

## Pre-Worksheets *(yep, this is homework!)*

Congratulations! You are soon to be included in an exciting strategy session focused on aligning the A&D strategy in your market. Please take a few moments to fill out the below questions to the best of your knowledge prior to the scheduled session. It's OK if you can't answer all of them! You have been asked to participate because what you bring will add value to the session. We are interested in your knowledge and experience. The more thought you put into this pre-work, the more productive your session will be. Be sure the knowledge you bring is based on recent events, experiences and conversations. Please take enough time prior to the session to give thoughtful answers.

Who are the **biggest** firms in your area? What nationally based firms are strong in your region?

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

Who are the **busiest** firms in your area? Whose names do you hear of most on RFP's? Ask firms who they most frequently compete against?

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

Which firms are already **friendly** to your brand or partner brands?

Have we missed out on opportunities recently because we **weren't embedded** in the A&D firm? (Poll your other team-members on this one!) If so, which firms?

- 1.
- 2.
- 3.
- 4.
- 5.

Who are the **small but steady** firms?

- 1.
- 2.
- 3.
- 4.
- 5.

Who has had the **fewest layoffs** in recent downturns? Long time staff? Is anyone hiring?

- 1.
- 2.
- 3.
- 4.
- 5.

Look at vertical markets, who are the **prominent** firms in **Healthcare**?

- 1.
- 2.
- 3.
- 4.
- 5.

Who are the prominent firms in **Education**?

- 1.
- 2.
- 3.
- 4.
- 5.

Who are the prominent firms in **GSA**?

- 1.
- 2.
- 3.
- 4.
- 5.

Who are the prominent firms in **Corporate**?

- 1.
- 2.
- 3.
- 4.
- 5.

Where do other **reps/dealers** seem to be **swarming**? (i.e. I can't go into this firm without seeing 10 plates of cookies half eaten and running into my top 3 competitors) Where do you feel like a nuisance every-time you go in there? Where are dealers you partner with well already in?

- 1.
- 2.
- 3.
- 4.
- 5.

Who seems to be **hungry for/honored** by your **attention**? Where are your competitors NOT focused?

- 1.
- 2.
- 3.
- 4.
- 5.

Where are your key **relationships**? Where have you gotten business in the past? (Can you pull project records for this?)

Team member	A&D Firm Name/Contact	Projects
<i>Ex. Susie Smith</i>	<i>EXG, Robin Lewis</i>	<i>CMG Marketing 300K (2016), Law firm conference rooms 400K (2018), Bruxby's (books in 2020) 100K</i>

Do you have any specific market expertise that might be valuable to specific firms? (i.e. LEED AP, experience in a vertical market like healthcare, etc...) If so, please list below:

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Are you involved in any extracurricular organizations (IIDA, ASID, USGBC, etc...) where A&D are present?

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