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| **1-Overview** | **Answer/Comments** |
| Describe the program being considered. |  |
| What are the organization’s business objectives related the product or service associated with this program? |  |
| What are the key performance indicators (KPIs) or specific measures of success from a business perspective?  (e.g. number of new customers, increase in average purchase size, increase share of wallet, reduction in customer attrition, etc.)? |  |
| What are the current benchmark metrics as they relate to measures of success mentioned above? |  |
| Describe any internal/external risks or impediments that exist within the project timeframe.  (e.g. key personnel or technical environment changes, key decisions pending, regulatory changes) |  |
| List the key stakeholders and their roles/responsibilities in the organization and on this project.  (e.g. being informed of status, reviewing status, commenting on status & deliverables, approving deliverables) |  |

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| **2-The Target** | Answer/Comments |
| Who are your key target audiences in order of importance, described demographically and/or in terms of behavioral distinction? |  |
| Do you have preferred research sources for internal reporting or agency integration purposes? (e.g. Nielsen v ComScore...) |  |
| Describe your target further, demographically &psychographically if needed |  |
| Describe key motivators or impediments for using your product or service? |  |
| Describe known opportunities or motivations (e.g. cyclical purchase imperatives, health needs) or impediments (e.g. age restriction, inadequate financing) that are internal or external to these targets |  |
| What do you want them to think/feel as a result of interacting with you brand? |  |

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| **3-The Product/Service** | Answer/Comments |
| What is the product or service and any relevant history/background? |  |
| What are the product‘s **internal differentiating characteristics** or points of distinction?  Positive (scalable)?  Negative (approval process)? |  |
| What are the product‘s **external differentiating characteristics** or points of distinction?  Positive (customer service)?  Negative (high price)? |  |
| How do you overcome or leverage these distinctions to consumers? |  |
| List, in priority order, the sources of traffic to your web site, stores, call centers,customer reps, etcas well as any unrealized potential. |  |
| Describe any major, non-competitive obstacles.(see section 5 for competitive) |  |

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| **4-Branding & Creative Assets** | Answer/Comments |
| Describe your brand essence and note any discrete offline or online-specific aspects. |  |
| Describe any common misconceptions or areas where the brand perception has not been fully realized. |  |
| Describe the level of internal consensus over key brand & style characteristics? |  |
| Are there published brand and style guidelines for use online including logo usage, color palettes, editorial tone and style guides? |  |
| What assets are available to the agency? Highlight & Comment about those, which are most relevant to this initiative. |  |

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| **5-The Market / Competition** | Answer/Comments |
| Summarize the findings of any recent / relevant primary research (usability or focus group testing, surveys, etc.) that has been conducted? |  |
| Describe any key information you feel is missing from our understanding of your product or service as it relates to the objectives stated in this document. |  |
| Summarize any key secondary research or insights that you have encountered that will shed light on the issues your company faces. |  |
| List your major competitors and their points of distinction (e.g. product/ service superiority, marketing superiority) in order of importance? |  |
| Describe any major market changes, their anticipated impact and your organization’s plans. |  |

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| **6-Marketing & Advertising Efforts** | Answer/Comments |
| Describe any relevant past and current marketing and advertising initiatives (objectives, response, channels used, efficacy)? |  |
| Describe the relationship of the creative to other materials in the market place including other channels, web sites, PR, social networking, etc. |  |
| How are these initiatives measured? |  |
| Describe future programs planned. |  |

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| **7-Technical Parameters** | Answer/Comments |
| Describe your technical environment including dev, staging and production. |  |
| Describe your key technology supplier arrangements e.g. current hosting arrangement, etc |  |
| Describe your security parameters. |  |
| Do you expect to engage in any data capture or analysis? If so, describe (e.g. database employed)? |  |
| List key hardware and software planned or already deployed. |  |
| Describe relationships with any third parties. Who are the contacts at that organization and their roles? |  |

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| **8-Operations** | **Answer/Comments** |
| Describe your preferred format and other considerations for presentations and reviews. |  |
| What are the roles and hierarchy of reviewer and approvers? |  |
| Describe the involvement department within your organization (e.g. brand, legal, etc.) and their role and requirements in reviews (check-in during preliminary rounds, comprehensive reviews using printouts of all materials in final rounds, durations needed for review) |  |
| Describe the procedures for arranging for conference rooms at your facility. |  |
| Describe, as a whole, your company's preferred working hours and preferences for meetings that do not occur during non-business hours. |  |
| Are there any key team members who will not be available during the projected duration of this project? |  |
| What is the standard configuration of computers for your team including connection speed, browsers, email and calendar programs, etc. |  |

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| **9-Paid Media & Search Investments** | **Answer/Comments** |
| Please provide historical reports – both Excel-based and any wrap-up presentations or documents that have been drafted over the past year. |  |
| Do the sample reports include all KPIs that you would like to track? If not, which other KPIs are relevant for the business? |  |
| What are the key insights and learnings that have been generated over the past year? How have these informed current strategy? |  |
| What datasets related to Paid Media and Search are available? Please provide examples. |  |
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| **10-Other (as appropriate** | **Answer/Comments** |
| Social Media platforms (Listening, Authoring, Analyzing) |  |
| List all active Social Media Accounts, owners and authors of content |  |
| Describe Issue / Crisis Management processes, protocols and risk management approaches |  |
| Affiliate Programs |  |
| Sales promotion events/cycles |  |
| Event Marketing |  |
| Public Relations |  |
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