

**Purpose +
Positioning**
CARDS

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COMPANY



HISTORY

Where/when was the company founded?

Who are the founders of the company and why did they create it?

Is there anything unique or intriguing about the beginnings of the company?

Key milestones?

Significant issues?

Stats: Years in business? Locations? Employees?

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COMPANY



REACH & CHANNELS

What is your attitude toward advertising? Aptitude for risk?

What has worked best for you in the past?

What have you tried that didn't work?

What channels do you prefer?

Are there channels you are skeptical of?

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COMPANY



FOUNDATION

What is the company's current mission, vision, values?

When and how were they created?

How are they communicated to the employees?

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COMPANY



FOUNDATION

What key strategies drive the company?

What is your marketing/advertising strategy?

What is your sales strategy?

Where does / will the company provide services? Local, Regional, National, Global?

What is your vision for company reach/size?

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COMPANY



GOALS & SUCCESS

What are the companies key objectives/goals?

How frequently are goals/objectives established and reviewed?

How do you define success?

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COMPANY



CULTURE

Describe your company culture? How do you measure your culture?

What do your employees love about your company?

What do your employees NOT love about your company?

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COMPANY

V.

PRODUCT / SERVICES

What are your primary products and services?

How often does the company change or evolve the products and services?

What drives those changes?

What products and services have been the most successful?

What products and services have you tried and failed?

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COMPANY

V.

UNIQUENESS, IP & R&D

Do you own any IP, Patents?

What is your point of uniqueness? What do you do better than anyone else?

What is your R&D process or approach?

Are there new products or services in the pipeline?

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COMPANY

V.

SALES, REV & BUDGETING

How does the company make money?

How do you measure / track sales?

What is the sales funnel / cycle?

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MINDSET

What are the primary demographics of this industry?

Who are the psychographics of this industry?

What keeps customers up at night? What are their fears?

What gets them out of bed in the morning? What are their hopes and dreams.

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CUSTOMER NEEDS

What/who are your current target markets? Why?

What problem are you solving for them? (Job to be done)

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CUSTOMER BEHAVIOR

How do customers behave in this industry? (ex: they shop around for a long time before making a decision, they tend to be hyper critical, they are influenced by trend setters, etc).

Explain brand loyalty in this space.

What sources do customers turn to for knowledge / data / info as it relates to your product or service? (ex: our customers are influenced by their mom and info they find on google or our customers are influenced by what they read in the news) etc.

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BRAND SENTIMENT

Who is buying your products and why?

Why do your customers like you/not like you? How do you know?

What customer data do you have?

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BIASES & ASSUMPTIONS

What are customers' biases and assumptions as related to the industry, products and services?

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CATEGORY



COMPETITION

Who is your primary competitor?

What do they do better than you?

What do you do better than them?

What is their reputation in the industry?

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CATEGORY



CATEGORY REPUTATION

What is the reputation of the industry as a whole?

Are their misconceptions about the industry?

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CATEGORY



CATEGORY HISTORY

What is the history of the industry?

Who are the leaders in the industry as a whole? Local leaders?

Who are the original players?

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CATEGORY



MARKET SHARE

What is your market share? Where do you rank competitively?

How has this changed over time?

Who owns the most market share? How volatile is it in your industry?

What is the biggest barrier to achieving market share goals?

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CATEGORY



CATEGORY PLAYBOOK

What is the industry playbook?

What is status quo in the category?

Describe “The way it’s always been done”

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CATEGORY



INNOVATIONS & TRENDS

What are the latest innovations in the industry?

What trends are prominent in the industry?

How do you feel about these innovations & trends?

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INFLUENCES

What cultural influences have the most impact on the industry? (social, political, weather, economy, health/diets, etc)

Who are the influencers in this category? (Celebrity, Social, etc.)

What is the industries impact on the culture? (ex: advertising industry can shape pop culture)

What is the cultures impact on the industry? (ex: in a down economy this industry thrives)

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SEASONALITY / EVENTS

How seasonal is the industry?

What are the most relevant holidays?

What major events are impactful / important to the industry? (Olympics, Oscars, Superbowl, etc.)

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TRENDS

What trends are most interesting right now?

What trends are most concerning right now?

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TENSIONS & PROBLEMS

Are there any tensions or issues in culture that are negatively impacting the category or your business?

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