DATA STOCK INC
Data Deal Questioner

Section: Purpose

The Purpose of the Form is to help any Business, Client Business, and/or Data Broker walk thru the process of a Data Deal and maximize the Goal, Objectives, and/or Profits for that Business.

Section: Industry

1. **Which of your Businesses would be interested in a data deal?**

2. **Is this for your Business (or your client)?**

3. **What industry sector is the Business in?**
   - ☐ Agricultural
   - ☐ Commercial
   - ☐ Cultural
   - ☐ Entertainment
   - ☐ Governmental
   - ☐ Industrial
   - ☐ Military
   - ☐ Technological
   - ☐ Utilitarian

Section: Value & Data Set Definition

4. **Who are your business's target markets?**
   - ☐ Demographics Types: _____
   - ☐ Geographics Types: _____
   - ☐ Behaviors Types: _____

5. **What does your business (or client value) most?** *(Please only 1 choice)*

- ☐ Strong Customer Loyalty
- ☐ More Market Share
- ☐ Explore New Markets
- ☐ Cost Savings

6. How are you currently monitoring value?
- ☐ Internal Data & Reports
- ☐ External Data & Reports
- ☐ Both
- ☐ Neither

7. What target market's data stocks would your business like to see for 180 days?
- ☐ What would be your Starting Bids?
- ☐ What would be your Highest Bids?
- ☐ What would be your Lowest Bids?

8. What are your Top 5 data points that DATA STOCKS INC must collect per selected data stock?
- ☐ Example: Chrome App
  - Keywords
  - Clicks
  - History
  - Durations
  - Clicks

9. What Data Filters are needed?
- ☐ Demographic Filters?
- ☐ Geographic Filters? Countries?
- ☐ Behavior Filters?

Section: Analysis & Strategy

10. Which strategic options will produce the most Value for the Business?

- ☐ **Strategy 1 | "Market Recons"**
  - ▪ **Purpose |** Quick Views into Any Market
  - ▪ **When to Apply |** Business wants to view populations that are:
    - Current Customers
    - Competitors' Customers
    - Potential Customers

- **Sample Size |** Small | Sample Populations < 10% of Total Populations
- **Goal |** Produce Profitable Market Insights

- **Strategy 2 | "Customer Delight Monitoring"**
  - **Purpose |** Full Monitoring of a Market
  - **When to Apply |** Business wants to delivery "Customer Delight"
  - **Sample Size |** Large | Sample Populations > 50% of Total Population
  - **Goal |** Reach Just-In-Time Interactions to produce Hyper Customer Loyalty

- **Strategy 3 | "Rally Customers"**
  - **Purpose |** Buy Consent to Monetize Current Data
  - **When to Apply |** Business wants to legally monetize data that it already controls
  - **Sample Size |** Large | Sample Populations > 80% of Total Population
  - **Goal |** Generate Data Monetization with Current Data (ex. Relevant Ads)

11. What is the best Population size or Sample size?
- Dependents on Strategy (ies)
- Calculator

12. What is the <u>minimum and maximum</u> Population of the Data Deal?
- Minimum Population? _____
- Maximum Population? _____

13. Of the 180 days, how many days should be real-time data days?
- Real-Time? (ex. All Real-Time Data Days = [0/180])

14. Of the remaining days, how many days would be historical data?
- Historical? (ex. All Historical Data Days = [180/0])

15. Does the Business wants to speed up the Data Deal?
- Yes. Exercise "Force March" Mode and speed up Data Deal.
  - *Front Loaded Payment: 30% Value of Maximum Population*
- No. Exercise "Laissez Faire" stance and float Data Deal in Data Market.
  - *No Payment Required*

16. Does the Business require BI expert?
- Yes
- No

17. Which Business Intelligence software does the Business current use?
- Tableau
- Domo
- MS Power BI
- Palantir

☐ [IBM Cognos](#)
☐ Other
☐ None

Section: Finance Structure

18. **What percentage of Margin Balance will the Business place?**
    ☐ 70% Starting Margin Balance | DS Broker Margin = 25% (Saving 25%)
    ☐ 60% Starting Margin Balance | DS Broker Margin = 30% (Saving 20%)
    ☐ 50% Starting Margin Balance | DS Broker Margin = 35% (Saving 15%)
    ☐ 40% Starting Margin Balance | DS Broker Margin = 40% (Saving 10%)
    ☐ 30% Starting Margin Balance | DS Broker Margin = 45% (Saving 5%)
    ☐ 20% Starting Margin Balance | DS Broker Margin = 50%

19. **When will the Business like to place that Margin Balance?**
    ☐ Now | DS Broker Margin = X (Saving 10%)
    ☐ 15 Days | DS Broker Margin = X+2% (Saving 8%)
    ☐ 30 Days | DS Broker Margin = X+4% (Saving 6%)
    ☐ 45 Days | DS Broker Margin = X+6% (Saving 4%)
    ☐ 60 Days | DS Broker Margin = X+8% (Saving 2%)
    ☐ 75 Days | DS Broker Margin = X+10%

20. **Is there synergy if multiple businesses sponsor the same Data Deal?**
    ☐ Yes | Who are the other ally businesses? _____
    ☐ No | 1 Data Deal to 1 Business

    ✓ *PRO: Partnerships can spread costs; increase populations; increase visibility.*
    ☒ *CON: Not all partnerships last forever = "Market Knowledge" Advantage reduced*
    ☒ *CON: Increases Anti-Trust Possibilities*

21. **What is Business's Name of their Financial Institution?**

22. **What is the Address of Your Financial Institution?**

23. **What is the Name of the Account?**

24. Who is the Account Holder?

25. What is the Routing Number?

26. What is the Account Number?