
MJC
MJC Management Services

The Sales Strategy Service

for producers and manufacturers

incorporating:

The MJC Review Service
The MJC Management Service

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Chapter 1 : Introduction

The MJC Sales Strategy Service offers Senior Managements of customer-focused manufacturing organisations specialist support as they strive to translate their Business Objectives into a practical, day-to-day selling effort.

It is based on two simple but profound beliefs :

- 1. Everyone contributes to the selling effort, therefore everyone must feel part of the Sales Strategy**
- 2. They must focus on building a solid foundation of truly profitable Products and Customers that support the strategic direction**

These two statements have huge implications : firstly, Sales Management and the Sales Force are not the only ones interested in what to sell and who to sell it to; many other people and functions support them and need to be involved in that decision. Secondly, to make those critical choices, they must have a mechanism to tell them what products and which customers will really take the company forward.

MJC places at the disposal of senior management two crucial specialist skills :

Getting the whole organisation to take ownership of the sales strategy

Analysing the product portfolio and customer base for strategic fit, significance and true profitability

The Service operates at two levels :

The Review Service is a Health Check on the current situation. It indicates to what extent the business is truly strategy-driven, how engaged the organisation is, (how solid the foundation of products and customers is, if included in the analysis), and potential options for Management to take.

The Management Service fully utilises the skills and experience of MJC to build a sales strategy from scratch. It is conducted by a carefully selected team drawn from the sales group and the business functions that support it, and fully facilitated by MJC. It translates the organisation's business objectives into a set of practical sales strategies that reflects the organisation's strengths and production capacity, will respond to changing circumstances, can be modified rapidly if necessary, and has Management's total understanding and full support.

The Management Service continuously reassures Senior Management that its strategic intent is being accurately translated into a robust and truly profitable day-to-day selling effort !

Who will benefit from the Sales Strategy Service?

The Service is designed for all manufacturing organisations, and particularly those that serve many customers with many products.

'The organisation' can be a company, a division, a business unit or a plant. The key characteristic is that it is the smallest unit that is accountable for its own performance, and has both the responsibility and the authority to manage its own manufacturing and approach to market, without reference to anyone else.

The Service makes two very important and necessary assumptions; firstly, that the organisation is driven by the needs and success of its customers; and secondly, that the board or senior management whole-heartedly endorse the programme.

Customer-driven organisations sincerely believe that they must fulfil their customers' needs better than their competition, if they are to sustain their profitability. To give themselves the best chance of doing that, they will select with great care the products they make and develop, and the customers to whom they offer them. Such organisations recognise that while the sales group has the primary responsibility to manage the selling effort, all other functions directly or indirectly support it. The sales strategy may therefore contain elements not directly connected with customers or with sales conditions, but which are nonetheless critical to the success of the strategy.

A fuller description of the customer-focused organisation is given in Appendix A.

The Service also needs the unanimous and whole-hearted support of the organisation's senior management, even if otherwise there is disagreement or conflict. In fact, the highly inclusive approach used by MJC can be very effective in overcoming conflict between departments and developing a shared ownership of the way forward. Whatever the situation, it is particularly beneficial when the senior management communicates a uniform and positive message to the organisation about the Service and their part in it.

What about smaller companies and others with few people?

MJC will happily customise the Management Service to make it accessible and appropriate to smaller companies, or to any others that would struggle to devote people to an intensive team effort while maintaining the business.

MJC can agree with the organisation's management to carry out some of the tasks himself, to assume direct responsibility for some or all of the process, and to become accountable for the outcome. However, he will make every effort to involve as many of the organisation's people as possible to ensure they understand and take ownership of the outcome.

Chapter 2 : Sales Strategy – an overview

What is Sales Strategy?

Sales strategy is the bridge between what an organisation sells today and what it wants to sell in the future to achieve its objectives.

It consists of a set of approaches and actions that articulate where the organisation will concentrate its sales effort, and what form that effort will take.

- ❖ 'Where' means what products in which markets and to which customers
- ❖ 'What form' means how the products will be sold, and under what conditions

Only by systematically identifying the markets, customers, products and selling methods that best suit the organisation, and actively engaging the people on the 'front line' and those who support them, will the organisation succeed in building a bridge robust enough to withstand the winds of uncertainty and change.

Once the bridge is built, those who carry out the selling function day-by-day can then develop detailed strategies for individual products and customers.

The 'Guiding Parameters'

Whether formally articulated or just 'understood', sales strategy is constructed and carried out within certain established parameters. These parameters may exist in written or tabulated form, or again they may just be 'understood'.

Whether reviewing an existing strategy or developing a new one, it is vital to understand fully the parameters within which the sales strategy operates or will operate. These 'guiding parameters' are:

- ❖ A Statement of Purpose (Mission), high level Objectives and Strategies
- ❖ An understanding of the organisation's strengths and weaknesses
- ❖ An understanding of external opportunities and threats
- ❖ A given Marketplace, perhaps with identified market segments
- ❖ A given manufacturing capability and plant capacity
- ❖ An established product range
- ❖ A set of customers already buying known quantities of products from that range
- ❖ A financial expectation, e.g. a target revenue, PBT (profit before tax) and RoI (return on investment)
- ❖ A time frame ('the next three years' is typical)

Profitability

Sales strategy does not by itself determine profitability, but it strongly influences the picture on both sides of the financial equation:

Sales strategy is totally responsible for revenue through its choice of products, product mix, markets, customers, and through its policies on pricing, distribution and relationships to customers.

Sales strategy also influences costs in a number of ways:

- ❖ The selling organisation, and any supporting functions that supply ancillary services such as technical support or customer service, are themselves overheads.
- ❖ Product Mix can limit or expand plant capacity, and hence concentrate or spread fixed manufacturing costs.
- ❖ Customers with long payment terms, poor payment performance, or whose demands result in high inventory, all add to the cost of capital.
- ❖ Forecasts, scheduling, quality and delivery promises that do not support the plant's smooth operation increase complexity, wasteful activity, and reject rates, all of which can reduce throughput as well as available capacity. Whatever it is, it will increase cost all round.

Sales strategy obviously aims to achieve the best prices it can in the most attractive markets. But to maximise financial performance, it must also optimise the products it sells, focus its effort on the most supportive customers, and aim for the most favourable contractual conditions.

The Sales Force

The sales force is the organisation's eyes and ears in the market. It is a basic expectation that they understand their markets and customers, and that they alert the organisation to both changes in customer expectations and requirements, and to opportunities that could be accessible if extra resources were made available.

These are integral elements of the sales function, and should not themselves form part of sales strategy. If there are weaknesses in these elements, actions to address them would be included in the action plan to implement the strategy.

Knowledgeable, experienced members of the Sales Force should fully understand and become champions of the strategy and act as mentors to their colleagues. This is crucial to ensure that the Sales Force as a whole develop 'ownership' of the strategy and embrace it enthusiastically.

Chapter 3 : Working with MJC

What?

MJC is the working acronym for MJC Management Services, the consultancy directed by Matthew Chuck that helps organisations to develop a practical strategic approach to their business.

Why work with MJC?

For the same reason that expeditions have guides as well as maps !!

It is of course possible to describe each process step by step, and indeed everyone will receive a detailed Service Guide at the outset.

However, the real value of the Service is that MJC is not only knowledgeable and experienced, but also a neutral observer, outside the organisation's internal relationships and with no responsibility for any of its operations. He will therefore have no vested interest in any particular outcome, not be distracted by day-to-day issues, and be able to dig deep and ask the searching questions that an internal person may not see, or may hesitate to pursue for fear of repercussions.

His experience and neutral vantage point also enable him to steer the organisation around the unexpected obstacles and hurdles they will certainly encounter, and which even the best written guide cannot anticipate. Problems such as these are often the rocks on which well-intentioned teams can founder if they do not have an experienced pilot to see them through!

Both Services are logical, systematic and practical, and are rooted in MJC's knowledge and experience of developing, implementing and reviewing sales strategy successfully in a manufacturing environment, as illustrated in the accompanying profile.

Who?

MJC will be appointed by and report directly to the Project's Sponsor, who will be an executive or senior manager. This clear, direct reporting relationship is very important, as MJC then has both the authority to carry out his duties and the channel of communication to resolve issues at the highest level if necessary.

How?

Once the scope of the assignment has been agreed with the Sponsor and recorded in the Service Agreement between MJC and the organisation, both services begin by setting out the Guiding Parameters within which the sales strategy has been or will be developed.

At the first meeting with the Sponsor, MJC will request background information on the organisation, agree the personnel to be interviewed, set up the first interview sessions, and arrange to distribute the appropriate Service Guide (the manual for use by the organisation that details the steps of each process).

MJC will then study the background information and conduct a series of interviews over two days, from which he will write a report detailing his understanding of the Guiding Parameters, for presentation to the Sponsor. This report serves as the basis for both services, so the Sponsor is requested to agree or modify the report, as appropriate, before MJC proceeds to the next steps.

The Review Service is described in Chapter 6. Each session consists of a series of interviews with appropriate personnel over one day, at the end of which the Sponsor receives a verbal summary, and within two weeks a written report and presentation.

The Management service is described in Chapter 7. It starts with the selection of the Sales Strategy Development team, when MJC will use his knowledge, experience and familiarity with the strategy development process to guide the Sponsor and his colleagues in the team selection.

MJC will then participate in each step, working with the Service Guide and a set of prepared 'facilitator's notes' to guide the team through the process, ensuring they understand what is expected and can work unaided. He will also review the outcome of each step with the team to ensure they are confident in their work and can move to the next stage.

Where appropriate, reference is made in the Service Guide to any task or skill where MJC can be of particular help.

When/how long?

After three or four Review sessions, MJC will assess with his Sponsor whether they should continue in the same or modified form, or whether he should take a more pro-active role in developing and/or implementing the sales strategy. This will hinge on how well the strategy is being implemented, how effective it is, and how deeply the associated strategic thinking is becoming embedded in the organisation's culture.

For the Management Service, MJC will be at the organisation's side from the beginning to a point when the organisation feels the implementation of the process and the strategic thinking behind it are fully embedded in its culture. Even the most receptive and progressive organisations would expect this to take at least 12 months.

Remuneration

The fees will be commensurate with the intensity of the programme and the level of responsibility and accountability involved. They will be structured to be fair to both parties, very simple to administer, and above all, subject to the client's continued satisfaction with the performance of MJC.

Generally, the fee will be a fixed amount per month (for the Management Service) or per quarter (for the Review Service). The receipt of the first fee starts the process. There are no extra charges of any kind, ensuring that the outlay is fully predictable and under control. Either service can be cancelled in writing at any time without notice, so limiting a client's financial risk to one month's or one quarter's fee.

Once the scope and conditions of the assignment have been agreed, they will be set out in a Service Agreement that will govern all aspects of the relationship.

Chapter 4 : The Preliminaries

What?

These are the initial exchanges between the organisation and MJC, up to the point when the organisation decides it will work with MJC at one of the Service levels.

Why?

This brochure and a profile of MJC will have been presented to the organisation in response to their enquiry for information, and in advance of a preliminary meeting. This chapter sets out what the organisation may expect from that first discussion.

Who and How?

Both MJC and the organisation can use this brochure as a guide to establish some basic information about each other, and to allow the organisation to clarify any points specific to its circumstances. Together, MJC and the organisation can then assess what level of service might be appropriate and of value, and how they can work together to achieve the organisation's objective.

MJC would then submit a written proposal in the form of a draft Service Agreement, which after negotiation and joint signing, signals the beginning of the programme.

When/How Long?

This discussion will take no more than 2 hours, supported if appropriate by a presentation that reflects the structure of the brochure. However, MJC will always allow more time if requested, in case, for example, the organisation wishes to go into greater detail or to incorporate a plant tour.

Chapter 5 : The Guiding Parameters

What?

Sales strategy is developed and carried out within certain established parameters, and whether reviewing an existing strategy or developing a new one, it is vital that there is common understanding of them at the outset.

Why?

In order to achieve the business objectives, the ideal sales strategy not only works around the organisation's strengths and opportunities, but is firmly rooted in today's reality. An honest and complete appraisal of the current position is therefore vital, whether building the bridge from scratch or assessing the effectiveness of the bridge already in place.

Who and How?

Whichever service the organisation requires, MJC will start by studying background information on the organisation, and then conducting a series of interviews with the project Sponsor and a cross-section of the organisation. He will thereby generate a summary analysis of the business, which he will ask the Sponsor to confirm. This serves three purposes :

- ❖ it ensures that MJC has an accurate picture of the business and its current situation, that is shared by the Sponsor and the senior management;
- ❖ it establishes the 'guiding parameters' within which the sales strategy is to be reviewed or developed;
- ❖ it signals to the organisation that they are already involved in an exciting and highly rewarding project !

The report will include:

- ❖ A Statement of Purpose (Mission), high level Objectives and Strategies
- ❖ the organisation's strengths and weaknesses
- ❖ the external opportunities and threats
- ❖ the marketplace, perhaps with identified market segments
- ❖ the manufacturing capability and plant capacity
- ❖ the product range
- ❖ the customers buying products from that range
- ❖ a financial expectation, for example a target revenue, PBT (profit before tax) and RoI (return on investment).
- ❖ a time frame ('the next three years' is typical)

- ❖ If the organisation has commissioned the Review service, the report will additionally include the current Sales Strategy, with its underlying assumptions, objectives, intermediate targets and progress to date.

The report is discussed with the Sponsor and his senior management colleagues, modified where necessary and appropriate, before he or they sign the document as a true and accurate reflection of the business as it impacts on sales strategy.

When/How Long?

This step will normally require two days of interviews. The report will be presented to the Sponsor within 2 weeks, followed by a half day presentation to the senior management.

Chapter 6 : The Review Service

What?

The Sales Strategy Review Service is the systematic and regular analysis of an existing Sales Strategy, focusing on :

- ❖ whether the basic assumptions that underpin it are still valid,
- ❖ how well it is being implemented
- ❖ how effective it is in achieving the objectives
- ❖ the impact of these findings on the sales strategy
- ❖ options that the organisation may consider.

The findings are presented in a comprehensive written report, as well as presented to the board or senior management team.

Why?

This regular review enables the senior management to maintain strategic focus on perhaps the most important element of its business strategy : its relationship to the market and its longer-term direction. If today's customers are not generating the funds to sustain the organisation, and equally importantly, if tomorrow's customers will not generate the funds to enable the organisation to prosper longer-term, the sooner the management is alerted to it, the better.

In the intense pressure of managing operations day-to-day, the focus is very much on operational excellence and short-term results. These are very necessary, of course, but it can be very difficult for senior managers to take the time to adjust the mind-set to 'strategic' and view the operation's activities through the lens of their strategic impact.

The Review Service enables the senior management to take that time, adjust their thinking, and determine whether the strategic framework is still sound or needs adjustment. By doing this every three months, adjustments can be made relatively painlessly and without gross disruption to the organisation.

Who and How?

At the outset, MJC and the Sponsor agree an interview schedule with a cross-section of relevant managers and staff, together with the information they will be expected to have available.

MJC then conducts the review by asking each interviewee a set of questions appropriate to his/her position, the answers to which when taken together address the key questions:

- ❖ Are the parameters and assumptions still valid?
 - ❖ How well is the sales strategy understood and deployed through the organisation?
 - ❖ Is the implementation proceeding according to plan?
 - ❖ Are the implemented steps having the desired effect?
-

- ❖ What impact do these findings have on the sales strategy ?
- ❖ What options are there ? Which would best meet the primary objective?
- ❖ What is the financial impact of the findings and of the proposed options?

This is then presented to Management both verbally and as a written report.

If required and agreed beforehand with the Sponsor, MJC will undertake an analysis of the product portfolio and customer base for strategic fit, significance and profitability. This can be done by MJC alone, but is much more effective when conducted by a selected group of the organisation's staff, facilitated by MJC. As well as achieving a better and more convincing result, it is an excellent way to introduce the Management Service to the organisation, and to start to achieve the ownership of the process that will really make the difference.

When/How Long?

Each review will require one day of interviews, at the end of which the Sponsor receives a verbal summary, and within two weeks a written report, followed by a half day presentation to management.

It is expected that the review will be repeated quarterly, and that after two or three reviews, MJC will be able to observe how the organisation is responding and to recommend whether the review process should continue, or whether the organisation would benefit from developing and implementing a new and more inclusive sales strategy.

Chapter 7 : The Management Service

What?

The Management Service operates in three sequential phases. The first phase analyses the guiding parameters established in Chapter 5 in detail, and develops a strategic sales plan for approval by Management. The second phase is the presentation to Management and Management's approval to proceed (or request for modification). The third phase is implementation across the organisation, and a regular review identical to the Review Service described in the previous chapter, but conducted by the organisation's own staff.

Why?

The objective is to build the bridge between what is being sold today and what the organisation wants to sell in the immediate future to achieve its objectives. This approach systematically identifies the markets, customers, products and selling methods that best suit the organisation, and actively involves the people on the 'front line' and those who support them, to gain their ownership and commitment.

Who?

The strategy is developed, approved, implemented and reviewed by certain 'key players' :

The **Sponsor** commissions the project, appoints the people who will conduct it, sets the timetable and terms of reference, receives regular progress reports, helps to resolve organisational issues and roadblocks, receives and approves the Strategy plan for presentation to the board, and oversees its implementation and review afterwards. This person is likely to be the Sales executive on the board or senior management team.

The **Project Manager** manages the project day-to-day and leads the development and implementation teams. This person is likely to be the Sales Manager or a senior Sales Representative/Account Manager.

The **Consultant** facilitates the entire process, using his knowledge and experience to advise the Sponsor and Project Manager, guide the teams through their tasks, ensure they keep to the timelines, and help them to overcome obstacles. He also ensures that all parties, but especially management, confront the awkward questions and decisions that an internal facilitator may not recognise or may be reluctant to press. Unlike the other players, his role will end when the company feels that the strategic thinking behind the project has become sufficiently embedded in the company's culture.

A **Development team** conducts the detailed analysis and formulates the Sales Strategy.

The **board or senior management team** receives, discusses and approves the Strategy.

An **Implementation team** deploys the Strategy through the organisation, and reviews its progress at frequent and regular intervals.

How?

Analysis and Development Phase

Within the guiding parameters, the development process proceeds in six steps:

1. Select the Team that will conduct the analysis and development.

This approach ensures that the sales strategy is based on the widest knowledge and insights, sends a powerful message to the organisation of Management's commitment, and paves the way for successful implementation later on.

2. Segment the market into manageable pieces, each with its own distinctive characteristics and drivers, and select the most attractive for the organisation
3. Optimise the current product mix and customer base ('strategic renewal').

This ensures the business has a solid foundation of strong profitable products sold to strong, supportive, profitable customers

4. Identify the products the targeted market segments are going to need in the future, and the value they will attach to them.
5. Match this requirement to the organisation's technical and manufacturing capability, its plant capacity, and financial objectives.

This is to ensure that the organisation directs its efforts where it can best keep pace with, influence, and profit from the changing market, and can decide whether inaccessible opportunities (either immediate or potential) will reward the investment of resources necessary to access them.

6. Frame a strategy that :

A concentrates the sales effort on:

1. the products that best reflect and reward the organisation's technical and manufacturing capability, and best utilise its plant capacity
2. the market segments, and individual customers, that are most closely aligned with the organisation's growth objectives, and most value its products and services

B identifies the level of attention, and the key selling arguments and skills, required for each market segment.

C Is clearly compatible with the financial objectives

Management Approval Phase

The sales strategy is now ready for presentation to the senior management team for its approval. This is ideally done by the team in a dedicated half-day session, with plenty of time for discussion and clarification.

Senior Management has its own responsibility at this point. It must either approve the strategy and instruct implementation to begin, or require it to be re-submitted with whatever modifications they require.

They cannot just 'sit on it'. That would send the worst possible message to the organisation !!

Implementation and Review Phase

By all means celebrate a mighty achievement, as long as everyone realises that having built the bridge, now they must cross it ! Now is not the time to let up or assume the Plan will implement itself !

1. Select the Team that will implement and review the strategy.

This ensures continuity and focus on getting the job done, but as importantly, maintains the momentum, ownership and responsibility among all the players that have been generated up to now.

2. Roll out the plan to the sales force and to all the functions that support them.

This is a combination of formal presentations and discussions, and informal, continuous mentoring of individuals by their managers and peers. The objective here is that everyone understands and acknowledges their role in the sales effort, and can make their own detailed plans.

This is where Management's strategic intent gets finally translated into the myriad everyday actions that make up the day-to-day sales effort.

3. Establish a regular review procedure

This is what keeps people involved and accountable, and ensures the plan remains live and alert to changing conditions. It also acts as an indicator to Management how well the ideas and routines are becoming integrated into the organisation's culture, which is the principal reason for retaining the Consultant's services well into this phase. It is conducted by the team but otherwise proceeds in the same way as the Review service in Chapter 6.

When/How Long

The time span very much depends on how intensively the organisation works and how complex its business is. It will probably need at least three months to conduct the analysis and present a strategy to management for approval, but even a complex business should aim to complete it in six months.

Implementation should proceed rapidly after Management's approval, with frequent reviews at first, before settling to a regular quarterly routine as the ideas and actions 'bed down'.

Appendix A

The Customer-focused manufacturing organisation

Most organisations will claim to be 'customer-focused' but in reality the focus for many diminishes rapidly once outside the sales group. This note examines some of the characteristics of a truly Customer-focused organisation as they affect the development and implementation of sales strategy.

Customer-focused organisations aim to fulfil their customers' needs better than their competition, while sustaining their profitability. They will therefore select with great care the products they make and develop, and the customers to whom they offer them, because once they have decided, they effectively put themselves in their customers' hands. They will therefore be very sure what products and services their chosen markets will need and value, and select only those they are confident they can manufacture, distribute and support profitably. They will also strive to work with those customers whose business is in alignment and who value what is offered.

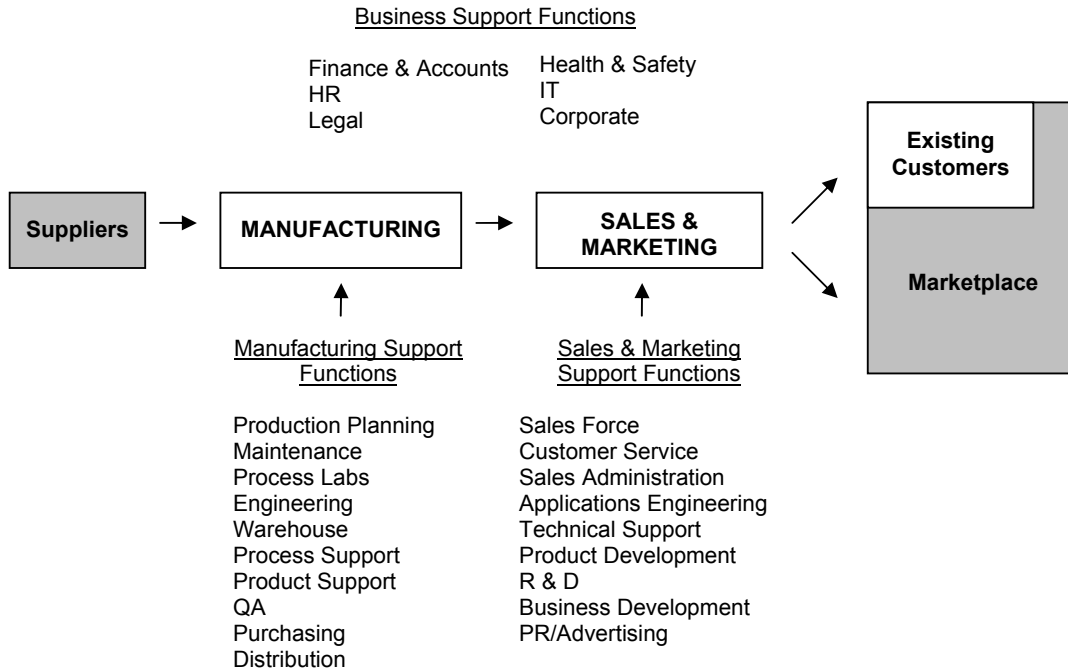
Such organisations recognise that while the sales group has the primary responsibility to manage the selling effort, all other functions must directly or indirectly support it. To visualise what this means, it is helpful to depict a manufacturing company in its simplest form, obtaining raw materials and components from its suppliers, processing them into finished products in a production unit, and selling them to a variety of customers representing its share of the 'market-place'. (see the diagram on the next page).

Producing the finished products requires a number of supporting operations such as maintenance, quality assurance, and production planning, and likewise selling them requires supporting operations such as sales administration, technical service and product development. Supporting all these activities are general business functions such as Finance, HR, and Health and Safety.

It is dramatically clear that the sales force can do nothing in isolation. They rely on all those other functions to carry out their specialised tasks in support of the profitable sale of the organisation's products. In a customer-focused organisation, all these support functions will gear their activity to what supports the sales effort best.

All these functions come at a cost, of course. Obviously, their cost should be less than the value they bring, so logically the organisation will want to direct their efforts where they will bring the most value. The organisation will therefore strive to offer only the most profitable products, to the most receptive customers. Any product or customer which absorbs more output of a supporting function than it pays for will not only waste company resources, but divert them from products or customers which need and deserve them, and on which the organisation's future depends.

The sales group therefore has a clear responsibility to identify and target the most appropriate customers and products. However, with the direct and indirect involvement of so many other support functions in the selling process, it is also clearly in the organisation's interest to involve them to gain their insights, understanding and commitment to the selling effort. This is directly reflected in the teams that develop and drive the implementation of the sales strategy.



Appendix B : Background Information

MJC and the Sponsor can use the following checklist to determine what information provided at the outset will significantly speed up the initial meetings and analysis:

Company Brochure

Annual reports for last 1-3 years

Organisation Chart with names of directors, key managers and their staff

‘Balanced Scorecard’ or other high-level functional objectives and indicators

MOST and SWOT analyses

Products/Services

- List of Product/Services**
- Manufacturing/Production Process**
- Process Diagrams**
- Quality records**
- Costing method**
- Approach to Product Development**
- New products launched in last 3 years**
- New product performance**

Sales

- Sales objectives and strategies**
- Market analysis**
- Overview of Customers**
- Sales data**
- Pricing methodology**
- Customer Complaint records**
- Payment performance**
- New customers obtained in last 3 years**
- Customers lost in last 3 years**

Sales Channels

- Direct / Agents / Distributors**
- Domestic / Export**

Marketing Methods

- Approach to Market**
- PR/Advertising strategy**
- Sample advertisements**
- Mailing Schedule**
- Sample mail piece**
- Sample PR Brief**

Financial

- A recent Balance Sheet, P&L, Cash Flow**
- Financial performance in last 3 years**