

Company Research Template

Name: _____

Company: _____

Business Model and Growth Strategy: How does their business operate? What are the ways they generate income? What is their growth strategy (merger and acquisition vs. organic growth)? What is their investment strategy (infrastructure, technology, human capital)?

Company Structure: What is their geographic presence/coverage, corporate hierarchy, departmental organization, reporting structure, etc.?

Leadership (Changes): Who are the leaders holding key positions? Who's been newly hired or promoted? Where were those people previously?

Trigger Events: Are they experiencing rapid growth, expansion, hiring, aggressive goals, mergers and acquisitions, or reductions in force?

Market: What vertical industries, horizontal business functions, or customer segments are they focused on? Who are some of their key customers?

Market Position and Strategy: How are they doing within the markets they are focused on (i.e., market share or market penetration)? How do they position themselves in the marketplace (technology leadership, customer intimacy, responsive service, low-cost provider, etc.)?

Competition and Differentiation: What other companies do they compete against consistently? What makes them unique, different, or better in terms of their products, their services, their company, their people, etc.?

SWOT: What are their primary strengths and weaknesses? What do they (or you) perceive as their greatest opportunities or threats?

External Factors: What pending legislation, litigation, government regulations, or changing industry standards could impact their business?

Recent Performance: How have they done compared to their own historical performance, and compared to competitors (market capitalization, stock performance, growth, profitability, etc.)?

Outlook for the Future: What do they believe the next few quarters or next few years will hold for them? What does the analyst community think?

Goals and Objectives: What are their stated business goals and objectives? What strategies or tactics have they divulged which they will employ to achieve them?