



The link between you and your customer.

At Plan-it Marketing we bring you closer to your customers, connecting you to their emotional needs, to their rational needs. Why? Because we believe in order to truly understand your brand, you must first understand your customer.

their shoes. Live in their world.

● We don't stop there, however.

business and marketing goals.

thinking to solving problems and

provide recommendations and



Get inside their head. Walk in

Simply put, know your customer.

We keep in mind your critical

We apply creative, strategic

identifying opportunities. We

guidance, ultimately leading

you to smarter business decisions. That's what differentiates us from our competition — and that's what

will differentiate you from yours. ● At Plan-it Marketing, we specialize in strategic consulting and

proprietary marketing research services. We've built relationships with more than 100 clients and

advertising agencies. We're Plan-it Marketing. The link between you and your customer.

Case Summaries



JOHN HANCOCK

With more than 10 years of experience partnering with John Hancock, Plan-it professionals designed a unique "in-home" exploratory study that drove the development of the "next generation" brand strategy that became the successor to the "Real Life, Real Answers" campaign. We worked closely with the creative team on the development of the resulting campaign. The new strategy and campaign evolved John Hancock from a respected but entrenched "Insurance Company" to a credible "Insurance & Investment" company. Within six months, attitudes toward John Hancock improved dramatically in critical areas associated with investments (e.g., investment

expertise, service, and flexibility).

Furthermore, the campaign went on to win awards in almost every major creative show in the industry.

From a more tactical perspective, Plan-it assisted in identifying and understanding potential target segments for an inexpensive direct term life insurance product, including Single Mothers and Working Parents. Plan-it's work has also included creative assessment to ensure that the direct campaign triggered an emotional reaction similar to the corporate campaign. Six months after launch of the direct campaign, sales goals were exceeded by 300%.





SWATCH

Plan-it has worked closely with Swatch to evaluate long-term opportunities for the brand in the U.S., including implementation of a comprehensive segmentation study that identified future potential target audiences. Swatch is hoping to achieve the same brand success in the U.S. as it has internationally. Historically, Swatch has been perceived as a "plastic-only" brand in the U.S. Plan-it has helped Swatch to better understand the American watch consumer and develop strategies that focus on the brand's newer line of Irony watches (metal and leather) to appeal to the American appetite.



swatch 



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PRICELINE

Plan-it helped assess the viability of Priceline.com when it was in its concept phase. Priceline.com is the premier "name your own price" service that enables consumers to decide what they'll pay for a range of products and services, including air fares, hotels, automobiles and even groceries. The brand was launched with air fares as the focus and has continued to expand since then.

Our work with Priceline assessed overall interest in the concept and determined the critical features that would make up the ideal service. Priceline was launched nationally in April 1998. Within the first two weeks, Priceline's site received over 10 million hits.

Since its launch, Priceline has become one of the best known online brand names and is one of the most visited sites on the web.

welcome to

priceline.comSM

where you name the price!



Name Your Price for Airline Tickets

DOMESTIC AND INTERNATIONAL



Name Your Price for a Hotel Room

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WILD HARVEST

Plan-it worked continuously with Star Market supermarkets to successfully launch its Wild Harvest brand in the Boston area. Wild Harvest was a new concept that combined an all-natural, organic, and specialty store with conventional everyday grocery products. Plan-it's role was to understand the mindsets of customers and prospects. Our ongoing work aided in making critical marketing and operational decisions. The new concept was extremely successful for Star Market in differentiating the brand and building customer loyalty.





FRESH SAMANTHA

Plan-it worked closely with Fresh Samantha and Warner Public Relations & Marketing to develop a positioning strategy for future communications, determine potential new product flavors, and identify optimal packaging concepts for the all-natural juice brand. Plan-it's role was also to identify opportunities for building long-term relationships with customers and expand the target audience for the brand. New product flavors, packaging, advertising, and promotional strategies were introduced as a result of our work.



I CAN DO ANYTHING

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www.lotus.com/superhumansoftware

LOTUS

Lotus

Plan-it has an ongoing relationship with Lotus Development. The scope of our work ranges from brand positioning to advertising/creative development and brand identity.

Our efforts have continually shaped brand and communications development by

helping Lotus understand the mindsets and motivational drivers of key target audiences, from CEOs/CIOs to web masters to senior level business professionals. In fact, past advertising and brand identity work has led to award-winning advertising and packaging designs.



STRIDE RITE

Plan-it has built an ongoing relationship with the Stride Rite Corporation to help better understand customers/prospects of the company's brands and identify potential marketing and licensing opportunities for the company. Our work has included an exploratory probe of childhood educators' attitudes to identify psychographical trends among children/families and the resulting impact on brand and buying behavior in



the footwear category. Feedback is being used to make long-term planning decisions.

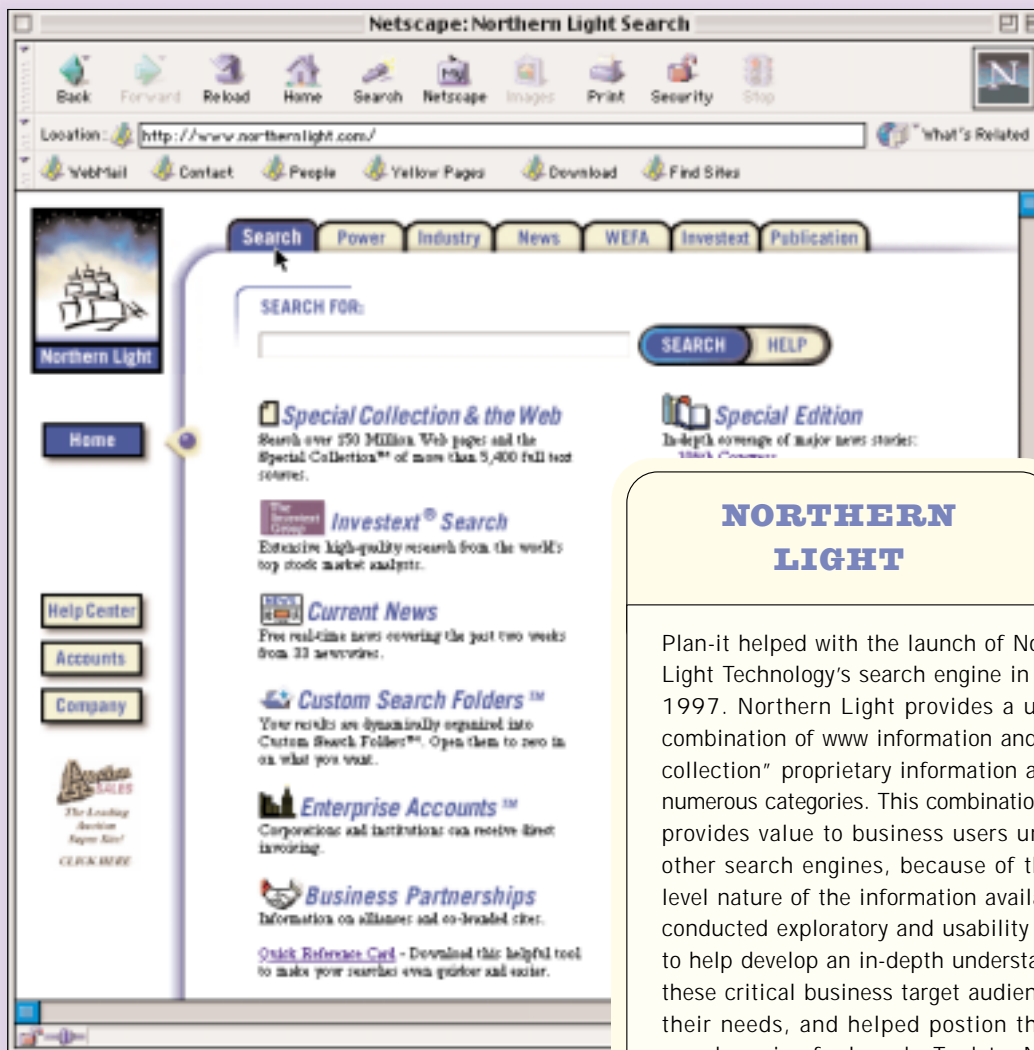


PARTNERS HEALTH CARE

Plan-it Marketing has worked with Partners HealthCare and its major member hospitals, Mass General and Brigham & Women's, on creative development and evaluation of communications materials for Partners' primary care and specialty practices. Plan-it's work began with Partners HealthCare during the merger of MGH and BWH, when Plan-it professionals consulted with physicians, nurses, hospital



staff members and consumers, to determine the effect of the merger and how it should be communicated to everyone involved. Plan-it has also conducted extensive work among the physician audience to determine ways to increase referrals from community hospitals to MGH and BWH. Feedback has resulted in the implementation of continuing education programs for area physicians.



NORTHERN LIGHT

Plan-it helped with the launch of Northern Light Technology's search engine in August 1997. Northern Light provides a unique combination of www information and "special collection" proprietary information across numerous categories. This combination uniquely provides value to business users unlike other search engines, because of the high level nature of the information available. We conducted exploratory and usability research to help develop an in-depth understanding of these critical business target audiences and their needs, and helped position the new search engine for launch. To date, NLT has far exceeded its "new visitor" goals and was ranked as the number one search engine in 1999 based upon the percentage of web information available on one site.

Who we are

Cindy V. Tungate President



AS PRESIDENT OF PLAN-IT MARKETING, CINDY POSSESSES A COMPREHENSIVE UNDERSTANDING OF CLIENT NEEDS IN POSITIONING AND BUILDING BRANDS. HER FIFTEEN YEARS OF EXPERIENCE IN STRATEGIC PLANNING AND RESEARCH IS DIVERSE, INCLUDING TWO NATIONALLY-RENOWNED ADVERTISING AGENCIES AND TWO MAJOR PACKAGED GOODS COMPANIES. AS STRATEGIC PLANNING AND RESEARCH DIRECTOR AT HILL, HOLLIDAY ADVERTISING, CINDY MANAGED A DEPARTMENT OF 10 PROFESSIONALS, OVERSEEING THE AGENCY'S EXISTING AND NEW BUSINESS ACCOUNTS.

Cindy has played an integral role in:

- Monitoring and evolving strategies for the John Hancock brand over time to insure its continual relevance among key target audiences. Her work has been both strategic and tactical, including recommendations for positioning, targeting and segmentation, creative development, product/service development and direct/online selling.
- Assisting new technology/dotcom start-up companies in addressing the needs of key consumer and business segments to effectively launch and establish these brands in the marketplace for long-term success.
- Developing strategies for New Balance to successfully extend its apparel line nationally while leveraging the core values of its sneaker brand. Again, recommendations were both strategic and tactical.

- Working with health and fitness-related companies to help them develop products and services to appeal to health-oriented consumers and to communicate more effectively with them.
- Helping Priceline.com with its initial launch by assessing the overall viability of the service and key features that would motivate users to visit the site.
- Collaborating with professional services organizations on developing positioning strategies, sometimes for an entire industry or profession, and working closely with creatives on the development of resulting advertising campaigns.

Cindy received her MS degree in Advertising from Northwestern University's Medill school and her BA degree in Journalism and English from Michigan State University.

Madeline DeSouza

Principal



AS A PRINCIPAL AT PLAN-IT MARKETING, MADELINE WORKS CLOSELY WITH CLIENTS TO SOLVE CRITICAL MARKETING ISSUES AND HELP BUSINESSES COMPETE MORE EFFECTIVELY. HER MORE THAN 10 YEARS OF EXPERIENCE SPAN CATEGORIES FROM FINANCIAL SERVICES TO HEALTH CARE, RETAIL/FASHION, TELECOMMUNICATIONS, TRAVEL, AND PACKAGED GOODS.

Her work has included:

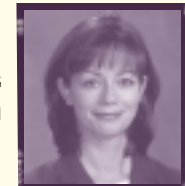
- Developing an in-depth understanding of John Hancock's brand equity in the marketplace and how that equity can most effectively be leveraged in communications.
- Evaluating the impact of the 1999 Olympic Committee Bribery allegations on consumer attitudes toward Olympic sponsors for John Hancock.
- Assessing the viability of new products for Polartec/ Malden Mills, as well as naming new products.
- Developing a brand positioning for Babson College, to be utilized as a communications platform across all targets.

- Developing an in-depth understanding of the mindset of mothers in purchasing footwear for their young children, as well as evaluating alternative new clothing and footwear product introductions for Stride Rite.
- Working with several telecommunications clients to help guide the creative development process, track communications effectiveness, and assess the viability of new products.

Madeline received her MBA from Babson's Olin School. She received her BS in Marketing and Spanish from Stonehill College.

Mary Kelley

Principal



AS A PRINCIPAL OF THE COMPANY, MARY HAS PLAYED A KEY ROLE IN BUILDING THE FIRM'S EXPERTISE IN THE TECHNOLOGY CATEGORY. HER EXPERIENCE IN POSITIONING AND BUILDING BRANDS ALSO SPANS RETAIL, FASHION, SPORTS, HEALTHCARE AND CULTURAL/EDUCATIONAL CATEGORIES.

Some of Mary's accomplishments include:

- Working with Lotus Development on the launch of the "Superhuman Software" advertising campaign, a ground-breaking global branding effort that introduced Notes Release 5 and Domino.
- Assisting Furniture.com with communications strategies, creative development and web site design in preparation for launch.
- Helping Northern Light Technology launch its search engine in 1997; Mary developed a positioning strategy and made recommendations for target audience opportunities and site revisions based upon exploratory and usability research conducted.

- Working with Swatch to extend its watch brand in the U.S. to achieve the same success that the brand has internationally; specifically, helping understand the American watch consumer's mindset to develop strategies that focus on the brand's newer line of Irony watches.
- Helping Emerson Hospital position the hospital for future success in an increasingly competitive provider environment. Mary helped better understand patient/prospect attitudes and developed strategies for attracting and retaining users.

Mary received her BA degree in Psychology from the University of Hartford with a concentration in Marketing and Management.

What we do

At Plan-it Marketing, we provide a broad range and depth of marketing intelligence to companies all over the globe. We strongly believe in taking a customized approach. That's why we treat every client's business needs uniquely and creatively. We can help your company with any of the following:

Brand/Positioning Development

Exploratory evaluation of market trends and building/identifying brand personality/core values

Identifying long-term market opportunities

Communications Development

Communications assessment & effectiveness

Measurement of Communications

Pre & Post brand/advertising evaluation

Market Assessment via Awareness & Attitude Tracking

Target Segmentation To Identify & Profile Opportunity Segments

Web Site Development, Evaluation and Usability

Product/Service Development

Viability of new products/services

Sales forecasting of new product concepts/line extensions

Name screening and assessment

Evaluation of alternative packaging/label designs

Product claims tests for potential use in communications

Taste testing

Audits of client and competitive distribution locations

Price sensitivity testing

Customer Retention/Loyalty

Customer Satisfaction/Employee Satisfaction

Problem Identification/Evaluation of a Negative Trend

How we get there

Plan-it Marketing utilizes a wide variety of techniques for each particular project. These techniques are dependent upon the marketing objectives of each specific company, and include:

- Anthropological (observational)
- Focus Groups (including dyads, triads and mini-focus groups)
- One-on-one in-depth interviews
- Telephone interviews
- In-home/in-office interviews
- Mall-intercepts
- Mail surveys
- Web site navigation
- On-line surveys/focus groups
- Store checks/observations
- Secondary evaluation (database generated) of economic, political and cultural trends

Our breadth and depth of experience

The expertise that members of the management team bring to the company is unique in its breadth. Plan-it professionals have specialization across a number of industries, including:

- Alcohol/beverages
- Automotive
- Financial Services
- Health Care
- Packaged Goods
- Professional Services
- Retail/Fashion
- Sports
- Technology & Communications
- Travel

Our experience also encompasses planning and research across a variety of communications vehicles, including:

- Design/Collateral and Brand Identification
- Direct marketing
- Exhibition Services
- General advertising
- Interactive/Internet communications
- Packaging
- Public Relations

Our Clients

AUTOMOTIVE

AutoNation, USA
Ford Dealerships of
New England & Pittsburgh
Gulf Oil
Honda New England

FINANCIAL SERVICES

American Express
Fleet Financial Group
Fidelity Investments, Inc.
John Hancock Financial Services
Webster Bank

HEALTH CARE

Bayer
Brigham & Women's Hospital
Emerson Hospital
Harvard Pilgrim Health Care
Humana Inc.
Massachusetts General Hospital
Partners HealthCare
Pri-Med

INFORMATION TECHNOLOGY/ INTERACTIVE

Advanced Micro Devices (AMD)
Cozone.com/CompUSA
Furniture.com
Priceline.com
Monster.com
Digital Equipment Corporation
Lotus Development Corporation
Northern Light Technology, LLC
Stratus
Wang

NEWS ORGANIZATIONS

The Boston Globe
Community Newspaper
Corporation/Fidelity Capital
Dow Jones Company/
Wall Street Journal

PACKAGED GOODS

Gillette
Lindt Chocolate
Perdue Farms
Slim Fast
Tambrands

PROFESSIONAL SERVICES/ ASSOCIATIONS

AICPA
California Society of CPAs
PriceWaterhouseCoopers
National Association of Realtors
NewSub Services
Sheshunoff Mgmt. Consulting
Wallpaper Council

RETAIL/FASHION

Hart Schaffner Marx
J. Baker/Work'n Gear
Kay Bee Toys
London Fog
Malden Mills/Polartec
Marshalls
Nautica
Sperry Top-Sider
Star Market/Wild Harvest
Stride Rite
Swatch
Swiss Army
Tommy Hilfiger

RETAIL/ALCOHOL/BEVERAGES

Fresh Samantha
Labatt USA/Rolling Rock Beer
Dos Equis Beer
Veryfine

SPORTS/RECREATION

Boston Celtics
Converse
Killington Ltd./Mount Snow
MacNeill Engineering
Massachusetts State Lottery
Reebok/Greg Norman Sportswear
Spalding Sports Worldwide/
Top-Flite

TELECOMMUNICATIONS/ ELECTRONICS

Bell Atlantic Yellow Pages
Cablevision Systems Inc.
CellularOne
Omnipoint
SNET/Southern New England
Telephone

TRAVEL

American Express
Travel-Related Services
Budget Rent A Car
Doral Hotels
EF Educational Tours
Hyatt Hotels
Priceline.com

PRO-BONO

CULTURAL/EDUCATIONAL

Advertising Club
of Greater Boston
Babson College
Boston Ballet
Boston College
Boston Symphony
Children's Museum
Mass Convention Center
Museum of Fine Arts

ADVERTISING/INTERACTIVE AGENCIES

Arnold/Circle Interactive
CGN Marketing
DonovanGroup
Greenberg Seronick
O'Leary and Partners
Grey Advertising
Hill/Holliday
Hill/Holliday Interactive
Holland Mark Edmund Ingalls
Pace Communications
Pagano Schenck & Kay
Partners & Simons, Inc.
Rubin Postaer
TFA/Leo Burnett Technology
Toth Brand Imaging
Warner Communications