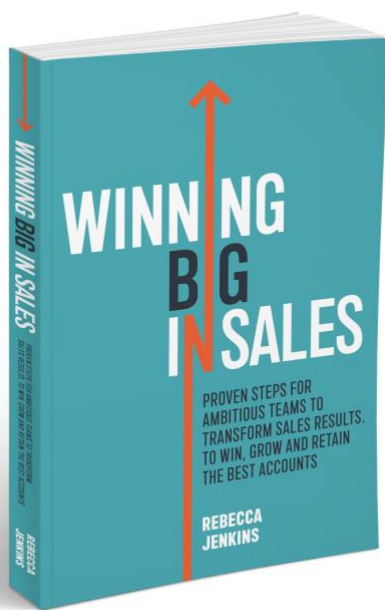




COMPANY & SECTOR INSIGHTS TEMPLATE

GAINING INSIGHTS

Gaining company and sector insights is central to the methodology of winning big in sales. A template to gain those insights is included in this document

Rebecca Jenkins

Template – Company and Sector Insights
Company Name
Contact name and job title
Website
Address
Parent company
Financial Status, current and last 3 years Turnover, profitability, credit rating, public/private Who are the directors? (make a note of their name to connect/follow on social media)
Is the company of a size and scale that is viable from a business opportunity perspective? (Does it fit with the sweet spot from your first analysis of your existing clients and financial analysis?)
Vision, mission, statements Review company accounts/website/articles/press releases for information that gives you a good understanding of their goals, culture and values/new product developments/clients/service offering/challenges/problems that they are talking about/awards won.
Contact name and details, job title, LinkedIn profile of decision makers/influencers/directors.
Are they talking about any specific challenges or trends that you didn't capture in the sector analysis.
Who is the current provider of the services/product you provide and what do they

offer that you don't?

Length and value of their existing contract (if applicable).

Their position in market, top tier, mid-tier, emerging.

What are their key business and economic drivers, i.e. efficiency, growth, disrupting a market, market share, occupancy levels, machine downtime?

Note: Reading trade/professional journals & reports relevant to the sector will provide this information, as well as attending relevant seminars, workshop and conferences.

What are the current trends?

What challenges is the sector facing?

What future opportunities are being discussed at events or professional associations about the future?

Is the market being disrupted by newcomers or new technology and how are companies reacting to that?

If companies could have three wishes fulfilled to resolve challenges and improve the market what would they ask for?

What political, legal, geographical, environmental challenges is the sector facing?



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