

SECTION 1

Review of Company History

- Corporate structure
- Major events that have shaped the company
- Anticipated changes that may affect customer profile

Marketing/Positioning Mind Set

- Tools used
- What has worked
- Company commitment to marketing

Products/Services

- Industry ranking for quality, service, and price
- Best and worst selling products/services (volume/profitability)
- Unique differentiating features/services

Customers

- Demographics
- Existing customer experience and surveys
- Defining internal perception of those you serve

Competition

- Leading competitor review (competitive advantages/disadvantages)
- Defining your perception of who your competition is and why

Sales

- Value of customer transactions
- Review of customer qualification process
- Review of current CRM system and usage
- Review of sales funnel tracking system
- Review of compensation program
- Review of quoting process
- Review of overall sales process

Advertising/Marketing

- Review of existing marketing materials
- Review of existing advertising budget
- Review of mission statement
- Review of existing brand matrix
- Consistency of corporate marketing image/use on all platforms
- Review of trace/track/monitor

Challenges

- Consumer misconceptions
- Existing and potential untapped opportunities

Goals/Objectives

- Existing SWOT Analysis review
- Existing revenue/profitability goals and review
- What is today and what you desire for the future

SECTION 2

Competition

- Leading competitor review (competitive advantages/disadvantages)
- Defining internal perception of who your competition is and why

Client Survey Review

- Blind response of 5 (five) client interviews
- Defining client perception of your company and your competition

Staff Survey Review

- Blind response of up to 5 (five) key staff members
- Defining staff perception of company (challenges/opportunities)

SECTION 3

Recommendations

- General overview of all findings
- If applicable, culture change requirements
- Greatest assets
- Essence of marketing and sales strategy
- Future focus for goals and objectives
- Specific recommended initiatives
 - Sales process development and training
 - Advertising and marketing plan
 - Corporate/team development
- Initiative(s) spread sheet

	Time	Investment
Your Team	6 hours	\$2500
Nalani Team	20 hours	