

MARKET INTELLIGENCE CHECKLIST

The 8 Categories of Client Research

Use this checklist for every new client engagement. Complete each category to build a comprehensive market intelligence report.

1. Market Size & Opportunity

Decision: Is this market worth pursuing? How big can this client get?

- Total addressable market (TAM) in dollars
- Customer base size (housing units, businesses, etc.)
- Average project/transaction value in region
- Growth indicators and market trends

2. Competitive Deep Dives

Decision: Where do we position? What can we say that they can't?

- Business profile and history for each major competitor
- Online presence audit (website, SEO rankings, social)
- Review analysis (star ratings AND specific language used)
- Messaging, positioning, and pricing signals

3. Additional Competitors

Decision: Who are we really fighting for attention?

- Who ranks in search results (beyond named competitors)
- Lead aggregator presence (Angi, Thumbtack, etc.)
- National brands operating in the market
- Emerging threats and new market entrants

4. Lead Aggregator Landscape

Decision: Buy leads, build owned channels, or both?

- Platforms active in this industry
- Cost-per-lead by platform
- Competitor usage patterns on each platform
- Platform dominance in local search results

5. Customer Acquisition & Behavior

Decision: What do we say, where, and when in the buyer journey?

- Primary decision factors (ranked)
- Research behavior patterns (how do they find vendors?)
- Trust signals that convert (certifications, reviews, etc.)
- Typical sales cycle length

6. Digital Marketing Landscape

Decision: Which channels deserve budget? Where can we win?

- Search landscape and keyword opportunities
- Paid advertising intensity and costs
- Social media norms for the industry
- Content gaps to exploit

7. Industry Dynamics

Decision: What timing and compliance factors must we account for?

- Seasonality patterns
- Licensing and regulatory requirements

- Industry certifications that matter
- Economic factors affecting demand

8. Positioning Opportunities

Decision: What's our angle? How do we win?

- Gaps in competitor coverage
- Underutilized messaging angles
- Underserved customer niches
- Quick wins vs. long-term strategic plays

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