

Play to win!



Research drives strategy

Otherwise, you're guessing.



You can't argue with data – right?

Companies that use data to drive marketing have stronger ROI's, better results and – most important – better long-term outcomes than companies that essentially guess at their marketing and branding. And that's nothing more than drawing strategy straws and hoping you pick the right one. When marketing teams leverage research to define the direction of a brand, marketing plan or a campaign – they win! A great research program can literally give you the answers and direction you need to develop strategy, or at least get you going in the right direction.

With so many easy-to-use tools on the market, like SurveyMonkey, Google, SpyFu, GrowthBar and Qualtrics, companies can collect their own data.

But where to start? What is the right form of research to answer your specific questions? What do you do with the data? We hope that this outlined guide helps your team make better decisions as you go down the research journey.

	Competitor 1	Competitor 2	Competitor 3
Company Name			
Core Category of Product/Service(s)			
Brand look/feel			
Value proposition			
Tagline Or key messages			
Industries Served			
Customer types			
How they talk about their customers			
Customer acquisition			
Marketing channels			
Advertising channels			
Sales channels (If applicable)			
Revenue (About – if not employees)			
Strengths			
Weaknesses			
Similarities			
Differences			

How It Works

On a scale of 1 to 5, rate your team's performance. 1 = Weak (we need to improve) 5 = Strong (we've got this handled!) Be brutally honest—it's the best way to see where your marketing shines and where you can grow.

	1	2	3	4	5
It is clear who in the company is accountable for marketing performance.					
Our marketing budget is spent wisely and effectively.					
Our marketing goals and plan align with our business goals.					
Marketing is considered an essential success pillar in the business.					
It is clear how what determines marketing decisions.					
It is clear how we measure our marketing.					
Communication and reporting are regular.					
Our sales campaigns are driving new leads and sales.					
Our sales and marketing people work together every day.					
We adapt to market changes and trends.					
We are creative and innovative with our marketing.					
We understand what the customer wants and needs.					
We make strategic, smart and calculate marketing decisions.					
Our marketing service providers get the results we need.					
We present message and graphics consistent across all medias and platforms.					
We understand our competitive advantages.					
We make strategic, smart and calculate marketing decisions.					
Our marketing service providers get the results we need.					
We do market research to understand opportunities.					
The sales and marketing teams have clear goals.					
We have a clear brand strategy.					
We know our positioning in the marketplace.					
COLUMN TOTAL					
X the corresponding weight					
TOTAL	X1	X2	X3	X4	X5

Your Score
(Add up all 5 totals)

[Click here](#) to see how you rank.

Here is how to get your results.

Step One: Count how many answers you have in each column.

Step Two: Multiply the column total by its corresponding weight. (Column 1 = Total x1, Column 3 = Total x 2)

Step Three: Add up all five numbers = Your answer is your percentage score.

Step Four: See how you ranked below:

Start with objectives

1. Define what the problem or opportunity might be.

- What are we really trying to accomplish?
- What assumptions do we need eliminate?
- What do we need to verify?
- What are the opportunities?

2. Outline the sections of the information that is needed. For example, if you're launching a new software product, you're going to want to identify where people would learn about it or buy it. What problems are you solving? What other brands do the users access now? How would they benefit from your product? How much is the user willing to spend?

Determining the type of research

Emailed surveys are not the answer to everything. There are over 50 methods of capturing information, data and opinions. Determining which one is right for your objectives is very important. To help get you started, below is a short list of survey types and what questions they can help answer. If no one on your team is experienced at market research, consulting with a firm with market research capabilities can at least help you to determine the best method and plan of attack on your survey.

Method	What it answers
Customer Satisfaction Survey	A customer's satisfaction with a brand.
Brand Loyalty	What motivates a customer to buy.
Brand Equity Survey	How consumers view the brand.
Employee Happiness	How to attract and retain employees.
Competitive Analysis	Defines what makes you different from your competitors or finds market gaps.
Secret Shoppers	Provides direction for areas of improvement or how your competitors deliver products and services.
Brand Audit	Identify opportunities to improve specific or general areas of marketing and the customer experience.
Focus Group, Street Surveys	Develop an understanding of a customer's satisfaction with a brand, transaction, product, etc.
Situational Observations	Observe customer behaviors and reactions.
Buyer's Journey Mapping	Determine what motivates people to buy and what decision-making processes they use.
Customer Touchpoint Mapping	Inventory of the customer experience.
Competitive Analysis	Define competitive differences, position, and promotion.

Design & prepare your survey

There are hundreds of variables and scenarios to designing survey questions. The design you choose depends on your objectives and research type. Whichever direction your research has taken, it is critical to beta-test your questions and review the results prior to launching into the full research. This will give you an opportunity to test your questions and methods so you can make final adjustments.

While you're testing your research method and questions, it is also a good idea to check your distribution channels and lists to make sure you can reach the RIGHT audience needed. For instance, if you're conducting some kind of electronic survey, this might mean purchasing targeted lists, making sure your customer contact lists are up to date, ensuring you're connected with your audience on social media, etc....

Collecting, analyzing & presenting data

Presenting data is an art much more than a science. It is very easy for a presenter to add their opinions and emotions to a data presentation. An audience will pick up on this quickly and the data will lose all credibility. So, please stick with the facts.