



# Industry Planning Worksheet

Industry: \_\_\_\_\_ My Name: \_\_\_\_\_ Date: \_\_\_\_\_

Major Client in Industry	Top Executive	Annual Fees
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____

Major Prospects in Industry	Top Executive	Est. Annual Fees
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____

What are the problems that clients from this industry hire my firm to solve?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

What Trade Associations do our clients and prospects from this industry attend?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

What is my estimate of how many organizations from this industry could pay us more than \$20,000 in annual fees? \_\_\_\_\_

What publications / web sites do the clients and prospects read regularly?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

Who are two key industry opinion leaders in this industry? (Name/Firm)

1. \_\_\_\_\_
2. \_\_\_\_\_

What marketing activities do you recommend the firm do to attract clients from this industry?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

What else should we know about this industry before we market to it? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_