



# **SITUATION ASSESSMENT DISCUSSION GUIDE**

Bay Street Group  
13 Atilda Ave., Suite 200  
Dobbs Ferry, N.Y. 10522 USA

Phone (914) 674-4531  
Efax: (425) 988-7736  
[rtelberg@baystreetgroup.com](mailto:rtelberg@baystreetgroup.com)

## **How to Use This Discussion Guide**

This Discussion Guide is designed to be used as an aid by leadership teams in determining strategic strengths and weaknesses, opportunities and threats, and in uncovering new ideas and forging common visions.

It is recommended that each member of the leadership team take an individual copy of the questionnaire and answer the questions in private, perhaps out of the office or at home.

Then, a team meeting should be convened to compare and analyze each individual's answer. At this stage, use of an independent facilitator may be advisable. By comparing every member's notes, each member's perspective, judgment and information may be thoroughly evaluated and discussed.

Complete agreement on all points is, of course, rare among a group of independent-minded leaders. But areas of consensus can be acted upon without delay, areas of difference can be more fully understood, and areas in need of additional investigation can be identified for follow-up.

Bay Street Group is available at any step in the process for services in facilitation, research, analysis or consultation.

*Let's get started....*



## **Market Trends**

4. What are the top 3 trends you are currently observing in this market?  
(Over the next short term, within 2 years? And over the long term, 3-5 years?)

1...

2...

3...

5. What business problem(s) is this market trying to solve with your products?  
(i.e. efficiency, privacy, security, etc.)?

6. What are your Strengths in this market?

7. ... Weaknesses?

## **Competitive Factors**

8. Who is your biggest competition in this market? Why?

9. What is the competition doing that is most effective? Least effective?

10. What can you do to compete more effectively in this market?

## **Products, Services and Solutions**

11. What products are hot in the market right now? Which are not?

12. What are the most important purchase criteria for this market (price, ease of purchase/use, brand, quality, appearance, total solutions)?

13. What combination of products (i.e.: marketing support, presentation materials, etc.) would be a “great solution” for this market?

## **Opportunities**

14. What partnership/co-marketing opportunities would you consider?

15. What messages, or combination of messages, resonate most effectively with this audience (i.e. service, quality, price, ease of use, brand, efficiency, security, etc.)?

## **Reaching and Serving Customers**

16. What is the best way to reach customers in this market (key media, key events, listservs, etc)?

17. What can you do to improve the buying experience for customers?

## **Identifying Key Opportunities**

18. Where do you see the greatest opportunities for growth in this market? New markets?

## **Additional Information**

19. Is there anything you would like to add that we haven't covered?  
(Additional information may be appended as needed.)

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Signature

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Title

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