

CRR Marketing Plan:

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Introduction

I have been given permission to use this marketing plan in order to show case my work.

I developed and wrote this marketing plan for Court Record Research, Inc. during the summer of 2006 while I was their marketing intern. This exercise involved defining the mission, positioning, and value propositions as well as creating various strategies along with the company's message, etc.... During this process I analyzed the market, the company, competition and clients to uncover opportunities for improvement. Appropriate recommendations, based on strategic and tactical objectives were made and included in the plan.

The Financials Section as well as some other charts, tables and accompanying text have been omitted. Some sentences been omitted or replaced with X's.

**As of October 24, 2006 many recommendations and elements of the plan have not been implemented....

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1. Executive Summary

Our Company is ripe for expansion and our ultimate goal is to optimize our position for the future.

This marketing plan is designed to give us a blueprint for increasing volume and our customer base while we diversify our revenue streams and leverage our core strengths. We have included a complete situational analysis (identifying our strengths, weaknesses, opportunities, and threats), a marketing strategy and the marketing mix, along with detailed milestone tables, and other relevant discussions.

The marketing objectives for our marketing plan are:

- To remind customers and prospects about the benefits of doing business with CRR.
- To create awareness of our services to sell more to existing clients.
- To encourage referrals from existing clients.
- To retain existing clients.
- To attract new customers and replace lost ones.
- To maintain steady, sustainable growth.

We hope this marketing plan creates a long-term growth model for our continuing success.

2. Situation Analysis

Court Record Research, Inc. offers expertise in public document retrieval, search & recording services, process services, and medical records retrieval to law firms, attorneys, title plants and escrow officers. We have a solid and loyal customer base in the escrow/examination support services market and this segment accounts for most of our revenues. This presents a long-term threat to the company due to changes within that market. Consequently, we have introduced a number of new services over the years to increase our revenue base in order to provide new growth and future stability.

Our services have been well received. This year we intend to take on more litigation support work. Specifically, we intend to cross-pollinate existing clients, encourage referrals and pursue a select number of prospective clients. In addition, we intend to grow the escrow/examination support area as much as possible.

We believe that a comprehensive marketing strategy will be the key to creating awareness of our growing service offering and will help encourage referrals, etc...

2.1. Market Needs

Attorneys have a need for swift and accurate public document retrieval, search services, process services and recording services. Moreover, we perceive the need for a "one-stop" shop among attorneys who represent plaintiffs. For this reason we have launched a process service department. We have also created and are refining our medical records retrieval division, setting the foundation for cross-pollination of existing attorney clients.

Title plants and escrow offices have a need for quick and accurate public document retrieval as well as search and recording services.

CRR provides tangible and intangible value. We know our client's time and administrative resources are best used elsewhere. Our objective is to reduce their administrative efforts and overall cost by providing reasonably priced services that are easy to use.

Delivering results that are quick, accurate and reliable creates value by saving clients time, effort and money. The results give our customers a competitive advantage. Inevitably, they become more confident and successful with the work they perform. Often times, this value enhances their reputations while minimizing their issues and liabilities. If things go wrong, they have experts to blame. If things go right, they get the credit.

2.2. The Market

Our clients value their time and resources, and seek to minimize their administrative efforts while staying on schedule. They do not like negative surprises. They realize and appreciate the value in the services we offer, along with the lost opportunity costs of not benefiting from our services.

2.2.1. Market Trends

We stand to benefit from specific market trends:

- Population increase: Houston, the fastest growing U.S. city of the 20th century, currently ranks fourth on the nation's list of the most populous cities, with 2 million city residents and 4.5 million people in the metropolitan area. And, Harris County is the 3rd largest in the nation.
- Contributing to the city's growth has been its affordable housing and low cost of doing business.
- Foreclosures are on the rise in the Houston area.
- Personal injury litigations (and litigations in general) are on the rise: statewide and nationwide.
- Houston ranks second in the country in Fortune 500 headquarters and is home to the world's largest medical center.
- The U.S. health care industry had the greatest number of pending litigation matters.

2.2.2. Market Growth

The Houston area continues to grow and so does the need for housing and lawsuits.

CRR's public document retrieval, search and recording services are a subset of the real estate industry (escrow and title plant) and our normal market growth increases should match the previous few years based on the following data:

Houston created 42,500 new jobs in 2005 and there are predictions of 30,000 - 70,000 new jobs for the city in 2006. For 17 straight years, housing starts in Houston have gone up from the previous year. And, appreciation rates remain at a reasonable 5% annually, which keeps the Houston area affordable. Plus, many Hurricane Katrina victims are relocating to the area, helping to boost multifamily occupancy rates and single-family starts.

The National Association of Realtors predicts that this year the housing market will stay strong, with the second-highest number of sales on record. NAR also issued a forecast for 2006, saying that the housing market will "normalize" this year. Home builder Randy Bayer, president of the Greater Houston Builders Association indicated that Houston continues to be a strong market for home builders due to a resurgent energy sector, moderate home appreciation rates and a growing population. Also, the Houston Association of Realtors Multiple Listing Service reports that Houston residential real estate remains a seller's market with continuing steady strength. In addition, immigration usually results in higher population and employment growth, both of which have been shown to raise housing demand and housing prices.

Housing demand has been strong across all price ranges, even in the highest-priced segments, according to Mike Inselmann, president of Houston-based real estate research firm Metrostudy. He goes on to say that the only cloud on the horizon is the effect mortgage rate adjustments will have on homeowners. He believes foreclosures will continue to rise because of loose mortgage-qualifying factors over the last few years.

Annual real estate sales have seen 4 - 5% increases per year since 2003 and there is no indication this will not continue as it is jobs and demographics, not interest rates, which will be the driving forces of the Houston market.

CRR's process service and medical retrieval divisions are a subset of the litigation industry. We see growth in this industry as well. We would like to take advantage of this and grow our divisions by acquiring more market share.

As the population increases, personal injury litigations are said to be on the rise. Personal injury litigation includes but is not limited to: personal watercraft civil litigation, automobile wreck litigation, mold litigation, medical malpractice, nursing malpractice, nursing home abuse, wrongful death, automobile and motorcycle collisions, etc.

There are also cases involving "products liability". That is to say, cases involving products which may be defective as a result of a "design" problem or a "manufacturing" problem. Over the last decade, the average number of product liability claims closed per year was 134,209, or about 2,700 per state.

There has been an enormous increase in personal injury from pharmaceutical products in what is referred to as the "pill" docket.

Unfortunately, personal injury cases are on the rise because the fast paced life of the 21st century can cause more devastating, permanent types of injuries than at any point in human history and population growth fuels this fire.

2.3. The Company

Court Record Research, Inc. is a profit sharing company that is going to increase revenues by marketing the full range of our services to increase awareness and referrals from our targeted market segments.

Angela Clark, Debbie Martens and Andrew Espinosa will be primarily responsible for the marketing activities. This is in addition to their other responsibilities, and they will depend on some outside resources for graphic design work and idea generation. Angela will delegate marketing responsibilities to the other staff members as everyone in the company has a role to play. Marketing interns from the University of Houston should be utilized from time to time. This will bring CRR additional resources and helps the student gain real world experience.

2.3.1. Mission

Court Records Research, Inc. is to be a more profitable company that provides a successful and enjoyable environment for its employees.

Our service goal is for clients to save time and effort while becoming more assured and successful with the work they perform by using our quick, accurate and reliable services. These results should give our customers a competitive advantage that enhances their reputations within their firms and with their clients. Our goal is that our services are easy to use and reasonably priced.

2.3.2. Service Offering

Litigation and Corporate support services

Process services:

We are accountable, consistent and responsive with service of papers to individuals and business entities. Our clients' satisfaction is our highest priority which motivates us to pay special attention to strict deadlines and special arrangements they may require. We thrive on getting service of process affected quickly and cost effectively. By saving clients valuable time, CRR's expertise and determination helps reduce their administrative efforts, thereby allowing them to focus on their specific business goals.

They will benefit because of the following features:

- On-staff as well as an established, proven network of certified process servers and agents.
- Available to serve and retrieve from anywhere in the country and internationally.
- Can handle large volumes of paper.
- Will assist with document preparation (citation, notice, supine, etc...) using the most current forms required by law and you can review your completed item via e-mail.

- Rate includes three attempts per paper, filing of executed and unexecuted returns with the appropriate courts, returns via electronic form and regular mail (or by any other means requested).
- Personally accessible Monday - Friday 7am - 6pm.
- Electronic results as well as web based orders are conveniently available 24/7.
- Reasonably priced and we don't up-charge on pass through services (copies, notary, etc...).

They will find value in our new state-of-the-art web-based program:

- Easily place request electronically 24/7.
- Request acknowledged immediately.
- Conveniently fill out contact information only once.
- All forms retain pertinent information for future order.
- Our system recognizes clients by e-mail after the first order is complete.
- Copy of orders automatically e-mailed back to client for review.
- Free electronic, password coded "workspace" where their delivered documents are located.
- Updates are e-mailed and/or posted to a private workspace for their convenience.
- The workspace we set up for eliminates the need to keep separate records of their own and is available 24/7 to check deliveries or e-note status reports.
- Ability to forward items from workspace to other parties.
- Easily download items from assigned workspace to any computer.

Public document retrieval:

Obtaining copies of pertinent legal documents can be tough and time consuming due to the high volume and public demand placed on government entities.

The results we bring clients are quick, accurate and more reliable because we are familiar with the documents and know the ins and outs of various government entities through 20+ years of valuable experience. We know who to talk to and who to follow-up with in order to make things happen.

Whether they need one item, have on-going retrieval needs or have a multi-state, multi-jurisdictional search and retrieval project, we are here to serve them with the wide-ranging strength of our experience and know-how.

We can access a wide range of records from various areas and are familiar with the different types of copies available.

More than that, it's easy and convenient to benefit from CRR's services. Go no further than the desktop:

- Easily place request electronically 24 hours a day, seven days a week.
- Exact request is immediately e-mailed to client for review and confirmation.

- Updates and order status posted for review and response with our e-note system.
- Records and documents delivered via our electronic delivery system.
- Our electronic delivery system:
 - Provides clients with a private, password coded "workspace"
 - Links and password for their workspace sent and provided with each e-mail.
 - Access to products 24 hours a day, seven days a week.
 - Documents in the workspace can be saved to any computer
 - Ability to forward documents from the workspace.

When the desktop just won't do:

- Phone service available Monday - Friday, 7am -6pm.
- Physical delivery of records and document available.
- Certified copies: delivered via overnight service or regular mail.

As a document solutions partner we will work with clients to determine the most efficient and cost effective ways to satisfy their needs.

Search services:

We are a one-stop-source for search and recording services.

We know the client's time and administrative resources are best used elsewhere and all search requests can be performed according to their specific needs. They will be satisfied with the success our accurate and dependable results will bring to their team.

They will benefit from faster processing times because of our experience, creativity and skills to effectively manipulate the data contained within the vast multitude of non-conforming databases located throughout the country. And, we are familiar with the various jurisdictional systems as well.

We have proven ourselves through 20+ years of successfully completing various types of local and nationwide searches. Clients can trust us with searches involving: litigation, UCC, probate, marriage license, assumed names, corporate entities, and real estate as well as various other miscellaneous records. When the situation demands, we can perform hands on research in every county/parish whether it involves simple individual or statewide searches.

Not only can we search the secretary of state database for corporate document needs, we can also assist with new corporate entity filings.

Recording services:

We won't let our clients item get returned or put on hold due to an incorrect fee or an unsatisfied regional requirement; this wastes time, effort and money.

Our clients can avoid the frustration and stress of recording service delays by utilizing CRR's experienced professional network which is familiar with the proper procedures of more than 3,000 different county clerk entities nationwide.

Their document can be hand delivered for proper filing anywhere in the nation. Normally, their document can be forwarded for filing the day after we receive it.

Medical records retrieval:

We want to help clients reduce their administrative efforts and overall cost by providing medical record retrieval services that are quick, accurate and reliable. Yes, it's true, our goal as a service provider is to save their organization time and money.

They know what a burden medical record retrieval can be, especially when their in-house resources are better utilized in other areas. Even if clients already have a source for medical records retrieval, they may lose confidence in them because their vendor arbitrarily changes their prices or they error when ordering from the source, delaying the request.

The customer's solution is to benefit from CRR's determination to provide results that satisfy their expectations. In the process, they will gain confidence as their team becomes more successful.

We make it easy for clients to submit request right from their desktop or by phone. We will obtain their requested documents, scan and send them electronically. Then we will follow up by sending them a hard copy.

E-recording service:

People Finder:

Clients want accurate results the first time. Our solution: after searching various sources available to us in an attempt to determine the current address and phone number of the subject in question, we will confirm our results before presenting the information (unless instructed otherwise).

Employment screenings:

Many prospective employees misrepresent their accomplishments, background and why they left a former employer. In addition, theft of company resources by employees is a growing problem that causes business to fail.

Clients want honest employees and employment screening is an important part of due diligence that can lead to:

- More realistic evaluation.
- Reduced employee turnover cost.
- Increased productivity.
- Less absenteeism.
- Less risk of employee theft, fraud and negligence.
- Safer work environment.

CRR provides comprehensive, legally compliant employment screening services featuring fast, accurate and reliable results.

Escrow Officer and Title Plant support services

Public document retrieval:

Same as above with a focus on real property records (Deed, Deed of Trust, Abstract of Judgment, Power of Attorney, affidavit, maps, restrictions, deed records, contract records, mortgage records, tax liens).

Search services-real estate:

Clients can trust us with all types of searches, especially those involving:

- *Bring-to-date* - search to determine if there are items filed of record in order to bring a property search as current as possible.
- *Document locate* - search to determine if a particular item has been filed of record.
- *Last deed* - search to locate the most recent conveyance of a property.
- *Property report* - typically includes current owner, liens.

They will be satisfied with the success our accurate and dependable results will bring to their team.

We know their time and administrative resources are best used elsewhere and all search requests can be performed according to their specific needs.

When the situation demands, we can perform hands on research in every county/parish whether it involves simple individual or statewide searches.

Recording service: Same as in Litigation and Corporate support services

People Finder: Same as in Litigation and Corporate support services

Employment screenings: Same as in Litigation and Corporate support services

2.3.3. Positioning

Our clients understand that our kind of expertise would be very expensive and arduous for their full-time permanent employees to produce. Plus, their internal resources are better utilized on other specialty areas.

We are known, among those who do business with us, to be more accurate, reliable and quick when compared to our competitors. These adjectives (quick, accurate, reliable) are most important to our clients market needs. Each segment is in a "push" industry where speed, accuracy and dependability of service are important.

Our market position will focus on benefits. Customers want to know "what's in it for me". We will communicate what our services can do for them. See the section 3.6 on messaging.

2.3.4. SWOT Summary

The SWOT analysis covers strengths, weaknesses, opportunities, and threats. Strengths and weaknesses are generally internal attributes, which we can address by changing our business. Opportunities and threats are generally external.

Overall, the mix is exciting. We can leverage our strengths to take advantage of the opportunities the market presents. We can develop those areas that are weaknesses, and devise contingency plans to address threats if those should become a reality.

CRR recognizes the following strengths, weaknesses, opportunities, and threats (SWOT):

2.3.4.1. Strengths

1. **Know-how:** 20+ years of valuable experience in document retrieval and process service help us to be quick, accurate and reliable with our services. These skills are highly transferable to the medical record retrieval division. Our business savvy is transferable to all services offered.
2. **Employees:** Excellent and stable staff, offering knowledgeable and friendly service. We are a profit sharing company so our employees have a stake in doing good business.
3. **State of the art web-based program:** Utilizing the latest software that continues to enhance our productivity and expand our capacity. Allows customers to easily place request and retrieve delivered documents online 24/7.
4. **Hours of business:** We are open earlier and close later than our competition. Our internet site provides information and certain other features 24/7.
5. **Location:** Our main offices are located downtown and we are one of only two companies allowed space in the privileged area within the courthouse.
6. **Contacts:** Years of industry experience and exposure generates much word-of-mouth marketing, contacts, and networking.
7. **Longevity:** High client retention, providing good referrals throughout the years.

2.3.4.2. Weaknesses

1. **Marketing:** Lack of consistent marketing and a specific plan. We depend on word of mouth first as our main form of generating leads: While this is a good thing, we want to encourage more referrals and bring awareness to unused services through marketing efforts.
2. **Staff:** Some members of the staff do not have an understanding of, or a commitment to, tracking the marketing activities. Inconsistent follow-up and follow through with clients, especially first time users. Problem could be due to weakness #3.
3. **Lack of training manuals:**
4. **Need to diversify:** While great strides have been made to expand beyond the title industry, there remains an unbalanced ratio of title business vs. alternative clients. Also, all of the medical business is currently from one firm.
5. **Name of company:** While not a problem now, it could be a problem if we diversify too far from the public records retrieval industry.
6. **Diverse product base:** makes it easy to dilute focus, minimizing momentum and possibly profits.

2.3.4.3. Opportunities

1. **Market Growth:** Benefiting from the ongoing increase in population.
2. **Service Expansion:** E-filing, background and employment screening services. Special clients are enabling and providing us an opportunity to strategically expand the services we offer (medical records retrieval, etc...). As we gain expertise and establish our reputation in these areas, we will market those to other clients and use them as a point of interest to attract new clients.
3. **Marketing:** We have continuing opportunities through referrals and marketing activities. Our process service is in adolescence and our medical record retrieval has been recently launched. A significant percentage of our existing clients are not aware of our full service offering. And, many firms have not been exposed to us at all.
4. **Internet potential:** for selling and marketing services on a nationwide basis.

2.3.4.4. Threats

1. **Continued sophistication of technology:** Databases are being created that will enable companies to search public records from their desktops. Certified copies are becoming available electronically by more entities / sources. Electronic process services may soon be available for company to company service. Currently, it is still more hassle than it is worth as the databases are not user friendly. In 3-5 years it will likely be a concern.
2. **Privacy legislation:** Could affect the quality of product.
3. **Increased competition:** This could come from sole practitioners and new firms with greater financing coupled with an aggressive pricing strategy.
4. **Elections:** Change of County Clerk can impact our ability to access items.

2.4. Competition

A number of companies offer services similar to ours but most do not offer the range of services that we do. Comparatively, we are more of a one-stop-shop. Regularly, our competitors will come to us for service.

As we control 80% of the escrow officer and title plant support service market, we consider ourselves the unequivocal benchmark of quality service. Only one of our competitors has access to XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX, and we have set the mark for the competition to follow. Clients choose us over the competition because we are consistently responsive, more accurate and more professional.

The competition is strong in the litigation support service market. The competitors we have focused on are: XXXXXXXXXXXXXXXXXXXXXXXX. While examining the competitor's available literature, we have found a common under utilization of a basic marketing rule: Promote the benefits. Most competitors seem to highlight the features of their service while burying the benefits. By studying the competition we have recognized we are guilty of the same fault. We are refocusing our literature (website) to highlight the benefits using the features as support. We will continue to monitor and learn from our competition.

Online databases are competition too. But, there are still plenty of reasons for clients to outsource their needs:

- Time efficiency.
- Cost of diverting their in-house resources to learn how to navigate the various databases and the time they spend at various clerk's offices.
- The concern of accuracy.
- Relationships: live people to talk to if problems arise.
- Disinterested third party search.
- Liability of search.

3. Marketing Strategy

Part of our overall strategy involves focusing on and developing our areas of expertise.

Our marketing strategies are based on meeting the needs of existing and future clients. We will do this through leveraging internal and external business strengths and understanding the competitive environment. The marketing strategy attempts to successfully communicate the value our services offer. This strategy redirects the focus from the "cost" issue to the benefits that clients gain from using our services. All marketing strategies work toward supporting our mission statement and realizing our stated goals.

Our marketing strategies fall into six categories:

1. Encourage and reward referrals.
2. Build awareness of services (cross-pollinate).
3. Retain existing clients.
4. Attract new customers and sales.
5. Marketing awareness training.

The strategy will use several different methods to achieve these goals.

3.1. Value Proposition

Our value proposition is dependable, valuable expertise and know-how that enables us to quickly deliver precise results. We create value by saving clients time, effort and money. This allows their internal resources to focus on other business goals and gives them a competitive advantage. We are not going to compete on price; we compete on quality that makes the price more than worth it.

3.2. Critical Issues

Our strengths are significant. Our weaknesses are identified and have potential solutions. We are presented with several opportunities and also have threats that could materialize in the future. If we can successfully cross-pollinate existing clients while increasing referrals we can build a solid foundation for expanding market share (litigation support services) in a significant way. In addition, building awareness of our services to potential clients can only improve from here.

CRR's escrow/examination support service could be described as mature. The critical issues include the following:

- Continuing to offer services that are perceived as quick, accurate and reliable compared to the alternatives.
- Marketing programs must be cost efficient and backed by solid data gathering and a high potential for success accomplished by tracking results to better understand which marketing activities offer the best return.
- Expanding our core group of satisfied clients who come back to us on a regular basis.

- Diversifying the business beyond this industry to meet future threats.

Our litigation and corporate support services could be described as ideal. The critical issues include the following:

- Pursue controlled growth that dictates that payroll expenses will never exceed sales revenue.
- Expanding our core group of satisfied clients who come back to us on a regular basis.
- Ensuring that our growth strategy will not compromise the perception that our services are quick, accurate and reliable (compared to the alternatives).
- Marketing programs must be cost efficient and backed by solid data gathering and a high potential for success accomplished by tracking results to better understand which marketing activities offer the best return.

3.3. Financial Objectives

XXXXXXXXXXXXXXXXXXXXXXXXXXXX.

3.4. Marketing Objectives

Recently we have diversified our service offerings to insulate the business against fluctuations or declines in any one component of the revenue stream. At this point our overall goal is to steadily increase market share and sales to boost the bottom line. Market share is difficult to measure and track as are other components of the marketing. We will track sales revenues and new customer acquisitions to measure our marketing efforts.

Objectives:

- To remind customers and prospects about the benefits of doing business with CRR.
- To create awareness of our services to sell more to existing clients.
- To encourage referrals from existing clients.
- To retain existing clients.
- To attract new customers and replace lost ones.
- To maintain steady, sustainable growth.

3.5. Target Market Strategy

We have divided our market into two segments:

Attorneys and their firms who need litigation support services

Title plants that need escrow/examination support services

3.6. Messaging

We do have a strong message to present. Our competitive advantage is our "know-how" that enables us to be more quick, accurate and reliable than the competition. The benefit this provides should become the platform of the marketing campaign. The benefit is clear, our clients:

"Save time and effort while becoming more assured and successful with the work they perform by using our quick, accurate and reliable services. These results should give our customers a competitive advantage that enhances their reputations within their firms and with their clients"

This message is reinforced, in various ways throughout the new text/copy which has been presented as an update for the web-site. Among other things, the web-site does function as an informational brochure. Our marketing collateral should **sell the benefits** using features only to back up the benefits.

We are not the most inexpensive, but we are professionals who are worth what we charge.

To make sure our messaging will reflect professionalism, we need to print marketing material with high quality graphics on high quality paper. Our website must be clean, functional and aesthetically pleasing. It will be important to spend a little bit extra, if need be, on the marketing materials and web-site to ensure that they have a professional, quality look and feel.

<i>Target Market Messaging</i>	
Market Segments	Messaging
Litigation support services	Save time and effort with our quick, accurate and reliable services.
Escrow and title plant support services	Save time and effort with our quick, accurate and reliable services.
	-

3.6.1. Branding

With our business, branding is a slow process of word of mouth and repeat business.

We would like to brand ourselves as professionals who deliver quick, accurate and reliable results at reasonable prices. Currently, we have a logo and name which brands us as a company that does court record research - although we do much more. At this time, there are no plans to change the name for more effective branding because it might not be necessary. It is suggested that our marketing materials reflect a brand message: CRR--- quick, accurate and reliable.

All of our marketing materials (including the website, invoices, letterheads, etc..) should be integrated with the same look and feel.

4. Marketing Mix

CRR's marketing efforts will focus on expanding sales through cross-pollination and growing our loyal base of clients through new client acquisition. We are pushing for image and awareness.

Experience has proven that the most significant factor in acquiring new clients is a direct result of referrals. Client retention is essential and receiving referrals from them can make us more successful. People ask other people they know, trust, and share a similar financial position to tell them what company they use for such and such service. It is as simple as that. Our marketing mix will consistently work to optimize the volume and quality of those referrals.

Our marketing mix relies heavily on our direct marketing promotions. Our price structure is flexible. We do not compete on price.

4.1. Service Marketing

We need to consistently deliver the results of our service quickly and accurately to provide our clients with unwavering confidence that they will receive their tangible and intangible benefits.

4.2. Pricing

Our pricing strategy can be based on, but not limited to, competitive parity guidelines. However, our pricing strategy fluctuates and recently has been consistent with the differentiation objective, to provide added value for a reasonable rate as opposed to discounting and de-valuing our services. That said, we will not hesitate to exceed competitors' prices and are not afraid of premium pricing for premium services. Overall, we will strive to maintain reasonably priced services while giving promotional discounts when possible.

Sometimes we use a penetration pricing strategy. XXXXXXXXXXXX XXXX XXXXXXXX XX
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XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX.

Our price strategy to gain referrals and to cross-pollinate: We will buy a market position (coupons/discounts/rewards):

- Discounts or some type of reward to customers who offer us a business benefit (referral).
- Introductory discount for new clients (referred or promoted to).
- Offer discounts to customers who pay promptly.

We must be able to control this reward process. No guidelines or concrete actions have been taken for this idea yet.

4.3. Promotion

Our promotional strategy in the past has been through grass-roots networking, word of mouth and advertising in the Texas Legal Directory.

We seek to enhance our promotional strategy by focusing heavily on direct marketing:

- We seek to leverage referrals from professional contacts and individual clients to make this an integral part of how we conduct business. As usual, grass-roots networking for referrals and leads will be nurtured through social outings. Direct mail and invoice supplements (along with incentives) will also be used to encourage referrals.
- Direct marketing along with our sales process will be used to create awareness of our range of services to cross-pollinate existing client and to bring in new customers.
- And, other techniques will be considered as they present themselves.

We have the expectation that all employees will take on the task of tracking the marketing efforts of the company and provide market research as opportunities arise. We should track, give feedback, and acknowledge efforts, accomplishments, and results from these actions.

Our promotional strategy will use the benefit approach.

4.3.1. Advertising

In the past, advertising was not a big part of our marketing mix. Instead we had a steady supply of referral business as a result of our focus on service.

We have advertised in the Texas Legal Directory to target the litigation segment. This "yellow page" type of advertising, if used, should have a headline that says what makes us special followed by:

- Reliability (# of years)
- Services
- Business hours
- Special features

Research suggests using color increases effectiveness of "yellow page" type ads.

Because we have a more diverse product line it may be wise to revisit "yellow page" type ads. Also, there are more avenues available on the web that may effectively expose us to specific markets. If used, we must track sales leads to determine if this type of advertising is bringing in more business than it cost.

Advertising via marketing materials (including the web-site) should follow the benefit approach. The benefit is the advantage the customer receives after using our service. Promote the benefits, features are cited only to make the promised benefit believable.

What advertising can do:

- Remind customers and prospects about the benefits of the service.
- Establish and maintain our distinct identity.
- Enhanced reputation.
- encourage existing customers to refer:
 - Build sales through customer referrals.
 - Repeat purchases of existing clientele.
- Attract new customers and replaced lost ones.
- Slowly build sales to boost bottom line.
- Promote business to customers.

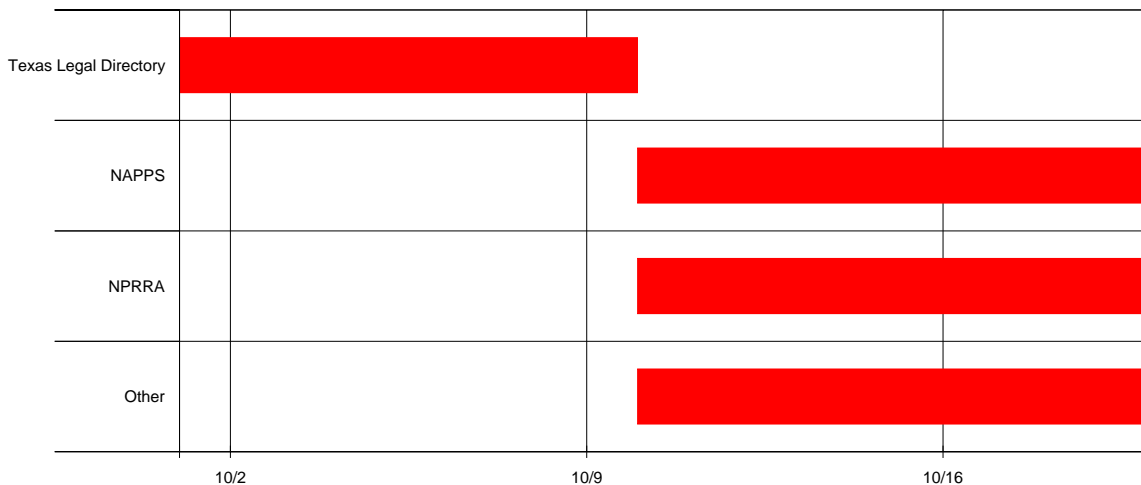
It takes time and persistence. The effectiveness of advertising improves gradually over time. We must repeatedly remind prospects and customers about the benefits of doing business with CRR. **The long-term effort triggers recognition and helps special offers or direct marketing payoff.**

Avoid these pitfalls:

- The greatest obstacle to good advertising is excess (limit clutter, you need white space too).
- Avoid any claim that could be construed as deceptive.
- Emphasized the solutions you provide, not the problems you address.

Advertising Milestones Table					
Advertising	Start Date	End Date	Budget	Manager	Department
Texas Legal Directory	10/1/2006	10/10/2006	\$0		
NAPPS	10/10/2006	10/20/2006	\$0		
NPRRA	10/10/2006	10/20/2006	\$0		
Other	10/10/2006	10/20/2006	\$0		
Total Advertising Budget			\$0		

Advertising Milestones Chart:



4.3.2. Direct Marketing

We will send out direct marketing mainly to current clients, which will consist of thank you notes, referral request, benefit and service awareness, coupon/reward notices, and any special promotions or events. We will use marketing collateral such as a brochure of services, e-flyers, business and message cards.

We will use direct e-marketing or regular mail to include supplement marketing materials with invoices. We will also use direct mail to send materials without invoices.

For our marketing communications we will loosely follow these guidelines:

- Three exposures minimum.
- 10 as a maximum.
- Communicate only when you have something to say:
 - Not every week, they will tune us out (unless the communication is very unique).
 - Every six weeks for a year long campaign.

Summer is the busiest time, peaking in July. Our communications should build up to this point.

Our direct marketing will include hosting a happy hour and ice-cream socials with the possibility of a cookie-caper. In these cases we will have a separate promotional strategy than the above guidelines. We will promote intensely several weeks leading up to the event using e-mails, direct mail, phone calls and word of mouth. See the Sales Process Section 4.5.2 to see how these events are designed as a "pull" strategy.

As usual, grass-roots networking for referrals and leads will also be nurtured through social outings, deliveries of breakfasts and/or boxes of cookies.

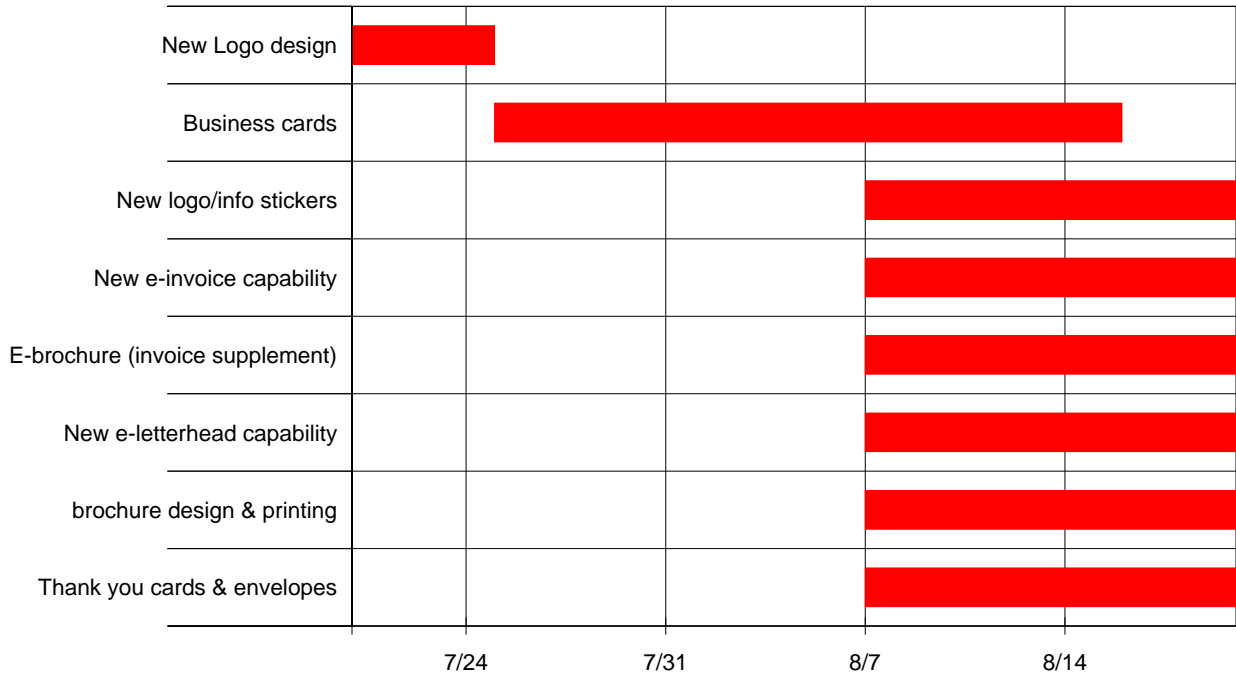
The following Marketing Collateral Milestones table reflects the tentative schedule of materials that should be in place for the direct marketing campaign. The Marketing Collateral Milestones chart presents a visual time line of its preceding table.

Next is the Direct Marketing Milestones table which reflects our tentative schedule of direct marketing efforts for the next year. The table is a guideline and should be altered to reflect needed changes while being mindful of earlier paragraphs in this section. The Direct Marketing Milestones chart presents a visual time line of its preceding table.

Marketing Collateral Milestones Table

Marketing Collateral	Start Date	End Date	Budget	Manager	Department
New Logo design	7/20/2006	7/25/2006	\$250		
Business cards	7/25/2006	8/16/2006	\$0		
New logo/info stickers	8/7/2006	8/20/2006	\$0		
New e-invoice capability	8/7/2006	8/20/2006	\$0		
E-brochure (invoice supplement)	8/7/2006	8/20/2006	\$0		
New e-letterhead capability	8/7/2006	8/20/2006	\$0		
brochure design & printing	8/7/2006	8/20/2006	\$750		
Thank you cards & envelopes	8/7/2006	8/20/2006	\$250		
Total Marketing Collateral Budget			\$1,250		

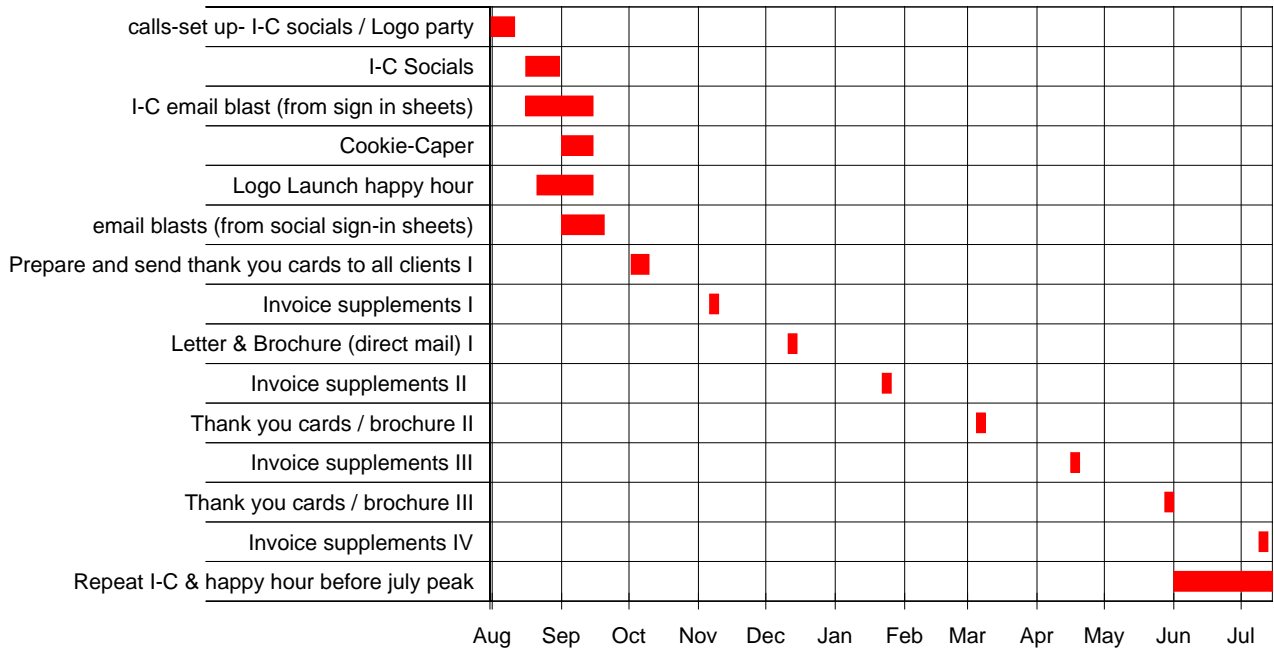
Marketing Collateral Milestones Chart



CRR Marketing Plan: August 2006 - August 2007

Direct Marketing Milestones Table					
Direct Marketing	Start Date	End Date	Budget	Manager	Department
calls-set up- I-C socials / Logo party	7/31/2006	8/11/2006	\$100	GM-AC-AE	Various
I-C Socials	8/16/2006	8/31/2006	\$1,500	GM-DM-AE	various
I-C email blast (from sign in sheets)	8/16/2006	8/31/2006	\$0		
Cookie-Caper	9/1/2006	9/15/2006	\$0		
Logo Launch happy hour	8/21/2006	9/15/2006	\$600	GM-AC	
email blasts (from social sign-in sheets)	9/1/2006	9/20/2006	\$0		
Prepare and send thank you cards to all clients I	10/2/2006	10/10/2006	\$40		
Invoice supplements I	11/6/2006	11/10/2006	\$0		
Letter & Brochure (direct mail) I	12/11/2006	12/15/2006	\$40		
Invoice supplements II	1/22/2007	1/26/2007	\$0		
Thank you cards / brochure II	3/5/2007	3/9/2007	\$40		
Invoice supplements III	4/16/2007	4/20/2007	\$0		
Thank you cards / brochure III	5/28/2007	6/1/2007	\$40		
Invoice supplements IV	7/9/2007	7/13/2007	\$0		
Repeat I-C & happy hour before July peak	6/1/2007	7/15/2007	\$1,000		
Total Direct Marketing Budget			\$3,360		

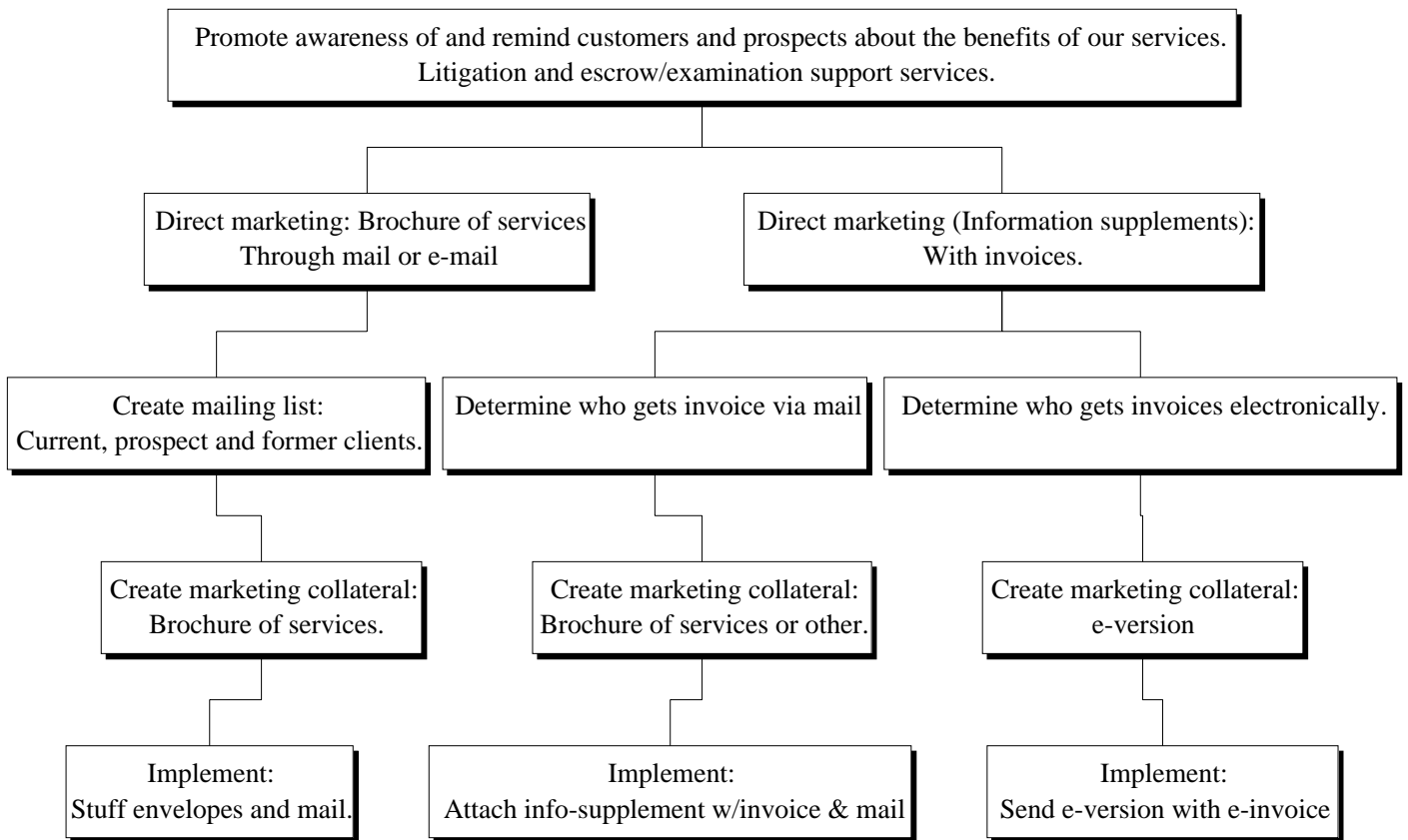
Direct Marketing Milestones Chart



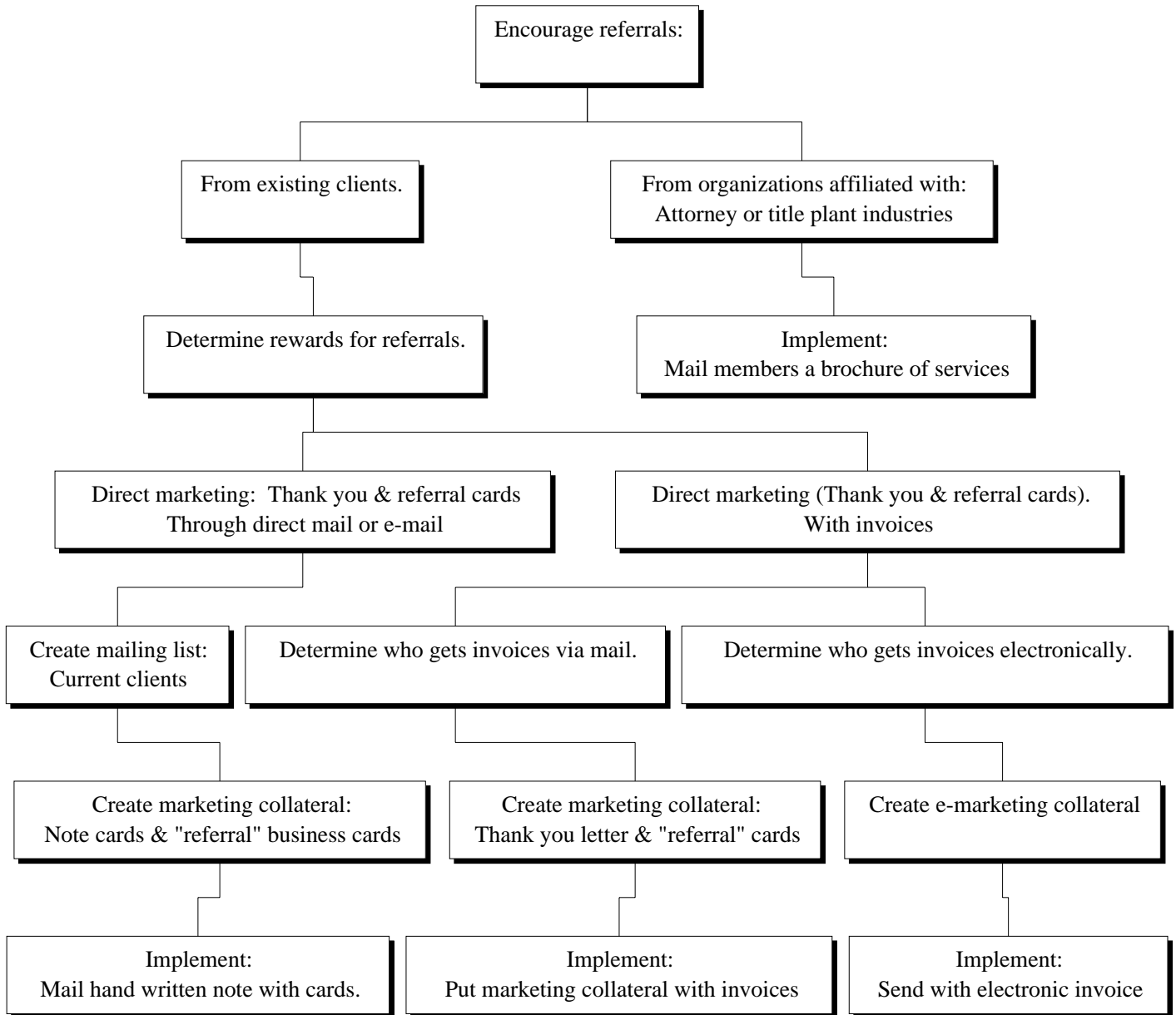
4.3.2.1. Strategy Pyramids

The following are basic strategy pyramids and flow charts for implementing and preparing direct marketing (i.e. direct mail, statement stuffers, events, etc...). Also included is a pyramid for marketing awareness training.

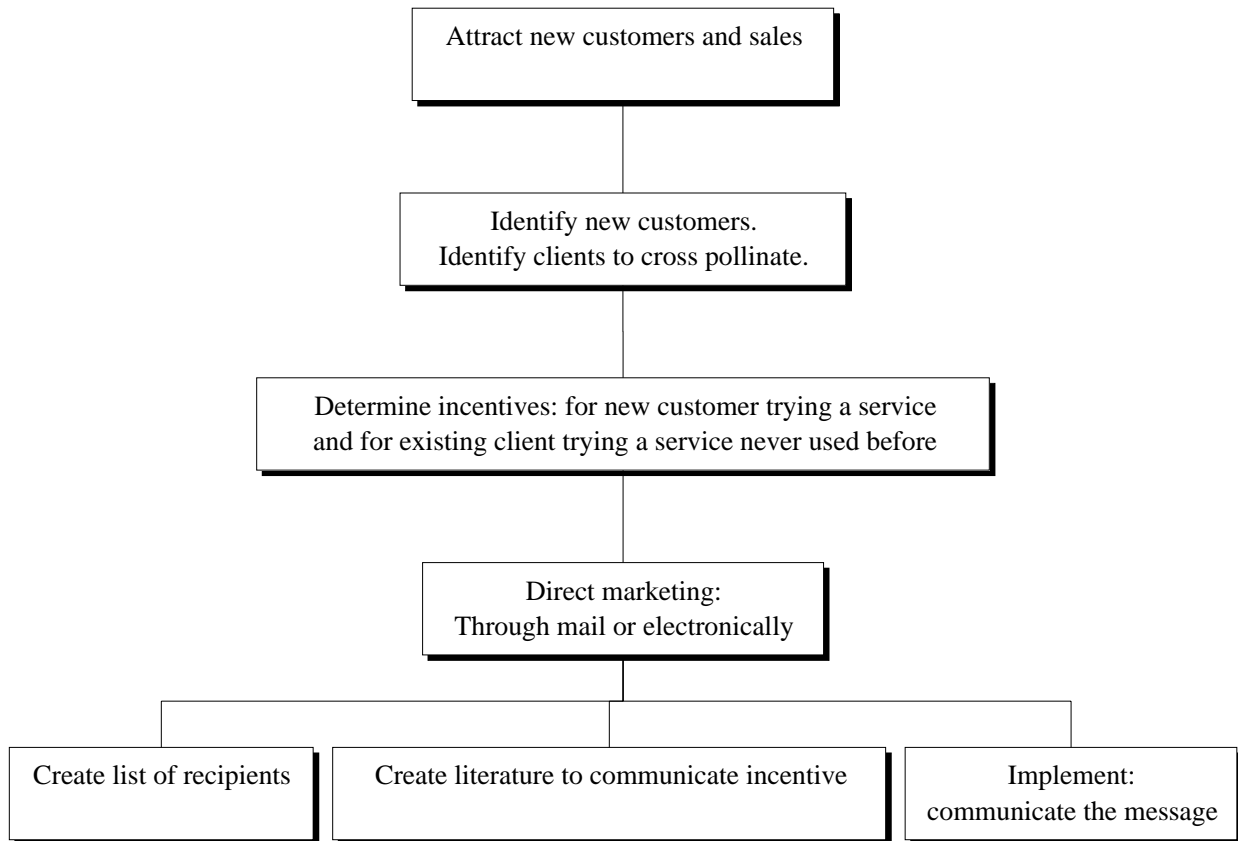
Strategy Pyramid: Create Awareness



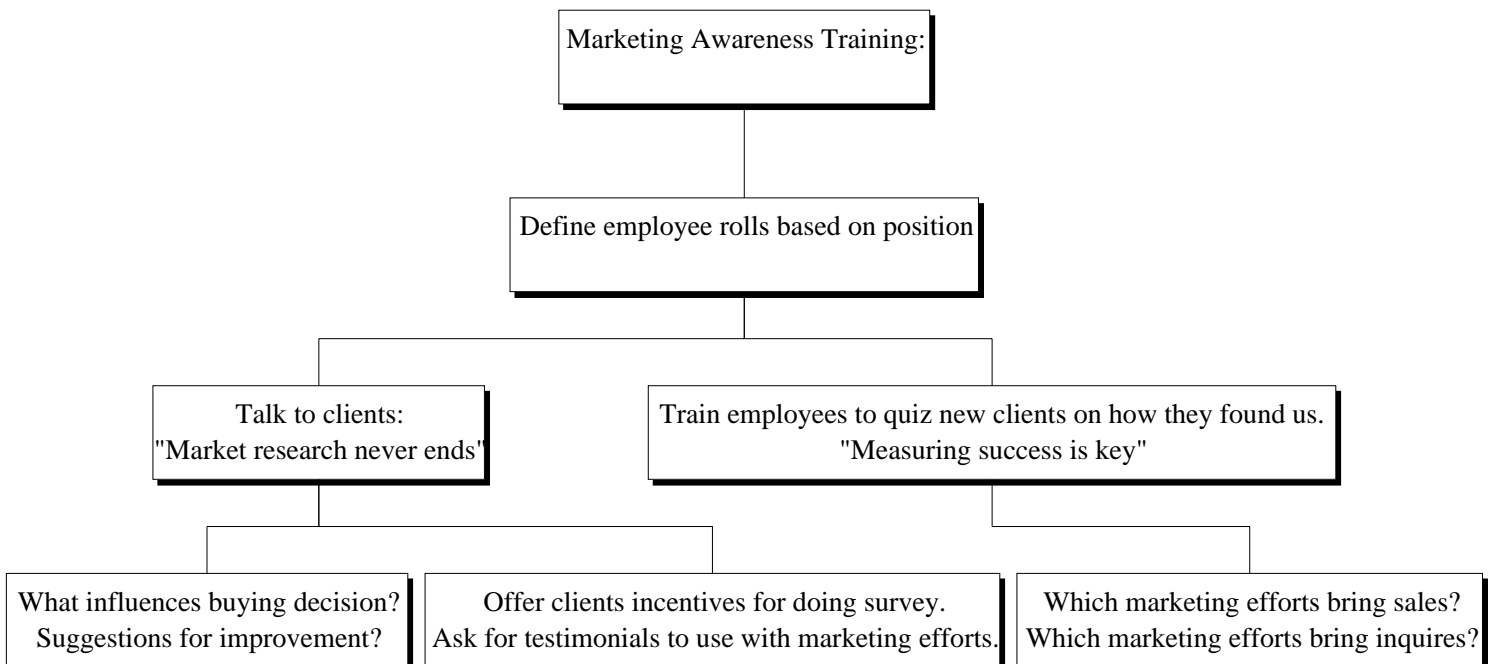
Strategy Pyramid: Encourage Referrals



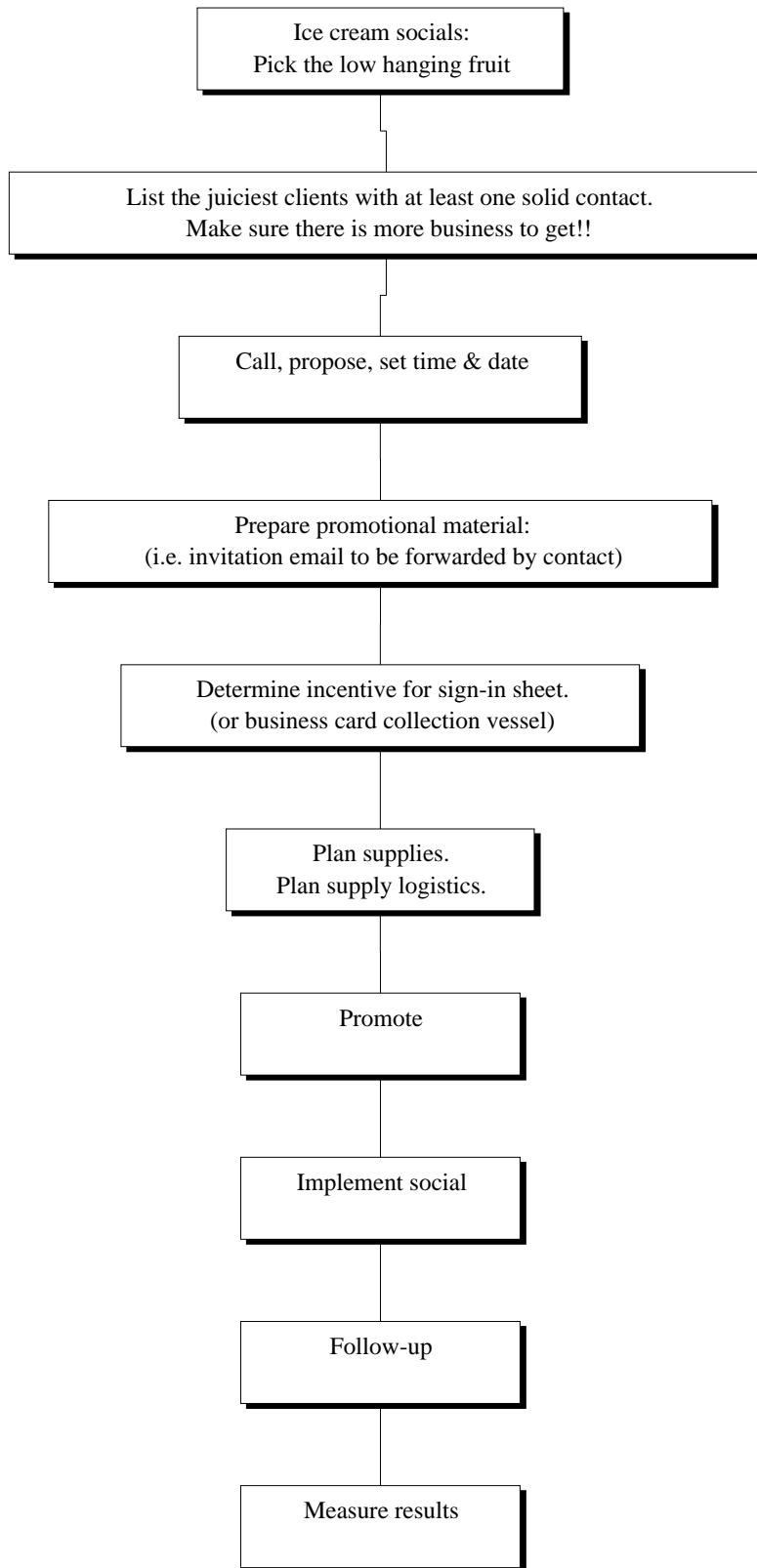
Strategy Pyramid: New Sales and Customers



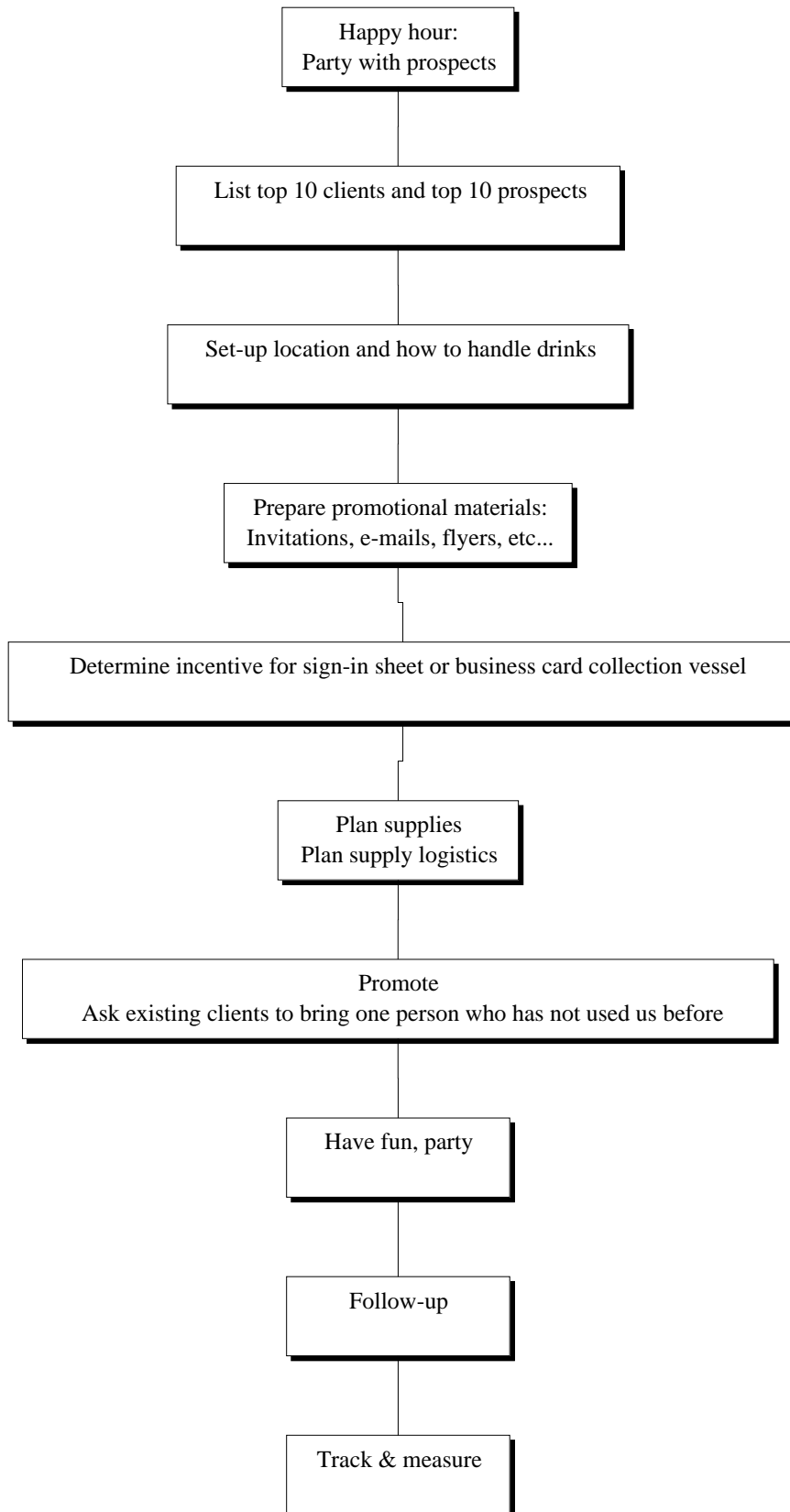
Strategy Pyramid: Marketing Awareness Training



Strategy Pyramid: Ice-Cream Social



Strategy Pyramid: Happy Hour



4.4. Sales Plan

We have a client base and our know-how sells through services that are responsive and helpful. At the center of our sales plan is making a good impression from the delivered service. The key is repeat business which we intend to cross-pollinate. At the same time we want to tap repeat business for referrals. While we intend to strengthen our base by picking the low hanging fruit, we also want to bring awareness to prospective clients who do not know about us yet. After laying the ground work through marketing efforts we hope to sell our service verbally or through our web-site by providing the information they need to make a decision.

We will measure growth in dollar volume and number of accounts.

4.4.1. Sales Strategy

Our "sales reps" are not sales people in the traditional sense. They are the leaders of their particular division within the company. They are the folks who can best explain services and answer questions. We will focus on the geographical area of Houston. The target customer is usually a legal secretary, administrator, paralegal or a receptionist and could even be a manager or president of a firm. Often it is not known who or how many users and/or decision makers there are in a firm.

We should focus our strategy on cross-pollinating current clients while gaining new clients through referrals and other means.

4.4.2. Sales Process

Cross-pollination: We will bring awareness of our service offerings to current clients.

- We will host a happy hour billing it as a new logo and new services launching party. Marketing collateral will be made available.
- When we host an event such as an ice-cream party or a happy hour we will talk about the services we offer and make marketing collateral available.
- Sent with thank you cards will be business cards that have a short list of pertinent services we offer printed on the back.
- Invoices will periodically contain service offering reminders (supplements i.e. statement stuffers).
- We might offer existing clients special offers or first-use discounts on services they have not used before. Once they use these services we are confident they will continue to do so.

New customer identification and how we will initially contact them:

- We will encourage referrals from existing clients through some type of reward or by simply making it known that we would like referrals.
- During socials and happy hour events a sign in sheet will be made available. Incentives to sign in with name, e-mail, phone number will be given.
 - Incentives might include a contest drawing for a free lunch, tickets to a movie, etc...
- From these sign in sheets we will build a prospective customer data base. We will contact them by phone, e-mail or both. Marketing materials will be sent.
- Marketing collateral will direct potentials to the web-site for detailed information about our services.
 - The collateral involved will be business cards, brief foldout of services offered, and greeting cards with hand written messages etc...
- We might “buy” new customers with special offers or first-use discounts. Once they use us we are confident they will continue to do so.

We will allow for flexible pricing strategy stipulated in our Marketing Mix Section 3.2.

We will follow up with phone calls, e-mails, and snail mail.

4.5. Web Plan

Our website is currently live and working, but needs some revamping, both of content and features to enhance the image of our business. Our redesigned site will be aesthetically pleasing and professional, keeping with the latest trends in user interface design. A site that is too flashy, or tries to use too much of the latest Shockwave or Flash technology can be over done. We aim for ease of use and functionality with just the slightest touch of flash. Future development will be based on resources and business needs.

Our internet presence is to serve as permanent, always-accessible information and branding tool for prospective and current clients. This important marketing tool will describe the benefits of our services, promote our referral program and might provide an opt-in news letter or a client feedback system.

Our state-of-the-art web based program provides many functions that save our client’s time and effort. Clients will be able to order services, get demos, and ask questions.

4.5.1. Website Goals

The goals for having and managing the website are as follows:

- **Informational**--This is a major marketing piece where clients and prospective clients can obtain information about our services and the benefits gained. We can develop an opt-in news letter to position ourselves as an information resource. We can develop a client feedback system to provide data for improving our services and our market research. A client referral page can be used to state our guidelines and rewards.
- **Sales channel**-- Clients can place orders, receive e-mail status reports and e-documents. We have "live" online help to enable visitors to truly interact with our business. We want to continuously improve this system by encouraging user feedback.
- **Brand-building**-- Our website appearance will reinforce our logo, tag lines and design standard. As with all our marketing collateral it will reinforce branding.
- **Market data source**-- We would like to tally the number of visits and the most frequent pages visited. Especially before and after marketing efforts to help with the measurement of the success or failure of the efforts.

We need to register the website with the appropriate search engines (www.submitit.com).

4.5.2. Website Marketing Strategy

Our web-site marketing strategy is very simple. We need to make sure our web-site reflects the brand and image of the company. When an attorney, escrow officer or examiner refers a client to us, we want them to be able to visit us online to get a very good sense of who we are, what we do, and why it benefits them to use us.

Our website allows client to do business with us online. We will look for ways to improve the system for ease of use.

Our "drive-to-web" campaign is integrated in our other marketing materials to increase web traffic. Once at our web-site, viewers can get a compelling view of our company's value proposition and services.

We are considering an opt-in online news letter where we can become an information source and build intimacy with clients. In addition to that we are considering a "reward for referrals" page along with a client feedback system.

We can also use the web-site to build our client data base. We use the database to make periodic contact with e-mail marketing.

4.5.3. Development Requirements

We currently have a site in place at www.courtrecords.com and it possesses functional components that we want to keep:

- The URL.
- State-of-the-art web based program.
- Ordering demo.
- Service sections (although we need to update the copy).
- Hyperlinks to different sections.
- Contact information.

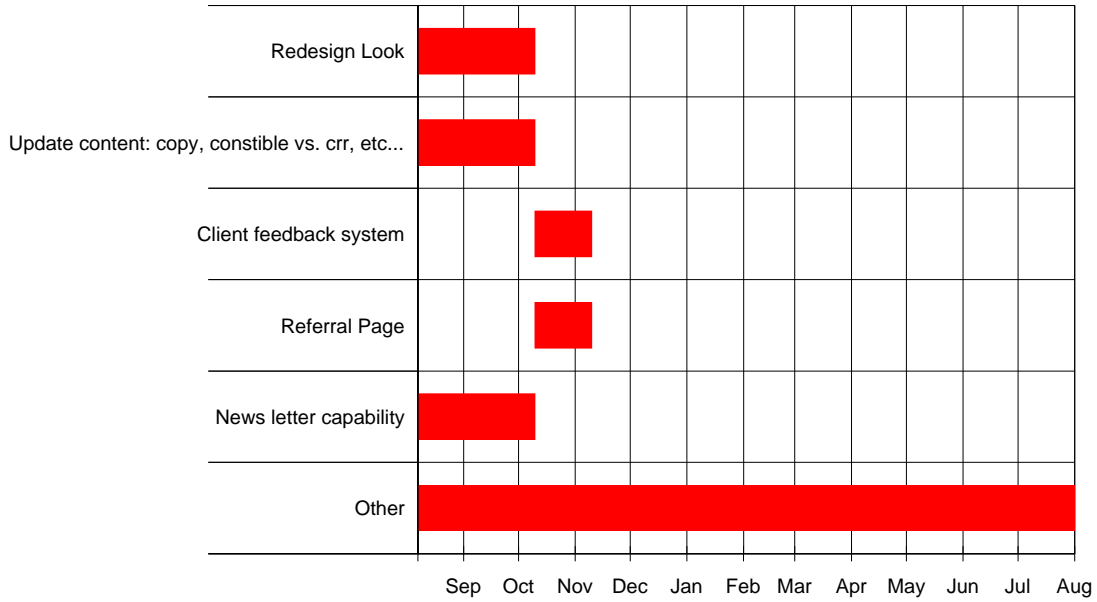
We need to:

- Revamp the text in the web-site to sell the benefits of our services (backed up by features). We have replacement copy available.
- Change the design characteristics to (a) reduce the clutter (b) reinforce our logo, & tag lines (c) draw attention to important or helpful features.
- We need to have the ability to send regular newsletters to clients and prospective clients who opt-in (and create new sections for this). This is part of our new incoming proprietary program.
- Section to invite feedback (for clients only).
- We need to have fresh updated content relevant to our industry (for the news letter).
- Develop a reward referral page.
- Actively access statistics to determine the number of visits, unique users and most frequent pages visited. Our current ISP provides this information.

Pay-Per-Click ROAS								
Network	Monthly Cost	Clicks	Leads Generated	Orders	Monthly Revenue	ROAS	Cost-per-click	Cost-per-lead
Google	\$0	0	0	0	\$0	0%	\$0.00	\$0.00
Yahoo!	\$0	0	0	0	\$0	0%	\$0.00	\$0.00
Other	\$0	0	0	0	\$0	0%	\$0.00	\$0.00
Total	0	0	0	0	0	0%	\$0.00	\$0.00

Milestones					
Web Development	Start Date	End Date	Budget	Manager	Department
Redesign Look	8/7/2006	10/10/2006	\$0		
Update content: copy, constable vs. crr, etc...	8/7/2006	10/10/2006	\$0		
Client feedback system	10/10/2006	11/10/2006	\$0		
Referral Page	10/10/2006	11/10/2006	\$0		
News letter capability	8/7/2006	10/10/2006	\$0		
Other	8/7/2006	8/1/2007	\$0		
Total Web Development Budget			\$0		

Web Development Milestones



5. Financials

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5.1. Break-even Analysis

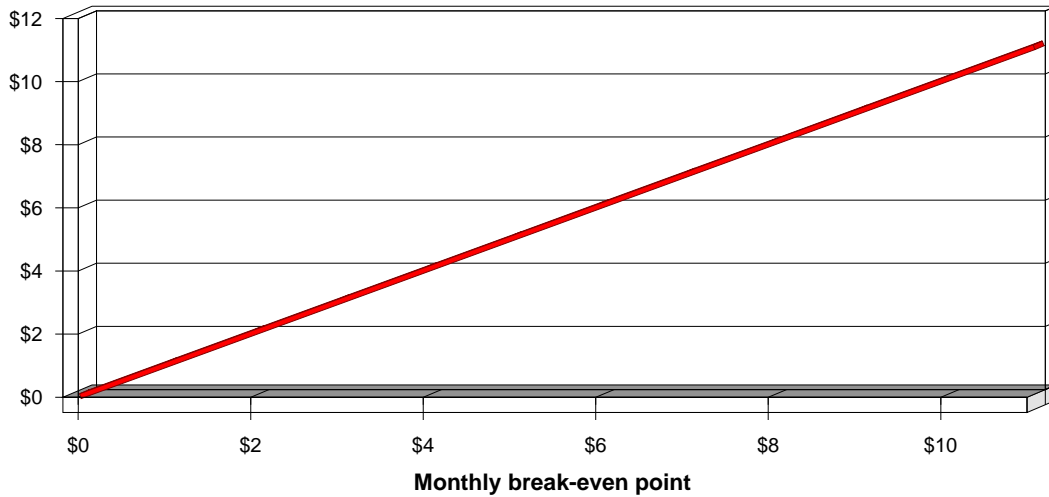
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Fixed Costs	
Cost	
Rent or Lease	\$0
Professional Services	\$0
Payroll	\$0
Interest Payments	\$0
Utilities & Telephone	\$0
Non-discretionary Marketing Expenses	\$0
Other	\$0
Total Fixed Costs	\$0

CRR Marketing Plan: August 2006 - August 2007

Break-even Analysis	
Monthly Revenue Break-even	\$0
Assumptions:	
Average Percent Variable Cost	0%
Estimated Monthly Fixed Cost	\$0

Break-even Analysis



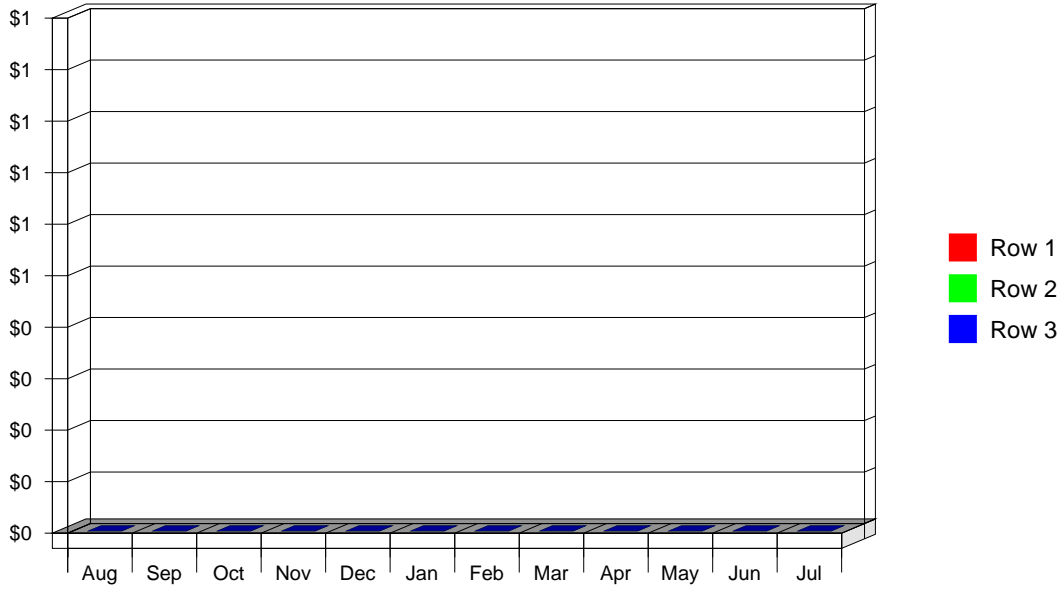
Break-even point = where line intersects with 0

5.2. Sales Forecast

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Sales Forecast			
	FY 2007	FY 2008	FY 2009
Sales			
Row 1	\$0	\$0	\$0
Row 2	\$0	\$0	\$0
Row 3	\$0	\$0	\$0
Total Sales	\$0	\$0	\$0
Direct Cost of Sales			
Row 1	\$0	\$0	\$0
Row 2	\$0	\$0	\$0
Row 3	\$0	\$0	\$0
Subtotal Direct Cost of Sales	\$0	\$0	\$0

Sales Monthly

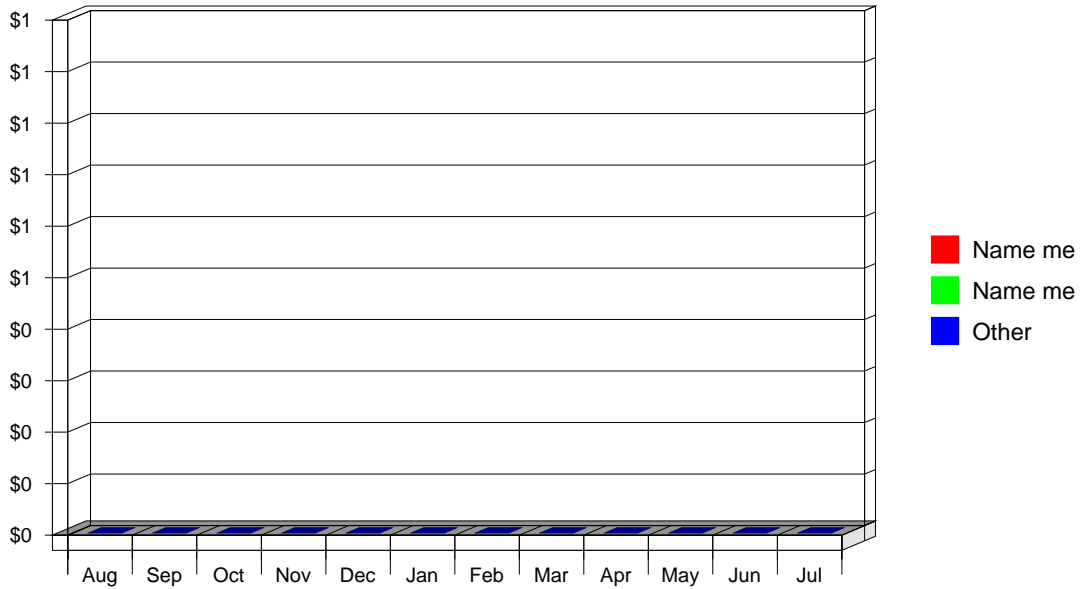


5.3. Expense Forecast

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Marketing Expense Budget			
	FY 2007	FY 2008	FY 2009
Name me	\$0	\$0	\$0
Name me	\$0	\$0	\$0
Other	\$0	\$0	\$0
	-----	-----	-----
Total Sales and Marketing Expenses	\$0	\$0	\$0
Percent of Sales	0.00%	0.00%	0.00%

Monthly Expense Budget

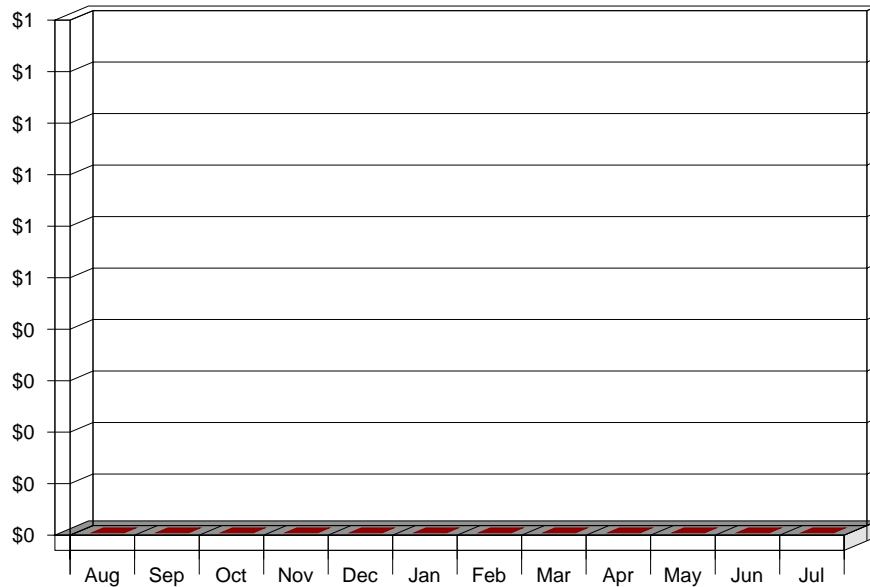


5.4. Contribution Margin

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Contribution Margin			
	FY 2007	FY 2008	FY 2009
Sales	\$0	\$0	\$0
Direct Cost of Sales	\$0	\$0	\$0
Total Cost of Sales	\$0	\$0	\$0
Gross Margin	\$0	\$0	\$0
Gross Margin %	0.00%	0.00%	0.00%
Marketing Expense Budget	FY 2007	FY 2008	FY 2009
Name me	\$0	\$0	\$0
Name me	\$0	\$0	\$0
Other	\$0	\$0	\$0
	-----	-----	-----
Total Sales and Marketing Expenses	\$0	\$0	\$0
Percent of Sales	0.00%	0.00%	0.00%
Contribution Margin	\$0	\$0	\$0
Contribution Margin / Sales	0.00%	0.00%	0.00%

Contribution Margin Monthly



6. Controls

One purpose of the marketing plan is to serve as a guide for the company and future interns or consultants, if any. Another purpose is to initiate action that will generate additional revenues for Court Record Research, Inc. and better position us for the future.

Marketing ideas have little value until they are implemented and measured. Our marketing team will ensure that the plan is implemented to the best of their ability and with the highest levels of efficiency and accuracy. The following areas will be monitored to gauge performance:

- Revenue- monthly and annual.
- Expenses- monthly and annual.
- New customer acquisitions- monthly and annual.
- Existing client cross-pollination.
- Repeat business.
- Customer satisfaction.

Reviewing results throughout the year will enable us to evaluate and modify our marketing plan as necessary. Monitoring progress takes some discipline, but it may prove to be the most valuable function of the marketing plan.

Programs that are not working need to be changed. Programs that meet or exceed expectations should be replicated. This is where the value of a dynamic marketing plan benefits us most.

6.1. Implementation

A marketing plan that does not get implemented is worthless. We need to be accountable to its implementation.

We will have brief meetings (or reports) once a month to make sure we are on track with our milestones and re-adjust our goals as we gather new data. Once a quarter, we will review this marketing plan to ensure that we stay focused on our marketing strategy.

6.1.1. Implementation Schedule

The next table is a combination of the various milestone tables. Accordingly, this table shows some of the general activities, and their target completion dates, as well ownership. Responsible parties understand the programs they have been assigned and the specific actions involved with each.

Date ranges and budgets are clearly established. It is important to accomplish each one within the specified time frame and on budget. If necessary, the programs will be revised and will become a topic of focus at the monthly meetings. At the end-of-the-year meeting we will evaluate annual results and validate or challenge the marketing plan for the upcoming year.

CRR Marketing Plan: August 2006 - August 2007

Milestones					
Advertising	Start Date	End Date	Budget	Manager	Department
Texas Legal Directory	10/1/2006	10/10/2006	\$0		
NAPPS	10/10/2006	10/20/2006	\$0		
NPRRA	10/10/2006	10/20/2006	\$0		
Other	10/10/2006	10/20/2006	\$0		
Total Advertising Budget			\$0		
Direct Marketing	Start Date	End Date	Budget	Manager	Department
calls-set up- I-C socials / Logo party	7/31/2006	8/11/2006	\$100	GM-AC-AE	Various
I-C Socials	8/16/2006	8/31/2006	\$1,500	GM-DM-AE	various
I-C email blast (from sign in sheets)	8/16/2006	9/15/2006	\$0		
Cookie-Caper	9/1/2006	9/15/2006	\$0		
Logo Launch happy hour	8/21/2006	9/15/2006	\$600	GM-AC	
email blasts (from social sign-in sheets)	9/1/2006	9/21/2006	\$0		
Prepare and send thank you cards to all clients I	10/2/2006	10/10/2006	\$40		
Invoice supplements I	11/6/2006	11/10/2006	\$0		
Letter & Brochure (direct mail) I	12/11/2006	12/15/2006	\$40		
Invoice supplements II	1/22/2007	1/26/2007	\$0		
Thank you cards / brochure II	3/5/2007	3/9/2007	\$40		
Invoice supplements III	4/16/2007	4/20/2007	\$0		
Thank you cards / brochure III	5/28/2007	6/1/2007	\$40		
Invoice supplements IV	7/9/2007	7/13/2007	\$0		
Repeat I-C & happy hour before July peak	6/1/2007	7/15/2007	\$1,000		
Total Direct Marketing Budget			\$3,360		
Web Development	Start Date	End Date	Budget	Manager	Department
Redesign Look	8/7/2006	10/10/2006	\$0		
Update content: copy, constable vs. crr, etc...	8/7/2006	10/10/2006	\$0		
Client feedback system	10/10/2006	11/10/2006	\$0		
Referral Page	10/10/2006	11/10/2006	\$0		
News letter capability	8/7/2006	10/10/2006	\$0		
Other	8/7/2006	8/1/2007	\$0		
Total Web Development Budget			\$0		
Marketing Collateral	Start Date	End Date	Budget	Manager	Department
New Logo design	7/20/2006	7/25/2006	\$250		
Business cards	7/25/2006	8/16/2006	\$0		
New logo/info stickers	8/7/2006	8/20/2006	\$0		
New e-invoice capability	8/7/2006	8/20/2006	\$0		
E-brochure (invoice supplement)	8/7/2006	8/20/2006	\$0		
New e-letterhead capability	8/7/2006	8/20/2006	\$0		
brochure design & printing	8/7/2006	8/20/2006	\$750		
Thank you cards & envelopes	8/7/2006	8/20/2006	\$250		
Total Marketing Collateral Budget			\$1,250		
Totals			\$4,610		

6.2. Keys to Success

Our keys to success include:

- Continue to develop client referrals from individuals and business contacts.
- Determining the decision makers.
- Providing services that are quick accurate and reliable.
- Follow through with marketing.
- Measurement of our marketing efforts.

6.3. Market Research

Determine the needs of clients through **market research**. Understand the client's problems, needs or desires and how our product solves those needs. Properly done market research is expensive: it takes time and requires professional expertise. We will use inexpensive ways of getting enough data to help decision making: informal and formal surveys and brain-storming.

1. Talk to current, prospective or former clients using one-on-one Q&A or surveys. Poll them online. Offer incentives for doing survey:
 - a. How did they learn about our services - advertising, direct mail, word-of-mouth, Yellow Pages, or one of our events?
 - i. So we can measure the results of implementing the promotional plan.
 - ii. Keep track of how much these new customers spend.
 - iii. "How did you hear about us?"
 - If referred, by who?
 - b. Ask customers for suggestions for improvement.
 - c. Learn what qualities the customer values most about CRR's services - selection, convenience, service, reliability, availability, affordability? Analyze and learn from this input.
 - d. Learn what customers say about competition.
 - e. Talk to former customers:
 - i. Why did they switch?
 - f. Train employees to question customers and prospects.
 - i. Can be best source of information about customer likes and dislikes.
 - g. Get testimonials from clients to use in marketing communications and online.
 - h. Ask clients for names of potential clients as referrals.

2. Measure and track results of marketing.
3. Stay aware of market trends and forecast.

Useful web sites for surveys and questionnaires:

1. www.pewinternet.org
2. www.questionpro.com

Another avenue for information pertaining to the state of our clients business is participating in trade associations. Some are dry holes. It is important to be selective and do some pre-investment exploration first.

6.4. Contingency Planning

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