

**University of Chicago Booth School of Business**

**Marketing Research (MR) Course: Project Charter**

*Please briefly answer each of the questions below so that we can understand the project goals and scope. Note that this is the information students will see when prioritizing their project preferences.*

1. **Sponsoring Organization** (please include all the requested information):
2. ***Executive Sponsor*** (name, title, email, phone):
3. If different from above, the ***Project Point Person*** for weekly interactions with team (name, title, email, phone):
4. ***Back-up Contact Person*** in case Project Point Person is unavailable (name, title, email, phone):
5. Brief description of sponsoring organization (include company website):
6. Who should receive the ***Invoice*** for the sponsorship fee? Who should receive the fully-executed ***NDAs*** from students and faculty? (please include email & phone number if not previously listed)

* Invoice:
* Countersigned NDAs:

1. Please note any special instructions required for ***invoicing***:
2. **Project Definition and Scope:**
3. What are the ***business issues*** that are driving interest in this project? (Please describe why the company is interested in the project)
4. Please describe the ***business decision(s)*** for which this project will be an input.
5. Please define the ***category*** that will be the focus of this research-based project.
6. Please describe the ***target consumer audience*** for this research-based project.
7. **Project Goals and Metrics:**
8. What are the primary goals of the project? (Please be specific as to what you would like this project to do for the business.)
9. How will you evaluate success of this project? Are there specific metrics (e.g. revenue growth, increased market share or customer loyalty, brand image, etc.)?
10. Any additional expectations for this project?
11. **Project Data:**

***The core of the Marketing Research course projects is a quantitative survey (online survey with representative sample based on project definition/needs). The project may also include initial qualitative research to prepare for the quantitative survey. We generally are not able to perform projects that target highly-specialized populations (e.g. doctors, most B-2-B audiences).***

1. Does the company require that this project use an *existing customer list* for the online quantitative survey? If yes, please describe the nature and size of this list. ***Note*: The customer contact file needs to be provided no later than the first week of class.**

The default is that the company won’t provide an existing customer list.

1. Does your organization have additional information that would be helpful for the team to review in the early stages of this project (for example, company / customer / category / competitor information, past market research studies, financial information)? Please list below. **Company data and/or reports can be provided directly to the student team during the kick-off meeting (after students have signed the NDA)**.
2. **Transferring Project Data to You from the Student Team’s Research:**

***Qualtrics*** is the quantitative survey vendor used in this class, and ***UserTesting*** is the qualitative research vendor. At the end of the project, Qualtrics and UserTesting will transfer project data to your company.

***For Qualtrics, please let us know your preference for either (a) or (b) below:***

1. Qualtrics can set up a new account in your company's name with the project's quantitative survey data (there is no cost to your company);

***OR***

1. Qualtrics can transfer the quantitative survey data to your company’s existing Qualtrics account (if you already have one set up).

***Finally, who from your company should Qualtrics and UserTesting interact with to transfer the data?***