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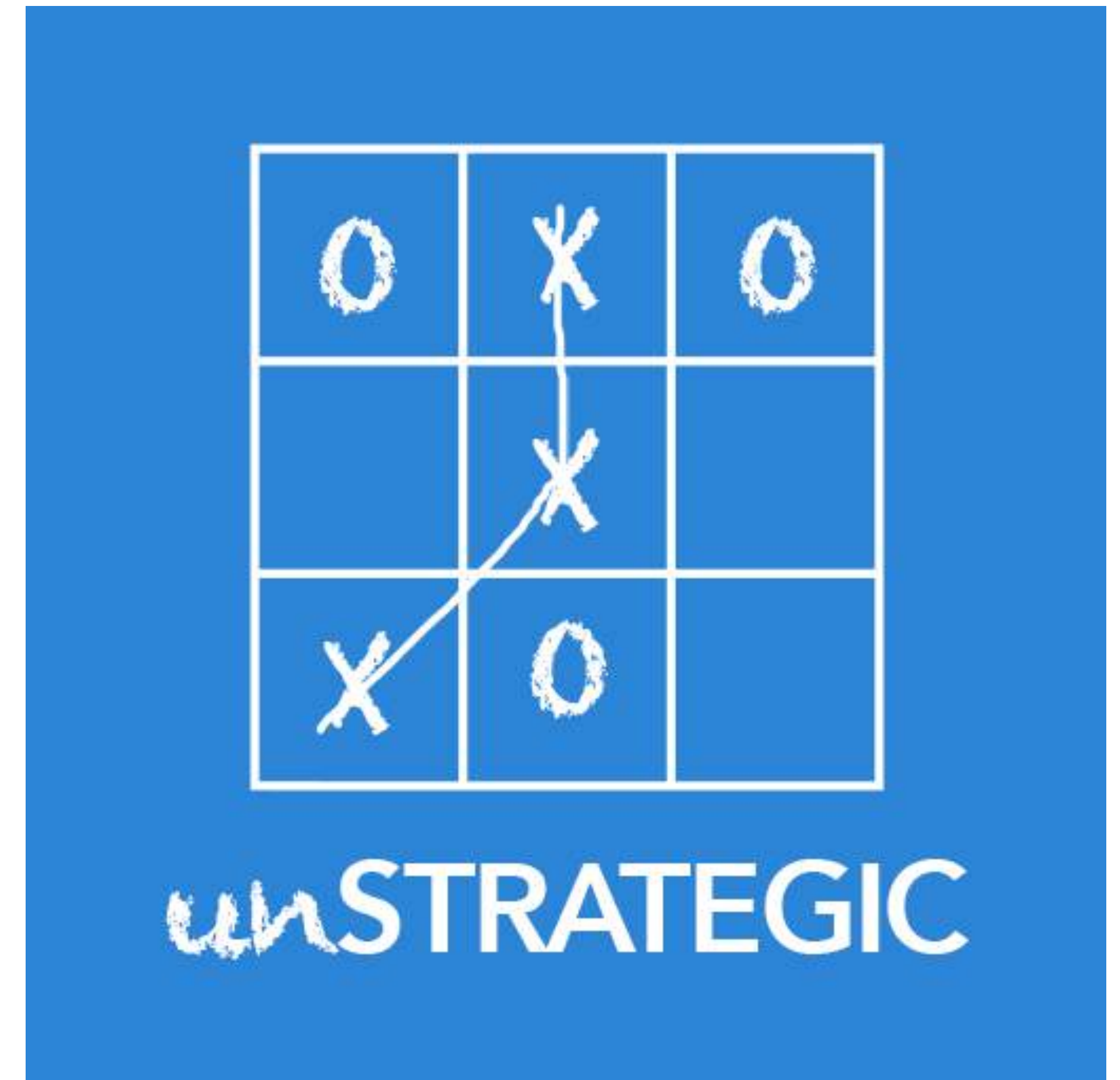
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SECTION

1

CLIENTS

Landscape

UNDERSTANDING YOUR CLIENT

1 CLIENT LANDSCAPE

You can probably find a lot of this information online, but documenting your client's current landscape is important. It'll give you a bird's eye view of their business and general information that'll prepare you to dive deeper.

2 CLIENT / AGENCY DYNAMIC

You may need to work with your internal team to get more information on the account history and client/agency relationship. But this is where we'll start to think about the account strategically and come up with goals to achieve a better partnership.

3 CLIENT / ENGAGEMENT INTAKE

An intake sheet is a critical first step to documenting the strategy of an engagement. This works when you have a new client and want to form a strong relationship with them. It will get the client landscape and project goals down on paper.

**4 CLIENT ASSESSMENTS**

You'll want to look at the current state of your client's business, web and mobile properties, social channels, and analytics to get a solid understanding of who you're working with and how best to help them.

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CLIENT LANDSCAPE

COMPANY NAME:	
MAIN POINT OF CONTACT:	
COMPANY OVERVIEW:	
TYPE OF COMPANY:	
TYPE OF PRODUCT/SERVICE:	
INDUSTRY:	
ANNUAL REVENUE:	
FOUNDED / HEADQUARTERS:	
NUMBER OF EMPLOYEES:	
WEB/DIGITAL PROPERTIES TECHNOLOGY USED	

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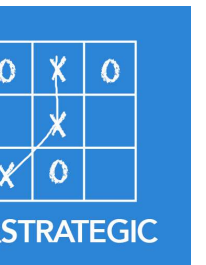
CLIENT / AGENCY DYNAMIC

HISTORY OF THE ACCOUNT	
CLIENT BUSINESS GOAL: (short & long-term)	
SERVICES WE CURRENTLY PROVIDE:	
SERVICES WE COULD PROVIDE:	
VISION FOR THE ACCOUNT:	
3 GOALS TOWARD THE VISION	
THINK S.M.A.R.T.	**SPECIFIC, MEASURABLE, ATTAINABLE, RELEVANT, TIMELY**
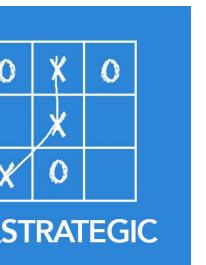
Client Intake Sheet

The client intake sheet is similar to the client landscape and has a few overlapping areas. You use the intake sheet when you have a new client; it's designed to get some general info upon starting the engagement. Here's an example intake sheet:

1. **Company Overview**

   Name: Generica Corp
   Classification: Large Organization
   No. of Employees: 10,000
   No. of Countries: 35
   Service/Product: Digital Products
   Structure: Board of Directors, Leadership, Management, Rank

2. **Major Business Goal**

   Continue to grow the business around the world and become a top 5 global player in the digital products market.

3. **Regional Hubs**

   North America, United Kingdom, Singapore, United Arab Emirates

4. **Major Markets**

   North America, United Kingdom, Japan, China, Russia

5. **Account/Project Objectives**

   To build an internal company mobile app that helps employees improve their lives by encouraging healthy behavior at work.

6. **Name of Company Competitors**

   Swanson Corp. Chip & Co., Horner & Twitch

7. **Name of Project Competitors**

   *It's important to note that competition can depend on what the client/project objective is. If you are working with a digital product company that builds tools for development teams, but they are looking to build a health mobile app for their employees, the competitors should be other health apps, not digital product companies.

8. **Research, Data & Analytics**

   Any information your client has on their marketplace, their competitors, their users, and so on is a crucial step in the foundation for your research, putting together personas, and understanding your client's industry.

Client Assessment

There are a few different exercises you can perform to understand and assess your client and their business a little more. Listed below are a few of the exercises you can do.

1 SWOT Analysis

What are your client's strengths, weaknesses, opportunities, and threats.

2 Social Listening & Review

Understanding how your client's social followers are engaging with them on the many different social channels will give you more insights and help you determine areas for improvement.

3 Analytics Review

Analyzing the data that your client has, usually in the form of Google Analytics or something similar, this will give you an understanding into how your client's users are currently interacting with them online and their behavior with digital properties.

4 PEST Analysis

Looking at the political, economic, social, and technological factors that affect your client can help with better insight into the current landscape

5 Brand Assessment

Brand assessment incorporates a few different key areas to look at: Brand reputation, Users/Customers, Competitors, Innovators, and Industry Disruptors

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SECTION

2

ASSESSMENTS

Understanding Your Client

SWOT

Strengths describe the positive attributes, tangible and intangible, or your organization. These are within your control.

Opportunities are external attractive factors that represent reasons for your business to exist and prosper

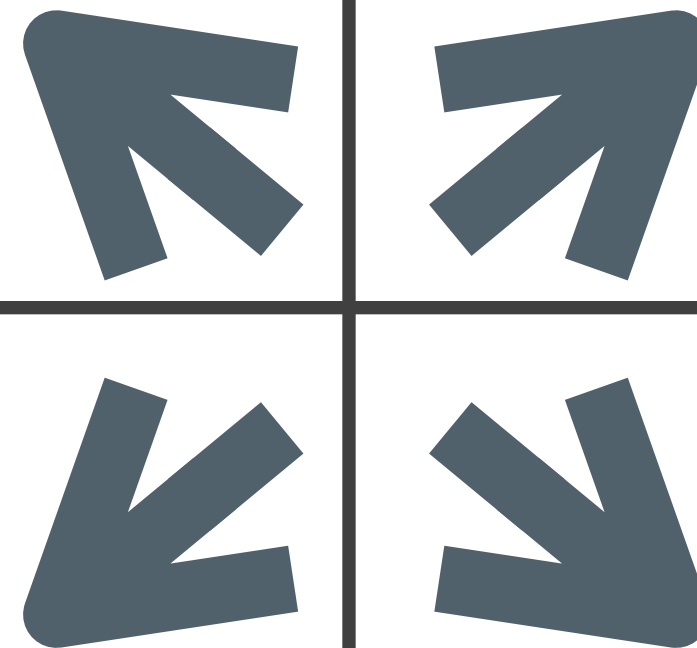**INTERNAL**

EXTERNAL

STRENGTHS

OPPORTUNITIES

WEAKNESSES

THREATS

Weaknesses are aspects of your business that detract from the value you offer or place you at a competitive disadvantage.

Threats are external factors beyond your control that could put your business at risk. You may benefit from having contingency plans for them.

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Social Listening

There are a lot of great tools to measure social engagement. Analyze your client's social channels across these different areas: Amplification, Applause, and Conversation. You can also focus on relative rate* to compare followers to followers on different networks, determine the engagement rate per follower per channel.

COMPETITORS
Keeping an eye on competitors and what they're doing well is always good practice.

FOLLOWER COUNT
Seeing an up-tick in your followers is always great, but it needs to be measured with other parameters.

CONVERSATION
An increase in comments.

AMPLIFICATION
An increase in shares, re-tweets, or re-posts.

APPLAUSE
An increase in likes and/or favorites.

RELATIVE RATE
This lets you accurately compare between several channels that have a different number of followers.

*RELATIVE RATE'S IMPORTANCE
Having 50 Likes per post with 500 followers is a great achievement, but having 50 likes per post with 5 million followers is not a great achievement. And you can accurately gauge your competitors that have a different number of followers.

FOLLOWERS

COMPETITORS

CONVERSATION

AMPLIFICATION

APPLAUSE

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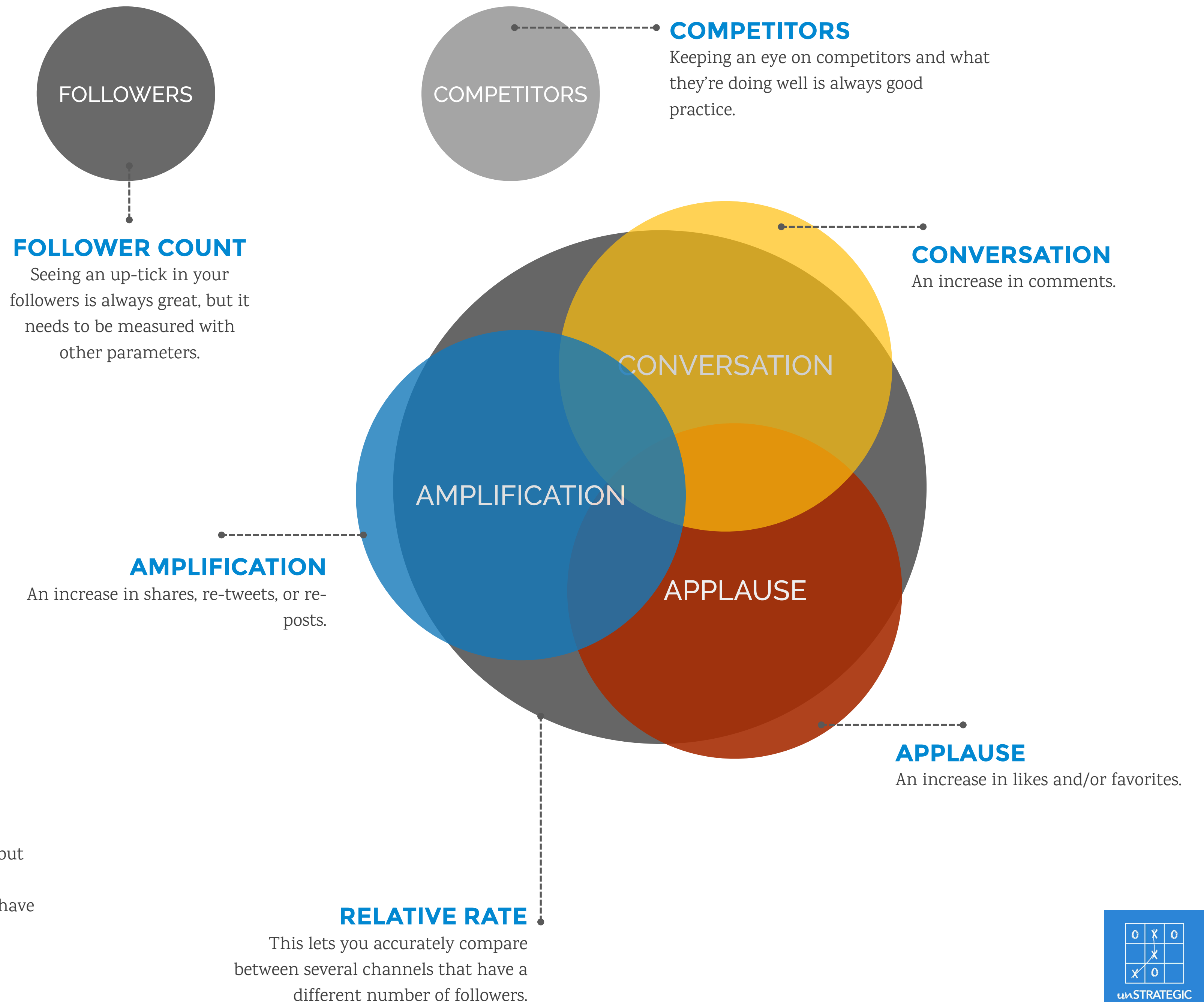
Analytics

Visitors

Understand who your client's visitors are and what they like.

What are their demographics, psychographic, affinity, and in-market segment data?

Acquisition

Look at how your client's website is acquiring the traffic it gets.

Is it organic, referrals, social channels, paid search?

Engagement

Look at how engaged your client's visitors are and what they are doing once they get to the site

Bounce rate, average time on site, pages viewed per visit

Goals / Conversions

First, determine what is the ultimate goal of the website. Do you want visitors to download a PDF? Or fill out a form. Then track those conversions.

Behavior

This essentially gives you a funnel and outlines each step in a buying process. Look at user flows which can help you identify certain paths to conversion.

*Note: This is a very basic overview of analytics.

Beginner's Guide to GA: https://moz.com/blog/absolute-beginners-guide-to-google-analytics

Advanced Tips and Tricks: https://moz.com/blog/advanced-google-analytics-tips-and-tricks

PEST

Political

Government type and stability
Freedom of Press
Rule of law; corruption, crime
Upcoming elections that could shift the power tide
Pending legislation or taxation changes
Other political factors that are likely to change

Economic

Stability of current economy; growing, stagnating, or declining
Key exchange rate stability
Disposable incoming - is it rising or falling
Unemployment rate; skilled workforce easy to build or expensive
Do consumers and businesses have easy access to credit
How is globalization affecting the economic environment

Social

Population growth rate and age profile
Generational shifts in attitude
Society's level of health, education, and social mobility
Social stratification factors
Social attitudes and taboos that could affect the business
Religious beliefs and lifestyle choices

Technological

New technologies to be used / leveraged
New technologies on the horizon that could radically affect work/industry
Competitors have access to new technology that could redefine their products
Remote work and its affect on infrastructure work patterns
Existing technological hubs that could learn from or work with

P E S T

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BRAND ASSESSMENT

(1) PURPOSE & REP

Point out the good
Point out areas to be improved
What's the current reputation?

(2) USERS / AUDIENCE

Demographics
What do they think and feel?
Empathy map / Touchpoints

(3) COMPETITORS

Who are they?
What are the advantages and
disadvantages?
Positioning

(4) INFLUENCERS

Who in the market is a top
influencer? What can we
learn from them?

(5) INDUSTRY DISRUPTORS

Who or what is disrupting the
industry right now?
Can we leverage it or will it hurt us?

(6) WEBSITE MUST-HAVES

What feature / functionality
on the website makes the
brand standout?

BRAND

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ACCOUNT STATUS

Projects, Revenue, Relationships
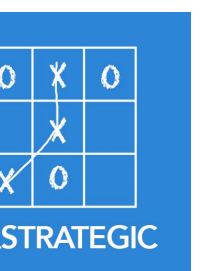
SECTION

3

PAST/CURRENT PROJECTS

	START	END	SUMMARY	BUDGET	COMMENTS
PROJECT 1 CURRENT					
PROJECT 2 PAST					
PROJECT 3 PAST					
PROJECT 4 PAST					

REVENUE / ANNUAL SPEND

EXPENDITURE	$ Q1	$ Q2	$ Q3	$ Q4
CAPITAL EXPENDITURE	$85,000	$25,000	$32,000	$108,000
OPERATIONAL EXPENDITURE	$3,000	$3,000	$3,000	$3,000

SOLUTION	VENDOR	AMOUNT	COMMENTS
MARKETING SITE REDESIGN	AGENCY	$120,000	DID REDESIGN IN QUARTER 1 OF THIS YEAR, BUT HAD TO CUT INTO Q2 BUDGET SPEND FOR LAUNCHING SITE. SPEND PER QUARTER IS $100k.

RELATIONSHIP MAP

VENDORS

ORGANIZATION

Name:
Position:
Influence:

Linkedin Profile:
Comments:

Name:
Position:
Influence:

Linkedin Profile:
Comments:

Name:
Position:
Influence:

Linkedin Profile:
Comments:

Name:
Position:
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RESOURCES / RELATIONSHIP BUILDER

	WHITEPAPERS	ARTICLES	EMERGING TECH	THOUGHT LEADERSHIP
EXECUTIVES				
DIRECTORS				
MANAGERS				
PERSONNEL				

ACCOUNT PROPULSION

Risks, Ideas, Opportunities, Innovation

RISKS

RISK / BARRIER	LEVEL	IDEAS TO OVERCOME IT?	TEAM MEMBER	RESOURCES
CLIENT PROJECT MANAGER MENTIONED THEY WERE HAVING A DIFFICULT TIME GETTING IMAGES TO ALIGN PROPERLY IN WORDPRESS CMS, MADE A JOKE THAT MAYBE SWITCHING TO A PROPRIETARY SYSTEM MIGHT HELP.	MEDIUM TO HIGH	1. WRITE DETAILED DOCUMENTATION ON WHAT SIZE IMAGES TO USE FOR CMS, WRITE DIRECTIONS ON HOW TO PROPERLY ALIGN IMAGES. 2. SEND CLIENT TEAM WHITEPAPER / ARTICLE ON 'BENEFITS OF OPEN SOURCE PLATFORMS.' 3. CONTINUALLY SHOW THEM THE BENEFITS OF WP BY GIVING THEM MORE TUTORIALS ON HOW TO INPUT CONTENT.	1. DESIGNER 2. ACCOUNT MANAGER 3. PROJECT MANAGER	1. LINK TO WHITEPAPER 2. LINK TO CONFLUENCE PAGE

BRAINSTORMING IDEAS / FINDING INSIGHTS

1 20/20's

Often used in sales, it's a way to come up with 20 ideas in 20 minutes, just start writing whatever comes to mind, go!!!

2 "JTBD" THEORY

The 'jobs to be done' theory is a different way to shape your solution by thinking about what job needs to be executed.

https://strategyn.com/jobs-to-be-done/jobs-to-be-done-theory/

3 LEAVE THE OFFICE

Take a walk, people watch, look at other systems and get inspired! Apply the things you see to the system you're trying to solve for.

INSIGHT CHANNELS

Anomalies
What deviates from the norm?

Confluence
What trends intersect or overlap?

Frustrations
What problems does the system currently have; how can you solve them?

Orthodoxies
How can we break from tradition/convention?

Extremities
How can we explore and exploit divergence?

Voyages
What can we learn from immersion in different areas of our customer's lives?

Analogies
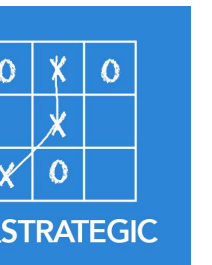What successful innovations are being applied in other disciplines and industries?

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OPPORTUNITIES

POTENTIAL OPPORTUNITIES	OBJECTIVES/GOALS	PRODUCT/SERVICES	TIMELINE/ BUDGET	EST. CLOSE DATE	STATUS

INNOVATION

INNOVATIVE SERVICE/PRODUCT	DOES IT SERVE A PURPOSE?	HOW CAN WE IMPLEMENT THIS?	HOW WILL THIS HELP OUR VISION?	HOW MUCH RISK DO WE PERCEIVE?	PRIORITY
ARTIFICIAL INTELLIGENCE: IBM WATSON ANALYTICS	WILL PROVIDE CLIENT WITH A PREDICTIVE ANALYTICS PLATFORM TO BETTER INFORM THEIR MARKETING DECISIONS	NEED TO READ DOCS. AND GET RELEVANT INFORMATION THAT CLIENT WOULD WANT TO TRACK OUTSIDE OF JUST ANALYTICS. MEDIUM LEVEL OF EFFORT	WE WILL BE SEEN AS INNOVATIVE AND MAY LEAD TO MORE WORK AS WELL AS MATERIAL FOR OUR BLOG	VERY LITTLE. WE HAVE ANALYTICS EXPERTS ON STAFF, THIS SHOULD BE THE NEXT EVOLUTION IN OUR GROWTH	MEDIUM TO HIGH

SECTION

5

ACCOUNT HEATLH
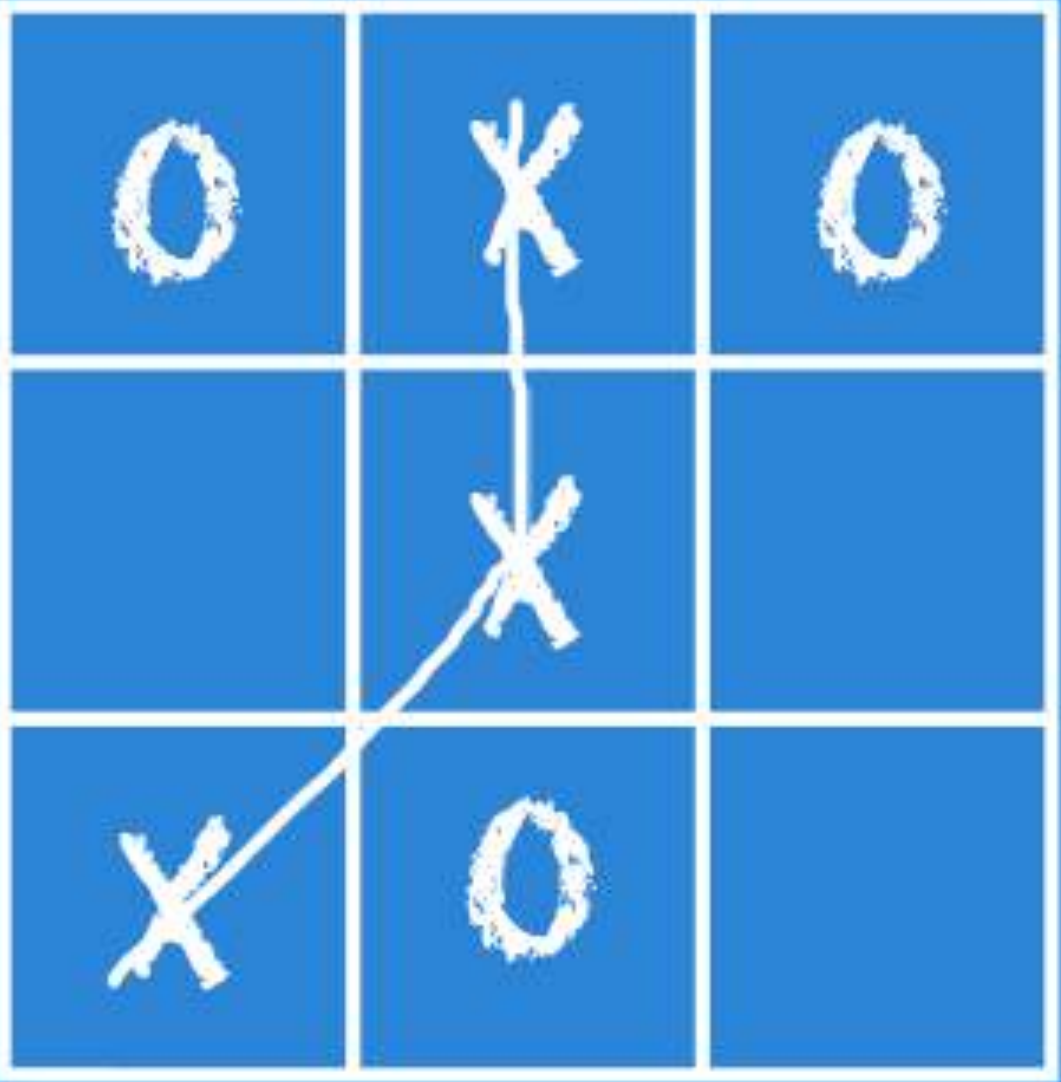### Continually Checking In

EVALUATION

RELATIONSHIP / COMMUNICATION:	
WHO IS OUR STRONGEST ALLY WITH THIS CLIENT?	
HOW COMFORTABLE ARE WE TO SPEAK CANDIDLY WITH THEM?	
DO YOU THINK THEY WOULD BE A GOOD REFERENCE?	
HAVE WE ASKED THEM FOR ANY REFERRALS?	
HAVE WE ASKED THEM FOR A TESTIMONIAL? OR HAVE WE DONE A CASE STUDY WITH THEM?	
WOULD THIS CLIENT BE WILLING TO PRESENT AT A TECH CONFERENCE WITH US?	
VALUE:	
DOES THIS CLIENT SEE VALUE IN OUR RELATIONSHIP?	
DOES THIS CLIENT SEE VALUE IN OUR SERVICES/PRODUCTS?	
HAS THIS CLIENT EVER EXPRESSED ANY CONCERN WITH OUR WORK?	
WERE THERE ANY PROJECTS THAT THE CLIENT WAS NOT SATISFIED WITH?	

EVALUATION

VALUE (CONT'D):	
WHAT IS THE OVERALL TONE OF THE DAILY/WEEKLY/MONTHLY CONVERSATIONS?	
HOW MIGHT WE BE ABLE TO IMPROVE OUR WORTH TO THIS CLIENT?	
FLEXIBILITY:	
HOW OFTEN DO WE CHECK IN WITH THIS CLIENT?	
HAVE WE BEEN OPEN TO CHANGING THE WAY WE DO THINGS FOR THIS CLIENT?	
WHAT ARE THE NATURE OF CLIENT INQUIRIES? (STRATEGY FOCUS, DEVELOPMENT FOCUS?)	
CAN WE KEEP UP WITH THIS CLIENT? OR ARE WE TOO FAR AHEAD?	
COMMENTS: ANYTHING ELSE WE SHOULD SAY OR ADD?	

STRATEGIC ACCOUNT PLAN

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