

Environmental Scan Checklist

The following information is essential for conducting an environmental scan, beginning the planning process and identifying where there might be data gaps. The information can be found in both internal and external documents.

- 1) Statement of your organization's Mission, Vision and Values
- 2) Current Strategic Plan
- 3) Current Year Operational Plan
- 4) Environmental Scan
- 5) Competitive Analysis
- 6) Current Year Marketing Plan(s)
 - a) Comprehensive marketing plan for the association
 - b) Individual marketing plans for specific departments/divisions or product lines (e.g., membership, publications, education, etc.)
- 7) Member/Customer Research
 - a) Member/customer profile
 - i) Demographic data such as age, education, income, gender, location, etc.
 - ii) Lifestyle data: Are there differences in how members live their lives and the role the organization has in their lives?
 - iii) Segmentation data: Are there differences in what members seek/want and receive from the organization?
 - iv) Behavior data: What do they do?
 - v) Usage data: level of interaction with organization, level of purchasing from organization, average users share of requirements, annual meeting attendant profile (what are the differences?)
 - b) Member/nonmember needs assessments
 - c) Member/customer satisfaction research
 - d) Member/customer loyalty research

- e) Member recruitment and retention research
 - i) Annual net growth/decline
 - ii) Renewal rates
 - iii) Conversion rates
 - iv) Dollar cost of recruiting a member
 - v) Dollar cost of retaining a member

- f) Product and/or Services Research
 - i) Publications
 - ii) Conferences and Seminars
 - iii) Technical Services
 - iv) Other
 - v) Purchase cycles for products and services (What percent buys/engages more than once a year?)

- 8) Brand research
 - a) Image and perception studies
 - b) Positioning studies
 - c) Brand value and equity studies

- 9) Organizational Development Research
 - a) Employee opinion surveys
 - b) Staff turnover rates
 - c) Professional development needs assessments

- 10) Financial Data (Operating budget)
 - a) Non-dues/dues revenue ratio
 - b) Cash reserves/expenses ratio
 - c) Promotion dollars/sales dollars ratio
 - d) Marketing budget
 - e) Marketing allocations