

## SPG MarketScope

### What is the risk the business you are considering will miss its projected revenue goal?

#### Real World Experience

In addition to assessing core financials and management in place, investors need both qualitative and quantitative insights about the viability of the business.

SPG offers a uniquely effective process to find answers to some of the tough questions investors face. The process is based on:

- Expertise in assessing marketing and business plans across multiple business categories, as well as consumer and B2B business models
- Expertise in identifying, collecting and assessing marketing data.
- Proprietary market research and modeling tools to assess business hypotheses, products, marketing programs
- Experience in running marketing departments and building businesses in addition to academic and consulting expertise

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#### Overview

Investing in companies always carries some risk. Using our proprietary SPG MarketScope to explore the potential investment from the lens of marketing can reveal critical insights in:

Understanding the risks and upsides of the overall business strategy and revenue goals

Scale, scope and effectiveness of marketing strategies, activities and spending required to meet business goals

#### Methodology

##### Step 1 – Test the business strategy to determine if it is likely to generate the projected results

Size the market (competition, market demand, geographic expansion)

Test for strengths/weaknesses using brandDelphi™ (a unique research tool)

- Test current products/services
- Test relationships with the distribution channels
- Test relationship with customers

Test hypotheses on growth and strategy using Idea Map® (a proprietary research tool)

- Test potential product concepts
- Test proposed business/product/name mergers

##### Step 2 – Conduct a Marketing Audit to reveal strengths or issues

Does marketing effectively use the budgets provided

- Which marketing activities are most effective? Which ones don't add value? A return on marketing investment analysis can be conducted (ROMI).
- Are marketing activities developed from a clear marketing positioning and strategy and are they consistent with the overall business strategy?
- Is the strategy development based on an assessment of SWOT
- Are appropriate measurement tools and testing strategies in place to offer learning for the future?
- Are the choices made about channels based on data and experience (e.g. tv, print, direct response, online initiatives, events, public relations)?

Is the marketing staff sized appropriately? Is it effective and does it have appropriate support across the organization?