

[date]

Hello, \_\_\_\_\_ and \_\_\_\_\_,

Thanks very much for inviting this proposal for market research for the \_\_\_\_\_ Area Chamber of Commerce.

As we discussed earlier in the spring, the chamber is working with the general idea that \_\_\_\_\_ is a “good” place to live, but the chamber would like to help move it up to be a “great” place. Research can help determine both the actions needed to accomplish that and branding/marketing to promote it.

As you have already learned, a pre-packaged branding campaign is not the answer to your challenge. While there are many well-known tools to apply to your goals, your plan should grow from research designed specifically for your situation, not from a cookie cutter. That research plan lays out in several phases, over a span of six to 18 months or longer.

- Define the project
- Research in the community
- Research-based plan for execution
- Implementation

I believe I can help you with the first three of these phases. Let me give you a specific bid on the first phase, with more general estimates of those that follow.

### **Phase I: Define the project**

One of the great strengths of community groups such as the Chamber of Commerce is the wealth of experience and viewpoint of the members. Conversely, that diversity of experience and viewpoint can work against a shared understanding of, commitment to, and ability to realize the group’s goals and objectives.

It is critical to start this project from the clearest possible understanding of its goals, likely progress, and potential outcomes. So I suggest we start with a three-step facilitated discussion (which I would lead) including all your important constituencies:

- Initial meeting with chamber marketing committee to determine the scope of the project, the major questions to be investigated, and the stakeholders to include in a larger meeting. Plan for 90 minutes to 2 hours around a conference table.
- Facilitated discussion with all the stakeholders, perhaps up to 30 people. Plan for one or two half-day sessions in a meeting room with conference tables. This could take place as soon after the initial meeting as it can be arranged—the larger the group, the longer it will take to find a date when all can attend.
- Presentation of findings and recommendations for further action to the marketing committee, probably another half-day session around a conference table. This could take place a very few days after the larger discussion.

At the end of this process, we should have essential agreement by the stakeholders on shared goals and objectives for the long term project.

### **Consultant fees:**

The fee of \$\_\_\_\_\_ includes

- Initial face-to-face meeting with the chamber marketing committee in your city to define the scope of the project and research goals.
- Development of the large-group discussion guide (with time for revisions and review calls over 2-3 drafts).
- Work with AV rental and chamber staff to make meeting arrangements. (AV fees may be billed directly to the chamber; we can decide how best to handle that as we begin the project.)
- Travel to meetings and conduct of all group discussion(s).
- Analysis of findings and recommendations for further action.
- Comprehensive final report of the project.

In addition, expenses would include meeting space and catering for the large group session(s), my mileage/travel (likely to be under \$200 total) miscellaneous materials and AV rental (which could range from \$100 to \$500 depending on a variety of factors to be determined). These are estimates only; expenses are charged at actual cost. So, total costs would likely be in the neighborhood of \$5,700.

#### **Timeline:**

Week 1: Project definition meeting; set tentative large group discussion date(s).  
 Week 2: Develop discussion guide; begin recruiting participants; begin meeting/catering arrangements.  
 Week 3: Review/revise discussion guide.  
 Weeks 4: Conduct large group discussion.  
 Week 5: Analyze findings; prepare report.  
 Week 6: Deliver report.

This is a best-case timetable—the wild card is finding dates when all the stakeholders can meet.

#### **Deliverables:**

- Drafts and final copy of recruiting materials.
- Drafts and final copy of discussion guide(s).
- Comprehensive final report of project, including analysis, recommendations for action and further research, and extensive verbatim comments from large group discussion(s).
- Recordings of groups.

### **Phase II: Community research**

Once we know just what the chamber wants to accomplish, we can look for the best ways to accomplish it. We will almost certainly need more information from constituencies we identify in Phase I, which may range from business owners already well-known to the chamber, to the public at large. The nature of the research you might need, though, is impossible to know until we complete Phase I. It's reasonable to think it would fall into one of two general categories.

- Focus groups—Likely a \$10,000 to \$15,000 proposition over a period of 8-12 weeks after delivery of the Phase I report.
- Survey research—Harder to estimate, since costs and timetable vary considerably by research goals and methodology. A short online survey of a small-to-medium sample from a list you define could be done in less than 4 weeks and under \$10,000. A random-digit-dial telephone study with a representative sample from a defined geography would probably be an 8-12 week project upwards of \$30,000. These are not interchangeable options—the questions you need to answer will determine the methods needed to answer

them. Conversely, the methods your group can agree to use and fund may help you narrow the list of questions you seek to address.

### **Phase III: Plan for execution**

This can, in some measure, work alongside Phase II. We will almost certainly identify some action items in Phase I that don't depend on further research, and for those we can begin planning immediately, adding research-based items as the research proceeds. Until we complete Phase I and get a start of Phase II, however, it's almost impossible to know what the costs and timetable for Phase III might be. For very general planning purposes, I suggest you think of this on a longer timetable but with comparable costs to Phase I.

### **Phase IV: Implementation**

Here is where the chamber will need the help of marketing and advertising professionals. You may have the right mix of people in your membership, or you may look for third party agencies. The research you do in Phases I and II will help you understand the right mix to seek out for Phases III and IV.

So you can see, \_\_\_ and \_\_\_, that overall we are looking at a plan stretching over several months or several years, depending on the vigor with which the Chamber of Commerce pursues it. At the most aggressive end, Phases I and II would consume at least four months, and quite possibly up to a year even with a steady commitment. Phase III could add another 1-12 months, and implementation would be ongoing. Costs of all phases could range from \$10,000 to upwards of \$100,000 depending on many, many factors.

### **Other considerations**

As we discussed when we met in \_\_\_\_, the researchers you are talking with bring you different and distinctive strengths. Full service agencies offer relatively deep skills under one roof, but that one roof comes with relatively high overhead. As a sole proprietor with a limited client list, I bring you an intense focus on your project, with almost no overhead. You may find both models appealing, and you may be able to take advantage of that by using different providers for different phases of your work, as appropriate. I'd be happy to discuss this possibility if it will serve your purposes, as well as any other questions you might have or revisions you may need in this proposal before taking it your members, so please don't hesitate to call.

Thank you again for this opportunity to work with the \_\_\_\_\_ Area Chamber of Commerce, and I look forward to continuing our discussions.

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