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THE LINK BETWEEN YOU AND YOUR CUSTOMER

Do your homework. Business leaders know that is the first maxim of marketing. Of course, developing insightful research and turning it into action is a homework task that is often easier said than done.

Enter PLAN-It Marketing, Inc., a strategic planning and proprietary market research company with a 13-year track record working with over 100 brands, businesses and advertising agencies. PLAN-It uniquely links the worlds of research and strategic planning.

"For a client, we can provide that critical early stage of understanding just what's important in order to gain a competitive advantage," says Cindy Tungate, president and co-founder.

Tungate started PLAN-It 13 years ago, along with two other women partners; the three had all worked together at a major Boston advertising agency. Tungate had an extensive background in the marketing world, with experience at both nationally known ad agencies and at major packaged goods companies. She and her partners envisioned a strategic planning firm that combined the best marketing skill sets. PLAN-It would design and implement qualitative and quantitative research, and use it to craft creative planning for new brands, services and products.



Cindy Tungate
 President and Co-founder



Madeline DeSouza
 Co-founder

"There are lots of firms that can execute research and many marketing consultants who are involved in planning but lack expertise in research. We combine those two disciplines," she says. "We play a strategic consulting role with our clients, providing a solid understanding of the research and knowledge of the best strategies for building brands."

Helping Clients Make Intelligent Business Decisions

PLAN-It works with businesses, consultants and ad agencies on a number of levels. It works best as a long-term strategic partner, as some of its success stories indicate:

- In a nearly 20-year relationship with John Hancock, PLAN-It's work encompassed a breadth of proprietary projects among consumer and business audiences, including positioning and communications work, product development, an assessment of the value of Olympic sponsorship and an annual economic monitor. It also played an instrumental role in John Hancock's merger with Manulife; as part of the advisory team, PLAN-It was tasked with placing a marketplace "value" on the brand and then evaluating the marketing challenges of merging brands in Canada and the U.S.
- PLAN-It worked with Beth Israel Deaconess Medical Center to evaluate the impact of its referral outreach initiative among general practitioners. A two-phased study guided recommendations related to building familiarity with specialties and physicians, improving efficiencies in administrative procedures and distributing communications materials to the community.
- PLAN-It partnered with Innocentive to build an online community for scientists globally, providing major companies with the opportunity to post scientific challenges for the world's leading minds to solve.
- PLAN-It has a long history as a preferred strategy and research partner to Bank of America, Merrill Lynch and Fidelity. A key role has been to support customer relationship building and identify opportunities for retention and growth.

Tungate says the firm prides itself on providing objective, independent insight and strategy so that clients can make the smartest business and marketing decisions. "We tell the client what we really think, not what they want to hear," she says. "That doesn't help a client and it hurts our credibility."

Ultimately, it's about doing the homework clients need to be "market intelligent." As Tungate puts it, "Is there a problem to solve? An opportunity to realize? What are consumers looking for? What are their unmet needs? What is a viable target audience for a brand? How do we tap into that on an emotional level? The bottom line is, we produce actionable work."

PLAN-It Marketing has worked with over 100 clients representing diverse industries. They include:

FINANCIAL SERVICES

Bank of America
 Fidelity Investments
 John Hancock
 Merrill Lynch
 Putnam
 UBS
 Scottrade

EDUCATION

Boston University
 Boston College
 Babson
 Emerson

FOOD / BEVERAGES

Stop & Shop/Giant
 Dunkin' Donuts
 Red Bull

HEALTH CARE

Arthritis Foundation
 Bayer
 Beth Israel Deaconess
 Emerson Hospital
 Harvard Pilgrim Health Care
 Massachusetts General Hospital
 Partners HealthCare

NEWS ORGANIZATIONS

Community Newspapers
 The Boston Globe
 The Wall Street Journal

PACKAGED GOODS

Gillette
 Perdue Farms
 Slim-Fast

RETAIL / FASHION

G.H. Bass & Co.
 Hart Schaffner Marx
 Hasbro
 Lee Jeans
 London Fog
 Nautica
 Net-a-porter
 Samsonite
 Swatch
 Swiss Army
 Tommy Hilfiger
 Wrangler

TECHNOLOGY / WEB

Comcast
 Priceline