

## Account Planning Checklist

This document is intended to help the account and creative teams gather, obtain, and maintain the information needed to proactively contribute to a client's business. The particular methodology utilized will be determined based on the optimal outcome, in the given timeline, for the available budget.

Methodologies may include:

- Qualitative: One-on-one interviews, triads, focus groups, man-on-the street intercepts, observational (fly-on-the-wall), ethnographic studies, online chat rooms, online surveys, etc...
- Quantitative: Online surveys, telephone surveys, mail surveys

It is important that information is up-to-date and accurate; data that is greater than 12 months old is considered obsolete from a marketing perspective. Anytime a new opportunity presents itself, it is recommended that the team ensures that accurate data is present to support strategic development.

### Have/Need Information Required

- Target market intelligence
- Competitive intelligence
- Market intelligence/Industry information
- Trend information
- Business Plan
- White papers
- Analyst information
- Interviews/surveys with key marketing constituents
- Customer Satisfaction info
- Media Plan
- Communications/Web Audit
- Brand experience
- Sales experience
- Message development
- Concept testing
- Ad testing
- Copy testing
- Brand equity evaluation
- Post testing
- Market feedback (i.e. press, buzz, etc...)
- Customer feedback (i.e. sales, etc...)
- Management feedback (opinions about past, current, future...)