Are there historical market trends that will affect your business?</p> <p>Are there specific industry and economic factors that will affect your business?</p> <p>Do there exist company financial factors such as cash flow, capital requirements, cost containment initiatives, or salary requirements for new talent?</p> <p>Other?</p>					
	<p>Are there demographic trends such as income, education, place of residence, sex, and age that will affect your business into the future?</p> <p>If you're a business-to-business firm, is there a shift in terms of the types of businesses buying or the influence of various job titles in the purchase of your products? Or is there a different buying behavior that is causing shifts in your business?</p> <p>Are there geographic trends that are affecting your business? These might be demographic trends that are stronger in one part of your trading area, the country, or the world than another. Are shifts in population to some areas of the country and not others going to affect your business?</p> <p>What are the social trends affecting the purchase of your products (home, activities, purchase trends, time pressures, standards</p>					

Trend Category	Questions to Be Addressed	Findings	Impact Potential	Impact Rating	Impact Trend	Strategy Impact
	<p>of living, occupations, earning potentials, etc.)?</p> <p>What are the shifts in attitudes that might affect your business (toward aging, health, diversity, education, fashion, consumerism, youth culture, pop culture, retired people, sports and recreation, etc.)?</p> <p>Are there changes in the ways businesses purchase from other businesses that will affect the way you do business into the future?</p> <p>Are there changes in the way people and businesses obtain information or news and communicate with each other?</p> <p>Has the organization structure changed, or will there be trends going forward that will impact your business?</p> <p>Are there management trends that will impact your business?</p>					
Technological	<p>Has the ability to capture transaction and customer data affected your business environment?</p> <p>Will a new technology alter the way your industry category or your company conducts its business?</p> <p>Will there continue to be Internet and social media innovations that will impact your business?</p>					
Legal	<p>Are there any legal trends that will affect your business</p>					

Trend Category	Questions to Be Addressed	Findings	Impact Potential	Impact Rating	Impact Trend	Strategy Impact
Environmental	(trademarks, copyrights, patents, organizational structures, etc.)? Are there staff attitudinal changes that will affect your business? Are there trends that will affect the organizational culture? Are customer values, opinions, lifestyles, and mores changing in ways that will affect your business?					

Where to Find This Information

Census Bureau, current population projections

Popcorn Report, Faith Popcorn

Yankelovich Monitor Report

American Demographics, www.adage.com: *American Demographics Magazine* ceased publication in 2004, but it remains a leader in trends analysis through its special sections published in the *Advertising Age Magazine* and its online insights.

Nielsen ConneXions

Forrester Research

Iconoculture's marketing research interactive IconoIQ database

WORKSHEET 18

Step 5. Consumer and Customer Review: Consumer Target Market, Demographic Profile by Volume

Demographic Descriptor	INDUSTRY CATEGORY			COMPANY		
	Total Number of Customers	Percent of Total Customers	Percent of Total Purchases	Total Number of Customers	Percent of Total Customers	Percent of Total Purchases
Age						
Under 18						
18–24						
25–34						
35–44						
45–54						
55+						
Sex						
Male						
Female						
Household Income						
\$15,000 and under						
\$15,001–\$35,000						
\$35,001–\$50,000						
\$50,001–\$75,000						
\$75,001–\$100,000						
\$100,001–\$125,000						
\$125,001–\$150,000						
\$150,001+						
Education						
Did not graduate from high school						
Graduated from high school						
Some college						
Graduated from college						
Graduated from graduate school						

Demographic Descriptor	INDUSTRY CATEGORY			COMPANY		
	Total Number of Customers	Percent of Total Customers	Percent of Total Purchases	Total Number of Customers	Percent of Total Customers	Percent of Total Purchases
Occupation						
White collar						
Blue collar						
Farmer						
Employment						
Full time						
Part time						
Unemployed						
Family Size						
1						
2						
3-4						
5-6						
7+						
Geography						
Urban						
Suburban						
Rural						
Home						
Own home						
Rent						

Where to Find This Information

Experian Simmons

GfK Mediamark Research & Intelligence (GfK MRI)

Census Bureau, county business patterns

Industry trade publications and industry research studies, supplied through trade associations

WORKSHEET 19

Step 5. Consumer and Customer Review: Consumer Target Market, Demographic Profile by Concentration

Demographic Descriptor	Percent of Industry Total Category That Purchases Product Nationally	Concentration Index*	Percent of Company Customers
Age			
Under 18			
18–24			
25–34			
35–44			
45–54			
55+			
Sex			
Male			
Female			
Household Income			
\$15,000 and under			
\$15,001–\$35,000			
\$35,001–\$50,000			
\$50,001–\$75,000			
\$75,001–\$100,000			
\$100,001–\$125,000			
\$125,001–\$150,000			
\$150,001+			
Education			
Did not graduate from high school			
Graduated from high school			
Some college			
Graduated from college			
Graduated from graduate school			

Demographic Descriptor	Percent of Industry Total Category That Purchases Product Nationally	Concentration Index*	Percent of Company Customers
Occupation			
White collar			
Blue collar			
Farmer			
Employment			
Full time			
Part time			
Unemployed			
Family Size			
1			
2			
3-4			
5-6			
7+			
Geography			
Urban			
Suburban			
Rural			
Home			
Own home			
Rent			

*Percent of industry category that purchases plus the percent of the total population that purchases (for example, 30 percent of the 18- to 24-year-olds purchase, and 10 percent of all people purchase, which results in an index of $10 \div 30$, or 33).

Where to Find This Information

Experian Simmons

GfK Mediamark Research & Intelligence (GfK MRI)

Census Bureau, county business patterns

Industry trade publications and industry research studies, supplied through trade associations

Internal company data

WORKSHEET 20

Step 5. Consumer and Customer Review: Consumer Target Market, Demographic Description of Company Purchasers Compared to Industry Category Purchasers

Demographic Descriptor	Percent of Purchasers of Industry Category Nationally ()*	Percent of Purchasers of Company Product ()* %	Index: Company/% Industry
Age			
Under 18			
18–24			
25–34			
35–44			
45–54			
55+			
Sex			
Male			
Female			
Household Income			
\$15,000 and under			
\$15,001–\$35,000			
\$35,001–\$50,000			
\$50,001–\$75,000			
\$75,001–\$100,000			
\$100,001–\$125,000			
\$125,001–\$150,000			
\$150,001+			
Education			
Did not graduate from high school			
Graduated from high school			
Some college			
Graduated from college			
Graduated from graduate school			

Demographic Descriptor	Percent of Purchasers of Industry Category Nationally ()*	Percent of Purchasers of Company Product ()* %	Index: Company/% Industry
Occupation			
White collar			
Blue collar			
Farmer			
Employment			
Full time			
Part time			
Unemployed			
Family Size			
1			
2			
3-4			
5-6			
7+			
Geography			
Urban			
Suburban			
Rural			
Home			
Own home			
Rent			

*Provide total dollar volume in parentheses.

Where to Find This Information

Experian Simmons
GfK Mediamark Research & Intelligence (GfK MRI)
Internal company data
Primary research

WORKSHEET 21

Step 5. Consumer and Customer Review: Consumer Target Market, Heavy-Users Demographic Descriptors Compared to All-Users Demographic Descriptors

	Heavy-Users Demographic Profile	Heavy-Users' Percent of Purchases	All-Users Demographic Profile	All Users' Percent of Purchases	Index of Percent of Heavy Users/Percent of All Users
Age					
Sex					
Household income					
Education					
Employment					
Family size					
Geography					
Homeownership					
Psychographic and lifestyle description of the heavy user compared to the average user					
Attribute preference					
Geographic location					

Where to Find This Information

Experian Simmons
 GfK Mediamark Research & Intelligence (GfK MRI)
 Internal company data
 Primary research

WORKSHEET 22

Step 5. Consumer and Customer Review: Revenue Distribution of Customers by NAICS Code

NAICS Code	Category	Total Establishments in Total Trading Areas	Enterprise (Headquarters for Multiple-Location Firms)	Total Customers (Enterprise)	Penetration	Total Sales (\$000)	Average Dollars per Customer	Index to Average
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Where to Find This Information

Department of Commerce, county business patterns
 Census Bureau
 Dun's Marketing Service, a Dun & Bradstreet Company
 NAICS

WORKSHEET 23

Step 5. Consumer and Customer Review: Business-to-Business Target Market, Product Category Purchases by Outlet Type

Outlet Type	Product Category: Where Consumers Purchase	Percent of Total Outlets	Percent of Company's Business
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Where to Find This Information

Industry trade publications and industry research studies, supplied through trade associations

WORKSHEET 24

Step 5. Consumer and Customer Review: Product Awareness

- Unaided first mention awareness relative to competition by target market segment

	Percent 2007	Percent 2011	Percent Increase/Decrease
Segment 1			
Segment 2			
Segment 3			

- Unaided awareness relative to competition by target market segment

	Percent 2007	Percent 2011	Percent Increase/Decrease
Segment 1			
Segment 2			
Segment 3			

- Aided awareness relative to competition by target market segment

	Percent 2007	Percent 2011	Percent Increase/Decrease
Segment 1			
Segment 2			
Segment 3			

- Knowledge and understanding of the key company products and services

	Percent 2007	Percent 2011	Percent Increase/Decrease
Segment 1			
Segment 2			
Segment 3			

Where to Find This Information

Primary research: telephone surveys, web surveys, intercepts

WORKSHEET 25

Step 5. Consumer and Customer Review: Product Attributes

- Attribute or Attitude importance by target market segments:

Segment	Top Attributes or Attitudes by Importance
1.	1. 2. 3.
2.	1. 2. 3.
3.	1. 2. 3.

- Competitive ranking of attributes or attitudes by target market segments (your company's rank for each attribute relative to the competitors):

Segment	COMPANY RANKING ON TOP ATTRIBUTES	
	Attribute or Attitude	Company Ranking
1.	1. 2. 3.	
2.	1. 2. 3.	
3.	1. 2. 3.	

Where to Find This Information

Primary research: telephone surveys, web surveys, intercepts

WORKSHEET 26

Step 5. Consumer and Customer Review: Trial and Retrial Behavior

	Percent Ever Used	Percent Used Last 6 Months to 1 Year	Loyalty Measure: Percent Used Last 6 Months to 1 Year/Percent Ever Used	Consumer Awareness, %	Percent Aware That Have Used Past 6 Months to 1 Year
Company					
1. Segment					
Product					
Product					
Product					
2. Segment					
Product					
Product					
Product					
Competition					
1. Segment					
Product					
Product					
Product					
2. Segment					
Product					
Product					
Product					

Where to Find This Information

Market surveys

WORKSHEET 27

Step 5. Consumer and Customer Review: Purchase Frequency Rates and Buying Habits

- Average number of yearly purchases per *consumer* in industry _____
- Average number of yearly purchases per *company customer* _____
- Average industry dollars per *consumer* purchase _____
- Average company dollars per *customer* purchase _____
- Average industry number of items purchased per each consumer purchase _____
- Average company number of items purchased per each customer purchase _____
- Company market share: _____
 - Market share, dollars _____
 - Target market penetration, percent of target market universe that are customers _____

Note: The above chart should be completed for the aggregate consumers and customers in your industry category and your company and for each significant segment. A similar chart should be developed for the heavy-user segment contrasting heavy users to all users.

Where to Find This Information

Internal company data

Primary research

NAICS list brokers such as the NAICS Association

Corporation's or company's annual reports, including the Form 10-K reports that it files with the Securities and Exchange Commission (SEC)

Hoover's

WORKSHEET 28

Step 5. Consumer and Customer Review: Purchase Frequency Rates and Buying Habits for Retail

This chart provides examples of how to monitor heavy-user purchase behavior through primary research. A "heavy purchasers" and "all purchasers" category is provided for each question.

Visits to all stores in competitive set or industry category per month and per year

Heavy purchaser (or key segment) _____

All purchasers _____

Visits to your store per month and per year

Heavy purchaser (or key segment) _____

All purchasers _____

Total purchases (dollars and units) at all stores in competitive set or industry category per month and per year

Heavy purchaser (or key segment) _____

All purchasers _____

Total purchases (dollars and units) at your store per month and per year

Heavy purchaser (or key segment) _____

All purchasers _____

Category purchase ratio for percent of visits to purchases in competitive set or industry category

Heavy purchaser (or key segment) _____

All purchasers _____

Your store purchase ratio for percent of visits to purchases

Heavy purchaser (or key segment) _____

All purchasers _____

Note: The above chart should be completed for the aggregate consumers and customers and for each significant segment.

Where to Find This Information

In-store surveys

WORKSHEET 29

Step 5. Consumer and Customer Review: Brand Loyalty

Brand	All	Sole	Loyalty Index	Sole and Primary	Loyalty Index	All Users
		%	%	%		%

Where to Find This Information

Experian Simmons

GfK Mediamark Research & Intelligence (GfK MRI)

Primary research

WORKSHEET 30

Step 6. Competitive Review: Annual Competitive Spending Analysis and Share of Voice

Institution	Total Expenditure, Dollars	Share of Spending: Total Expenditures	Change from Last Year
Your company			
Competitor			
Competitor			
Competitor			
Competitor			

Institution	MEDIA							Total, \$
	Television, \$	Newspaper, \$	Magazine, \$	Radio, \$	Outdoor, \$	Internet, \$	Social Media, \$	
Your company								
Competitor								
Competitor								
Competitor								
Competitor								

Where to Find This Information

- Media reps
- Competitrack
- TNS Media Intelligence

WORKSHEET 31

Competitive Review: SWOT Analysis

	STRENGTHS			
	Your Company	Competitor 1	Competitor 2	Competitor 3
Company Background				
Corporate and company history				
Corporate and company mission				
Corporate and company goals				
Organizational structure				
Product Review				
Product assessment				
Product portfolio				
Product life cycle				
Sales Analysis				
Market category				
Competitors				
Company				
Channels of distribution				
Sales representative or broker network				
Price				
Geography				
Trend Analysis (PESTLE)				
Political				
Economic				
Social (consumer)				
Technological				
Legal				
Environmental				
Consumer and Customer Review				
Target market segments				
Awareness				
Knowledge				
Attitudes				
Behavior				
Company Departments				
Media spending				
Customer service				
Marketing				
Sales function				
Technology				
Other				
Overall Brand Positioning				

Note: Set up and complete the same table for each of the other three components of SWOT: weaknesses, opportunities, and threats.

WORKSHEET 32

Problems and Opportunities

Company Background

Corporate and Company History

Problems

Opportunities

Corporate and Company Mission

Problems

Opportunities

Corporate and Company Goals

Problems

Opportunities

Organizational Structure

Problems

Opportunities

Product Review

Product Assessment

Problems

Opportunities

Product Portfolio

Problems

Opportunities

Product Life Cycle

Problems

Opportunities

Sales Analysis

Market Category

Problems

Opportunities

Competitors

Problems

Opportunities

Company

Problems

Opportunities

Channels of Distribution

Problems

Opportunities

Sales Representative or Broker Network

Problems Opportunities

Price

Problems Opportunities

Geography

Problems Opportunities

Trend Analysis (PESTLE)**Political**

Problems Opportunities

Economic

Problems Opportunities

Social (Consumer)

Problems Opportunities

Technological

Problems Opportunities

Legal

Problems Opportunities

Environmental

Problems Opportunities

Consumer and Customer Review**Target Market Segments**

Problems Opportunities

Awareness

Problems Opportunities

Knowledge

Problems Opportunities

Attitudes

Problems

Opportunities

Behavior

Problems

Opportunities

Competitive Review**Company Background**

Problems

Opportunities

Product Review

Problems

Opportunities

Sales Analysis

Problems

Opportunities

Trend Analysis (PESTLE)

Problems

Opportunities

Consumer and Customer Review

Problems

Opportunities

Company Departments

Problems

Opportunities

Overall Brand Positioning

Problems

Opportunities