

Primary Market Research Worksheet I: Preparation

Make a new copy of this worksheet for each market segment you analyze.

1. Secondary market research sources and key lessons learned:

a. _____

b. _____

c. _____

2. Profile(s) of the people you want to engage with (e.g., description of end user, economic buyer, champion, industry analysts, influencers; description should be enough to help you identify, find, and deselect potential candidates. Can include demographics and psychographics—see Step 3 for more info):

1st Targeted Profile Name: _____

Description: _____

2nd Targeted Profile Name: _____

Description: _____

3rd Targeted Profile Name: _____

Description: _____

4th Targeted Profile Name: _____

Description: _____

5th Targeted Profile Name: _____

Description: _____

3. Your general recruitment script (be clear on who you are, why you want to engage, what you are asking for):

4. Initial candidate list to contact

Name & contact info	Profile type	Source	Why you want to engage with this person plus any other info to build rapport