



# Marketing

## Fact Book Worksheets

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Mary Browning

Brand & Marketing Consultant

[mary@manyhatsmktg.com](mailto:mary@manyhatsmktg.com)

[www.manyhatsmktg.com](http://www.manyhatsmktg.com)



# What is a Fact Book?

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Collection of information that sets up/supports the marketing plan. Generally assembled prior to development of plan.

Moving supportive/informational elements into a fact book helps deliver a pithy, to-the-point operationally-focused marketing plan.

All data and information can be used to create material or presentations

Composed of 4 elements

- **Market economics**
  - ▶ Target Market, size, growth, margins, pricing sensitivity, brand, market life cycle, barriers to entry
- **Competition -**
  - ▶ Who, share, revenue, products, strategy, vulnerabilities, activities, goals
- **Business -**
  - ▶ Goals and objectives, products (current and future), service quality, pricing strategy, distribution, performance, brands, SWOT
- **Customers**
  - ▶ Target audience, demographic and psychographics profile, perceptions and reality



# Planning Methodology

Phase 1

Phase 2

Phase 3

Phase 4



Fact Book	Strategic Plan	Promotional/ Creative Approach	Execution & Implementation	Measurement & Analysis
<b>Prep/Collect</b>	<b>Define</b>	<b>Mix Description</b>	<b>Production</b>	<b>Audit</b>
Data Gathering	Situation Analysis	Brand image	Identify production resources	Quarterly communicate value of marketing investment
Objectives	Corporate Info	Creative direction		
SWOT	Product Info	Define product scope		
Define Target Audience	Channel/ Distribution	Identify approaches		
Identify revenue and market share goals	Competitive Analysis	Go to Market		
Analyze competition	Pricing	Project Plans		
Review existing materials	Customer Analysis	Corp ID System		
Identify customer touch points	Problems and Opportunities	Advertising		
Understand product roadmaps	Strategic Planning	Promotion		
	Marketing Objectives	Collateral Tree		
	Marketing Strategies	Sales Tools		
	Targeting and Segmentation	Though Leadership		
	Identification of competitive advantage	PR/Press kits/ releases		
	Positioning and branding	Analyst Program		
	Promotional Mix	Key Influencer		
	Budget	E-Marketing		
	Timing	Demo's		
	Evaluation	Product		
		Newsletters		
		Events/ Tradeshows		
		Website		
		Lead Generation		



# Market Economics Background

<b>Segment Description: Size Growth Rate, etc</b>	
<b>Current and Emerging Trends</b>	
<b>Estimated Profit Potential of Trends</b>	
<b>Trend needs not being met. Jobs to be done.</b>	
<b>What is the economic climate?</b>	
<b>Is your business affected by cycles or seasons?</b>	



# Competitive Worksheet

Top 5 Competitors	EST \$\$ Sales	Brands	Points of Differentiation	Perceived Quality	Pricing	Value Proposition	Core Brand Feature	Estimated Mktg. Budget
Your Brand								
Competitor #1								
Competitor #2								
Competitor #3								
Competitor #4								
Competitor #5								



# Points of Differentiation Worksheet

#1 reason people buy						
Meaningful Points of Differentiation						
Parity Features						
Brands						
			Your Brand			
			Competitor #1			
			Competitor #2			
			Competitor #3			
			Competitor #4			
			Competitor #5			



# Brand Positioning Worksheet

Brands in Category	Key Customer Benefits	Brand Positioning Statement
Your Brand		
Competitor #1		
Competitor #2		
Competitor #3		
Competitor #4		
Competitor #5		



# Competitive Product Assessment

Attributes	Weights (Must total 100%)	Your Product	Competitor #1	Competitor #2	Competitor #3	Competitor #4
Feature						
Feature						
Feature						
Feature						
Feature						





# Competitive Audit

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For each competitor collect:

- Corporate logo
- Corporate positioning statement
- Corporate tag-line
- Product names and logo marks
- Product positioning statements
- Corporate and product brochures
- Selected web pages
- Selected advertising
- Selected direct mail pieces

Including key positioning statements and value proposition language to assess common phrases and ideas, as well as key phrases that may be unique to a given competitor.



# Brand strategy & promise

Internal: The core benefits you offer customer

Category	Questions	Answers
<b>Vision</b>	Why do we exist? What is our purpose?	
<b>Value</b>	What are our fundamental beliefs & principles	
<b>Concept</b>	What business are we in?	
<b>Differentiation</b>	What makes us unique?	
<b>Benefit</b>	What are our core strengths and advantages	
<b>Motivation</b>	What compels customers to buy and use our products?	
<b>Expression</b>	What distinguishes the way we sell or provide service?	



# Brand Credentials Worksheet

<b>Historical and current facts that provide a brands image added dimension. (ex. yrs. in business)</b>	
<b>Market Leadership</b>	
<b>Awards, Certifications, Accreditations</b>	
<b>Trends or needs not being met. Jobs to be done.</b>	
<b>Articles, Testimonials</b>	
<b>Achievements</b>	
<b>Product Ratings</b>	
<b>Prestige of customers lists</b>	
<b>Prestige of Strategic Alliances</b>	
<b>Management/ Leadership Credibility</b>	



# Business

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## Business Objectives

- Objective #1 Revenue related
- Objective #2 Product related
- Objective #3 Market/Brand Related

## Background Supporting Points

- Customer Sat #'s (service, quality, referral)
- Primary Research Facts
- Secondary Research Facts



# Sales

<b>What are your distribution channels?</b>	
<b>How does your target audience typically purchase your product or service?</b>	
<b>How long is a typical sales cycle?</b>	
<b>What criteria does your target customer use to make a purchase decision?</b>	
<b>What criteria does the target audience use when selecting a supplier?</b>	
<b>How important is price in the customers decision?</b>	
<b>What is the perceived value of your products compared to it's price</b>	
<b>What services do you include in the price of your product</b>	
<b>What industry or competitive trends drive prices up or down?</b>	
<b>Are your target customers the end user of the product, have final purchase authority or recommend solutions.</b>	
<b>What are their sources of information on new products?</b>	



# Pricing Strategy

Quality

		Low	Medium	High
Price	High	"Best Buy" Strategy	"We Try Harder" Strategy	"Rolls Royce" Strategy
	Medium	"Smart Shopper" Strategy	"Piece of the Rock" Strategy	"Out Performs" Strategy
	Low	"Bargain Hunter" Strategy	"Keeps on Ticking" Strategy	"Feature Packed" Strategy



# SWOT

		Positive	Negative
<b>Internal Factors</b>	Strengths	<ul style="list-style-type: none"> <li>Technological Skills</li> <li>Leading Brands</li> <li>Distribution Channels</li> <li>Customer Loyalty/Relationships</li> <li>Production Quality</li> <li>Scale</li> <li>Management</li> </ul>	<ul style="list-style-type: none"> <li>Absence of important skills</li> <li>Weak brands</li> <li>Poor access to distribution</li> <li>Low customer retention</li> <li>Unrealized product/service</li> <li>Sub-scale</li> <li>Management</li> </ul>
	Opportunities	<ul style="list-style-type: none"> <li>Changing customer tastes</li> <li>Geographic markets</li> <li>Technological advances</li> <li>Changes in government politics</li> <li>Lower personal taxes</li> <li>Change in population age-structure</li> <li>New distribution channels</li> </ul>	<ul style="list-style-type: none"> <li>Changing customer tastes</li> <li>Closing of geographic markets</li> <li>Technological advances</li> <li>Changes in government politics</li> <li>Tax Increases</li> <li>Change in population age-structure</li> <li>New distribution channels</li> </ul>
<b>External Factors</b>	Threats		



# Product Roadmap

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There are several kinds of roadmaps that can be developed - they can be used to focus sales, to reassure customers of your future direction or for briefing press and analysts. It also can be used as an internal guide for priorities or resource allocations.

- **Market & Strategy**
  - ▶ Used to describe the markets you will be going after and how you plan to develop products for each segment.
- **Visionary**
  - ▶ Used to describe trends in the industry
- **Technology**
  - ▶ Used to describe technology trends and mapping your products/releases to them
- **Product**
  - ▶ Internal - Used to drive development priorities and communicate to management
  - ▶ External - Used in communications with customers, partners, press and analysts - based on internal maps but much more vague.





# Solution Matching

What we have to sell		What customers are trying to do	
1		1	
2		2	
3		3	
4		4	
5		5	
6		6	



# Target Audience

Media Preferences			
Why or how they purchase			
% of Market			
Psychographics (behavior)			
Demographics (age/gender)			
	Primary	Secondary	Tertiary



# Customer Overview

**What is the customer's primary reason for buying your product or service?**

**Why would they choose your product over the competition?**

**What is the size of our customer base?**

**Who is the decision-maker?  
Who are the ratifiers?**

**What is the sales process?**