

Primary Market Research Worksheet II: Execution

Make a new copy of this worksheet for each market segment you analyze.

1. **Which profile are you engaging with:** _____
How well does this person fit the profile: _____
Type of engagement (e.g., interview, observation, test, immersion, other): _____

2. **Your general script/framework for engagement (Guidance: open-ended → qualitative insights/hypotheses → [if appropriate] quantitative insights/hypotheses and data) (approximately 5 key items):**
 - a. _____

 - b. _____

 - c. _____

 - d. _____

 - e. _____

3. **What did you learn?**

4. **What surprised you?**

5. **Which hypotheses did you seem to confirm? How and why?**

6. Which hypotheses did you seem to invalidate? How and why?

7. Which hypotheses were you unable to reach conclusions on? Why?

8. What new questions were raised in this engagement?

9. List of additional future candidates obtained from current candidate

| Name & contact info | Profile type | Why does the current candidate think we should engage with this person, plus any other info to build rapport |
|---------------------|--------------|--|
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10. What changes should I make for the next primary market research engagement?

Profile changes: _____

Qualitative insights/hypotheses updated (could be more or less than 3):

a. _____

b. _____

c. _____

Quantitative insights/hypotheses updated (optional—only if appropriate and you are far enough along) (could be more or less than 3):

- a. _____

- b. _____

- c. _____

Script update:

- a. _____

- b. _____

- c. _____

- d. _____

II. Headline for this engagement:

