

Research Checklist

A –Corporate

Copies of corporate documentation analysed and interpreted for opportunities	Attached
• Last published accounts	
• Corporate brochure	
• Specific brochures	
• Copy of website	
• Press releases	

Mission Statement

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What is our opportunity in relation to this statement?

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What rumours (or known facts) are there which could indicate an opportunity?

- Mergers / acquisitions:
- Strategic initiatives:
- Business / personnel changes:
- Products launches:
- Latest news:

A -Corporate continued

Market Forces Affecting the Company	
Forces	Impact
Competition	
Technological	
Organisational	
Customer	
Political	
Economic	

B –Competition Within The Account

Competitors	Strengths	Weaknesses
1.		
2.		
3.		

C –People

Organisation Charts	Attached
Head Office	
Regional Office(s)	

Personal Profiles –Key Players				
Name	Job Title	Buying Role (1)	Hot Buttons (2)	Contacts
1.				
2.				
3.				
4.				
5.				
6.				

(1) Buying Role	(2) Hot Buttons
Ch –Champion Co –Coach D –Decision maker I –Influencer B –Buyer U –User	e.g. Quality, technical performance, accreditation, local support, ease of use, price etc.