

2012 INTERNATIONAL CAREER DEVELOPMENT CONFERENCE

Written Event Winners



BUSINESS SERVICES OPERATIONS RESEARCH EVENT

1st Place

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Business Services Operations Research Event

JetSelect Aviation

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I. Executive Summary

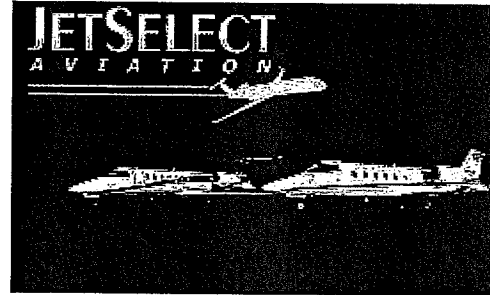
Business Overview: JetSelect Aviation is a private jet chartering company based out of Columbus, Ohio. JetSelect has 27 jets and 12 hubs located throughout the United States. The company's target market consists of Central Ohio corporations and high-income individuals that have private chartering needs and wants.

Problem: Competition in the private chartering industry is intense and JetSelect's management believes the company is losing customers to competitors that offer loyalty programs. JetSelect also lacks a process to measure customer satisfaction with their service.

Research Methods Used in the Study:

The following methods were used in our study:

- Customer Interviews
- Secondary Research
- Corporate Interviews
- Facility Tours



Findings and Conclusions:

- Customers are interested in the idea of a rewards program that provides real value.
- JetSelect's in-flight food is below the standard found on other private jets.
- Many businesses use the Net Promoter Score metric to measure customer loyalty.
- Each person that flies with Netjets (JetSelect competitor) has their own personal account representative
- In-flight Wi-Fi is very important to business travelers, and competitors are rapidly upgrading their fleets with this feature.

Proposed Strategies: Using our research findings, we developed a plan to help JetSelect increase their customer loyalty. Specific activities described in this project include:

1. Creating a rewards plan to reward JetSelect's best customers and encourage repeat business
2. Improving the quality of the food served during flights to improve customer satisfaction
3. Launching a smart phone application to make reserving a plane more convenient
4. Creating a referral program to provide an incentive for current customers to recommend JetSelect
5. Updating existing aircraft with Wi-Fi to meet the needs of business customers
6. Measuring customer satisfaction and loyalty to improve sales and profits

Investment: The total investment needed for this program will vary based on the number of participants in our new rewards program. Complete expense details are provided in the main body of this project.

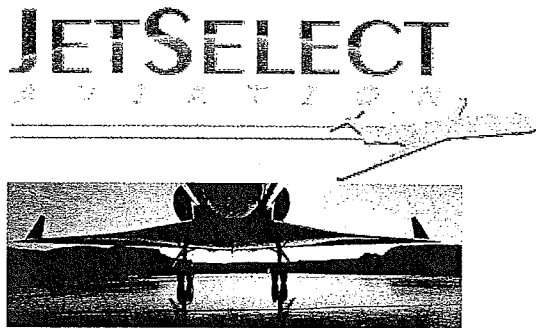
Outcomes: Implementing this plan will help JetSelect to:

- ✓ Create more customer loyalty by increasing customer satisfaction
- ✓ Provide value to clients by starting a new loyalty and rewards program
- ✓ Increase profits and sales
- ✓ Create a system to measure customer satisfaction

II. Introduction

A. Description of the Business

JetSelect Aviation is a private jet chartering company based out of Columbus, Ohio. Robert Austin started the company in 2005 with six light-mid jets and one central hub. Today, the company has grown to a multi-million dollar business with 27



planes and 12 hubs located all around the United States. JetSelect charters private flights and customizes the journey to meet the individual client's needs and wants. The target market for JetSelect includes area corporations and affluent individuals who desire charter air service.

JetSelect has differentiated themselves from the competition in several ways. First, instead of making clients invest large sums in fractional ownership in a plane, JetSelect charges per flight. They also have a 24/7 booking service, which allows customers to book their flights at their convenience. Finally, JetSelect is one of only 18 operators in the world to achieve the prestigious Industry Audit Safety Standard.

JetSelect's main competitors in the area include NetJets, Delta Private, and Lane Aviation. These competitors have all implemented customer loyalty programs. This project is being completed for JetSelect CEO, Mr. Robert Austin, who defines a loyal customer as a person who flies with JetSelect more than three times a year. He also gave us the research problem for this study:

Client Problem: Management believes they are losing customers to chartering companies that offer loyalty programs. We have been asked to conduct research and develop recommendations for a new JetSelect customer loyalty program.

B. Description of the Community

Economic Data:

Columbus is the largest city in Ohio and the 15th largest city in the United States. The city has a diverse mix of businesses from many industries including technology, retail, financial services, and logistics. As the state's capital city, Columbus has many government agencies.

The surrounding central Ohio market is also home to 15 Fortune 1,000 companies, six Fortune 500 companies, and four nationally recognized healthcare systems. Large corporations with major presences in the area include Cardinal Health, Nationwide, Limited Brands, American Electric Power, and Big Lots.

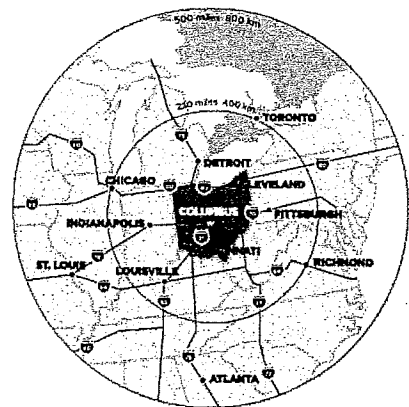
More than 140,000 college age students attend one of the twenty area universities. Around 45,000 students alone attend The Ohio State University. The size and variety of the city makes it an excellent environment for any type of business.

Geographic Data:

Columbus is located in the geographic center of the state and is within a one-day drive or a one-hour flight of nearly half the population of the U.S. and Canada. Columbus is also home to Port Columbus International Airport, which is the largest airport in the central Ohio area. In the past five years, the

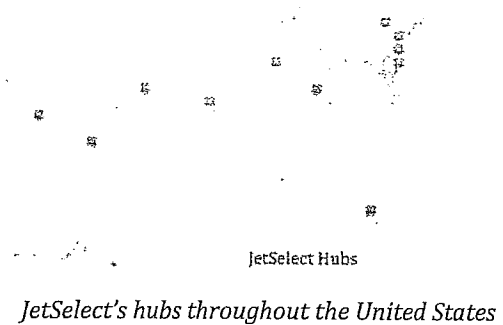
Major Central Ohio Businesses

- ❖ Abercrombie and Fitch
- ❖ JPMorgan Chase
- ❖ Nationwide Finance
- ❖ Ohio Health
- ❖ Limited Brands
- ❖ Abbot Labs
- ❖ Honda of America
- ❖ Kroger Co.
- ❖ Whirlpool
- ❖ Huntington Banks



Columbus is within a one-hour flight of nearly half the population of the U.S. and Canada

Columbus regional Airport Authority has invested more than \$210 million in capital improvements to Port Columbus. Improvements include the newly reconstructed International Gateway, significantly increasing the efficiency of traffic flow into and out of the airport.



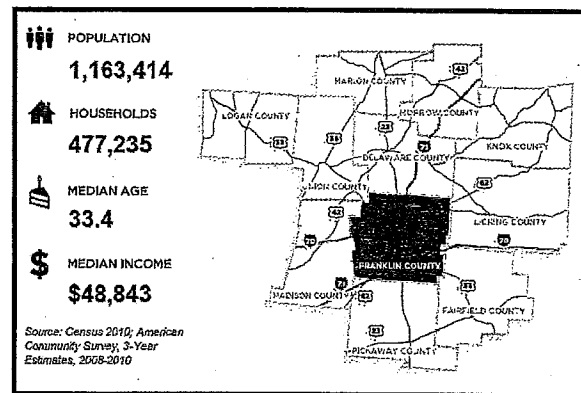
JetSelect currently has 12 hubs located across the United States. Its Columbus, Ohio, hub is important due to its relatively close proximity to major cities like Chicago, New York, and Atlanta. It is also a quick flight to popular vacation spots in Florida, Mexico, and the Caribbean Islands.

Demographic Data:

Central Ohio has a population of 1,163,414, which is up 10.6% since 2000. The central Ohio area has 477,235 households. The median income for families located in central Ohio is \$48,843. Along with this statistic, the average home value is \$141,400. Approximately 40% of people have a college degree, which explains the increased employment mainly in government, professional services, retail, education, and healthcare. The racial background is 75% White/Caucasian, 25% African American, 15% Hispanic/Latino, and 8% Asian.

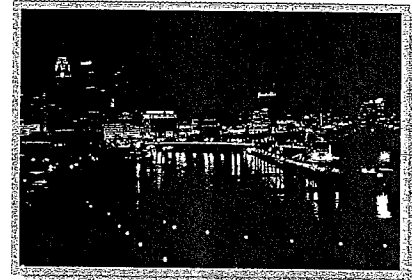
Socioeconomic Data:

The Columbus, Ohio, metropolitan area offers individuals and businesses all the amenities one would expect of a major market city, including great restaurants, shopping,



schools, professional sports, and the arts. The CASI lifestyle database was used to research the socioeconomic data from central Ohio. According to the website, common lifestyles for this area include:

- ❖ Upper-middle class families with medium to large houses
- ❖ Empty nesters, with college age children
- ❖ Baby boomers with disposable incomes for entertainment events
- ❖ Active adults who enjoy outdoor activities
- ❖ Ethnically diverse professionals with above average income levels



C. Description of Business's Target Market

Jet Select's target market consists of Central Ohio corporations and high-income individuals that have private chartering needs and wants. Currently, JetSelect has 375 customers that fly with them. We have been asked to create a program to keep these customers loyal to JetSelect. A new customer loyalty program will also enable JetSelect to gain new customers. The charts detail the target market for this campaign.

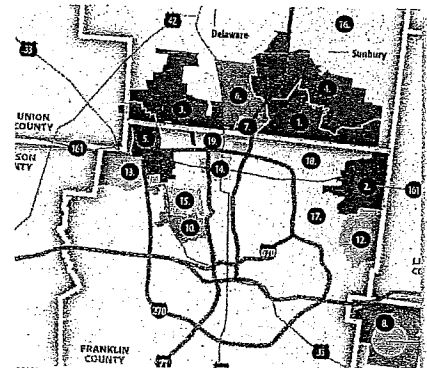
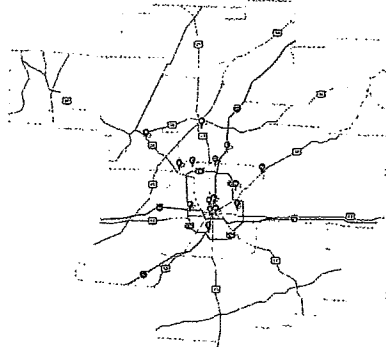
Affluent Market:

Columbus' Wealthiest Zip Code

1. 43082 – Westerville
2. 43054 – New Albany
3. 43065 – Powell
4. 43021 – Galena
5. 3017 - Dublin

Columbus' wealthiest suburbs and major companies are an important target markets for JetSelect.

Major Companies:



Top Private Sector Employers		
Rank	Company	Employees In Region
1	JP Morgan Chase	17,438
2	Nationwide	11,235
3	Honda of America Mfg., Inc.	11,067
4	Kroger Co.	5,417
5	Limited Brands Inc.	5,200
6	Huntington Bancshares Inc.	4,170
7	Cardinal Health Inc.	4,030
8	Medco Health Solutions Inc.	3,831
9	American Electric Power Co.	3,527
10	Whirlpool Corp	3,066

III. Research Methods Used in the Study

A. Description and rationale of research methodologies selected to conduct the research study

Research Goals:

- To gain background information about JetSelect and their customer's loyalty and service needs
- To learn more about the private jet industry
- To learn how to better meet the needs of current or potential private chartering customers so they become more loyal
- To learn about other private jet companies and their customer loyalty and service programs

Secondary Research & Rationale:

To conduct this study, we used both secondary and primary research. Our secondary research included a review of JetSelect's web page, along with online articles about other aviation companies, and a booklet given to us by JetSelect. With the website and booklet JetSelect made available for us, we were able to gain insight about the company and how to make improvements to their current customer loyalty programs.

Other aviation websites allowed us to gain an understanding of how they operate and what they are doing for customer loyalty. The articles we located online also helped us recognize what other companies are doing. Furthermore, we used online articles to grasp what costumers

Secondary Research:

JetSelect Documents

- ❖ JetSelect Aviation overview booklet
- ❖ JetSelect Aviation downloadable articles

Online Articles

- ❖ JetSelect Website at <http://www.jetselectaviation.com>
- ❖ Net Jets Website at <http://www.netjets.com/>
- ❖ Factfinder.census.gov

Research Database

- ❖ CASI

Other

- ❖ Articles from the *Columbus Dispatch*
- ❖ Corporate Jet Insider Blog

are looking for in their selected aviation company. We used Internet research databases for the demographic, geographic, and socioeconomic data for Central Ohio.

Primary Research & Rationale:

Our primary research was used to gain information and further our understanding of JetSelect's business operations.

Business Visit:

This visit included a personal interview with Robert Austin, CEO of JetSelect. Mr. Austin expressed concern with the current lack of a customer loyalty program and challenged us to research and develop a more sufficient program JetSelect could implement. Along with this challenge, Mr. Austin provided us with more insight about the company's procedures with a tour of the facilities including a visit to the storage and maintenance hangar (including the inside of multiple planes), the FBO greeting room, and the command center.

Personal Interviews:

We conducted five other personal interviews in order to learn more about the private aviation industry from a business and customer perspective. We also wanted to learn "best practices" of leading private jet companies. To do this task, we conducted several interviews with Netjets, a nationally recognized private jet company. These interviews helped us learn a great deal about customer service and loyalty.

Primary Research:

Business Visit

- ❖ **JetSelect Headquarters**
- ❖ **Netjets Headquarters**

Personal Interviews

- ❖ Mr. Robert Austin, CEO JetSelect
- ❖ Mr. Jeremy Bogle, Executive Vice President, JetSelect
- ❖ Mr. Nathan Batty, Director of Charter Operations and Safety, JetSelect
- ❖ Mr. Herbert Glimcher, Private Jet Costumer, Netjets
- ❖ Ms. Meagan Laue, Customer Service Department, Netjets
- ❖ Mr. Brad Ebersole, Private Jet Costumer, JetSelect
- ❖ Ms. Jan Sliva, Director Travel Operations, AAA Ohio Auto
- ❖ Ms. Stephanie Stewart, Product Development Specialist, Netjets

Interview #1 Mr. Robert Austin, Chief Executive Office, JetSelect Aviation

Rationale:

- To gain background information about JetSelect Aviation and their customer service needs
- To explain and clarify research problems for customer service
- To gain permission to conduct customer service research

Interview #2 Mr. Jeremy Bogle, Executive Vice President, JetSelect Aviation

Rationale:

- To gain more knowledge about JetSelect, more specifically focused on the customer experience (cleanliness of planes, safety records, catering, etc.)
- To obtain advice on how to improve the overall customer experience once they arrive at the FBO

Interview #3 Mr. Nathan Batty, Director of Charter Operations and Safety, JetSelect Aviation

Rationale:

- To explain the importance of safety in private aviation
- To explain scheduling of flights and necessary service to planes
- To further explain bookings of flights and first interaction with customers

Interview #4 Mr. Herbert Glimcher, Private Jet Customer, Netjets Aviation

Rationale:

- To better understand the experience from customer perspective
- To learn more about NetJets from customer perspective (market-leader and competitor to JetSelect Aviation)

Interview #5 Ms. Meagan Laue, Customer Service Department, Netjets Aviation

Rationale:

- To learn more about customer service techniques used by Netjets
- To view and tour Netjet's facilities
- To learn more about current customer loyalty program

Interview #6 Mr. Brad Ebersole, Private Jet Customer, JetSelect Aviation

Rationale:

- To learn more about the JetSelect experience from a customer perspective
- To locate areas of possible improvement for customer loyalty
- To find any other areas that may need improvement

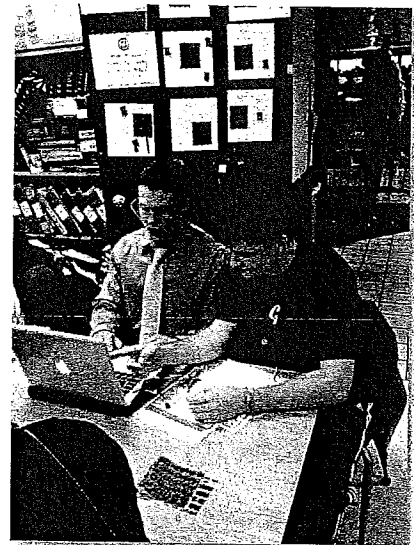
Interview #7 Ms. Stephanie Stewart, Product Development Specialist, NetJets

Rationale:

- To learn about Netjets' customer reward program
- To learn about customer satisfaction in private aviation

B. Process of conducting the selected research methods

Personal Interviews: Before we went into our interviews, we researched the private jet business in order to better prepare the questions and be more aware of the terminology used. We began our interview process by creating questions that we thought would help us to gather the best information for our research. After we developed these questions, we then would schedule an interview with a phone call. Often times, we would schedule a personal interview, but we also set up phone interviews. Along with the pre-made questions, we gave a brief overview of our project to allow for them to give us more insightful answers.



*Sean Moser and Cole Griesinger
preparing questions for an
interview*

In order to obtain the most information, we interviewed multiple people involved in the private aviation business. The questions that were asked varied based on who we were talking to and what information we were attempting to gain from each person. The objectives of each interview are listed below.

Interview #1 Mr. Robert Austin, Chief Executive Office, JetSelect Aviation

Research Technique: We scheduled the initial meeting via a phone call. At this meeting, we discussed the background of JetSelect and learned more about the private aviation business. Along with learning about how the company is run, we also toured the facilities, which included tour of select jets. Any questions after the interview were discussed via Email.

Sample Questions

- Who are JetSelect's major competitors in the Columbus area?
- What do you consider a "loyal" customer?
- How many clients currently fly JetSelect?

Interview #2 Mr. Jeremy Bogle, Executive Vice President, JetSelect Aviation

Research Technique: We met with Mr. Bogle at the JetSelect facilities for a personal interview.

We had premade questions for Mr. Bogle. The questions often lead to other questions which allowed us to gain a full grasp of the subject. The touring of the jets were particularly important as the point of the meeting with Mr. Bogle was mainly focused on the upkeep of the jets. Other questions were asked via Email.



Jeremy Bogle, Executive Vice President, JetSelect Aviation

Sample Questions:

- What must be done to ensure the plane is kept to the highest standards?
- What are common request from customers?
- Are there any safety measures that interfere with the convenience of flying privately?



JetSelect's midsize jet

Interview #3 Mr. Nathan Batty, Director of Charter Operations and Safety, JetSelect Aviation

Research Technique: We met with Mr. Batty at the JetSelect facilities for the personal interview. We had pre-made questions that often led to other questions. The main focus of this meeting was to discuss the importance of plane safety. Along with the plane safety, we spoke with Mr. Batty about the booking process and customer interaction throughout the flight. Other questions were asked via Email.

Sample Questions:

- What happens when someone wants to book a flight with Jetselect?
- What are some common requests asked from customers while on-board?

Interview #4 Mr. Herbert Glimcher, Private Jet Costumer, Netjets Aviation

Research Techniques: We met with Mr. Glimcher at his office in Columbus. We had pre-made questions for Mr. Glimcher to answer. The meeting lasted nearly two hours, which allowed us to gain a further understanding of private flying from the costumer's perception.



*Herbert Glimcher, Private
Jet Costumer, Netjets*

Sample Questions:

- What separates Netjets from other companies in your opinion?
- Why fly private?
- How important is price when it comes to making the decision concerning which company to fly?

**Interview #5 Ms. Meagan Laue, Customer Service Department,
Netjets Aviation**

Research Technique: We started with a phone interview and pre-made questions. We then followed that interview with a tour of the Netjets'



*Megan Laue, Customer
Service Department,
Netjets*

facilities. While on the tour, we asked questions and took notes. After the meeting, we had multiple follow-up phone calls.

Sample Questions:

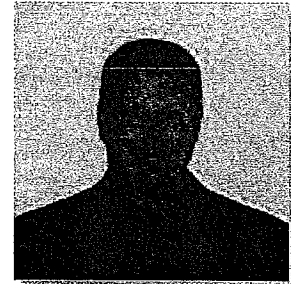
- What does Netjets do behind the scenes to make them the best?
- What does Netjets do on peak (heavy-traffic) days?
- How is catering done?
- Is Netjets looking into the chartering market at all?

Interview #6 Mr. Brad Ebersole, Private Jet Costumer, JetSelect Aviation

Research Technique: We acquired Mr. Ebersole's Email from Mr. Austin (CEO of Jetselect). We spoke with Mr.Ebersole via Email. We sent pre-made questions in order to understand JetSelect better from the costumer's point-of-view. After he answered our questions, we sent him a thank you Email.

Sample questions:

- Would you recommend JetSelect to a friend?
- What do you like about JetSelect? What could be improved?
- Would a customer rewards program entice you to fly with JetSelect more frequently?



*Brad Ebersole,
Private Jet Costumer,
JetSelect*

Interview #7 Ms. Stephanie Stewart, Product Development Specialist, NetJets

Research Technique: We first spoke on the phone with Ms. Stewart. She said that she needed to do research on the subject about which we asked. We then decided it would be easier for us to communicate via Email, which is how she ended up answering our questions. We sent a thank you Email when we were done.

Sample Questions:

- Is there currently a rewards program at NetJets?
- If so, how does this program work?
- If so, what are some rewards available?

IV. Findings and Conclusions of the Study

A. Findings of Research Study

For clarity, we have combined the findings and conclusions sections of this study.

B. Conclusions Based on the Findings

Secondary Research

- Our most significant secondary finding was the discovery of the customer loyalty metric called the Net Promoter Score (NPS).
- The NPS uses a ten-point scale for a single question to measure loyalty. This single question is a popular metric used by thousands of businesses to measure customer loyalty.

On a scale from 0-10 how likely are you to refer JetSelect to a friend or colleague?

Not Likely					Neutral					Very Likely
0	1	2	3	4	5	6	7	8	9	10

- The NPS is calculated by adding up the percentage of respondents who give a 9 or 10 referral score and then subtracting the percentage of respondents who give a score from 0 – 6.
- World-class organizations have Net Promoter Scores in the 75% range, and the average score for thousands of organizations across more than 28 industries is 16%.

Conclusion

JetSelect should use this single question to measure loyalty. Past attempts to have clients complete longer surveys have failed. The single question format of the NPS would increase completion rates and provide a proven loyalty metric for JetSelect.

Management of JetSelect

Robert Austin, CEO; Jeremy Bogle, Executive Vice President; Nathan Batty, Director of Charter Operations and Safety

- JetSelect is a private charter airplane operator. Clients pay each-way for a trip, and trips that last multiple days usually cost more than competitors who have fractional-ownership business models.
- The company has never implemented a customer rewards program. Most competitors do have a rewards program.
- JetSelect does not attempt customer satisfaction surveys anymore because they received low completion rates in the past.
- The business has grown their sales the past few years and wants to maintain their customer's loyalty.
- Word-of-mouth and referrals among clients are very important to the business's success.

Conclusion

A new customer loyalty program can help JetSelect attract new customers and keep existing ones happy. This program will result in more repeat business and referrals in order to attract new customers and keep existing customers. The business should also consider a service that is more cost effective to clients who want to have a charter plane available to them for more than a single day. Our plan will address all of these issues.

Interior of one of JetSelect's most popular jets (Lear 60)



Mr. Herbert Glimcher, Private Jet Customer, Netjets

- Netjets is a Warren Buffet owned jet chartering company in Central Ohio that is highly regarded for the flying experience it provides clients.



- Mr. Glimcher is a customer of Netjets and has extensive experience flying private charter. He has also visited JetSelect and is familiar with their planes and base operations.
- Glimcher emphasized the importance of making the flying experience as personal as possible.
- He also reported that in comparison to Netjets, JetSelect's base operations were below standard, including the pre-boarding wait area and the in-flight food.

Conclusion

As a fractional-ownership business, Netjets is not a direct competitor of JetSelect. They are, however, very good at what they do and have a terrific reputation for providing great service. JetSelect can learn from the best. To increase customer satisfaction and loyalty, JetSelect should upgrade their base operation area and in-flight food. Mr. Glimcher stressed that he pays thousands of extra dollars for the added convenience.

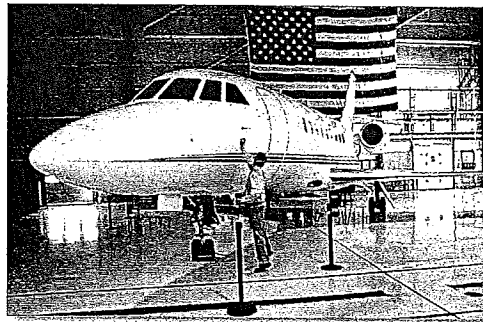
Ms. Meagan Laue, Customer Service Department, Netjets

- Netjets' service philosophy is to do anything possible in order to please the customer. This service includes accommodating clients' needs for their food, rental cars, lodging, and pets.

- Netjet's planes are the best in the business. The interiors of the planes are always being upgraded to make the flight better for the costumers.
- Each person who flies has his/her own account that allows the Netjets employees to increase customer service to him/her.
- Costumers have to pay more to fly Netjets. This price is even steeper on peak periods.
- Wi-Fi can be important to the younger fliers and business savvy costumers. Netjets is currently upgrading their entire fleet to include Wi-Fi.

Conclusion

Netjets has loyal and satisfied customers. They have earned this loyalty through their attention to detail and commitment to meeting a customer's every need. JetSelect can improve their service- and loyalty- by copying some of Netjets' practices. For example,



JetSelect could assign its best customers a personal account representative to make sure reserving a plane is convenient as possible. They can also invest money to upgrade planes with Wi-Fi service. More ideas to improve loyalty will be presented in the next section.

Mr. Brad Ebersole, Private Jet Customer, JetSelect

- Mr. Ebersole stated that JetSelect is not convenient or cost effective for extended trips (three-four days).
- He uses a competing company, Sentient Aviation, for trips lasting more than one day.
- Mr. Ebersole gave high praise for JetSelect's Lear 60 jet.

- Mr. Ebersole indicated the food was very average and needed to be improved.
- He liked the idea of a new customer loyalty program (rewards, special perks, etc.)


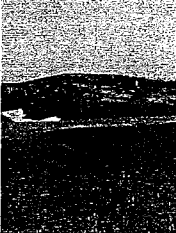
Conclusion

Although Mr. Ebersole is very pleased with JetSelect in general, he gave us certain areas JetSelect could improve. First, he only uses JetSelect for short trips. When Mr. Ebersole is taking a three-four day trip he uses Sentient Aviation. JetSelect is losing customers to other companies because they fail offer a package that allows for intermediate/long trips. Mr. Ebersole also commented that the food on the flights was not up to the standards he expected by saying “I have had them arrange catering in the past but quite frankly it seems to be left up to the crew, and often I could have done better myself with a stop at Subway.” Although he noted these negatives, he said that he is a fan of the Lear 60, which is JetSelect’s most common jet. Along with that remark, he said that if JetSelect offered a rewards program that benefited him, he would be more enticed to fly with them

Ms. Stephanie Stewart, Product Development Specialist, Netjets

- Netjets does not have a costumer rewards program, but provides jaw dropping “owners only perks” to its best customers. Samples of these perks are listed on the diagram below.

Exhibit one

<p>Get on the Court with Roger Federer NetJets owners have spent unforgettable afternoons of fun with Roger Federer – the world's top ranked tennis player. Roger takes to the courts for clinics, returns of serve, and exhibition sets. Locations have included New York City, East Hampton, and Switzerland.</p>	
<p>Golf With Raymond Floyd At Shinnecock Hills NetJets owners enjoyed a day of golf with PGA Tour Professional Raymond Floyd at spectacular Shinnecock Hills Golf Club. The day included a brunch, clinic with Raymond Floyd, round of golf on the prestigious 6,996-yard course, and an awards reception in one of the oldest clubhouses in the United States.</p>	

Conclusion

Netjets does not have a traditional customer rewards program, but does have once in a lifetime experiences it provides its very best customers. JetSelect is a much smaller company than Netjets and cannot afford the expense of these perks, but they can develop special rewards and experiences for their best customers.

V. Proposed Strategic Plan

A. Goals/ Objectives and Rationale

Our findings and conclusions make it clear that JetSelect could implement changes that would improve customer satisfaction and loyalty. This section highlights the objectives of our strategic plan. We have used a chart format to list each objective, planned activity, and rationale. We included both short-term and long-term benefits for JetSelect and what we hope to fix by implementing our plan with the following goals.

Goal 1: Create more customer loyalty by increasing customer satisfaction

Goal 2: Provide value to clients by starting a new loyalty and rewards program

Goal 3: Increase profits and sales

Goal 4: Create a system to measure customer satisfaction

Goal 1. Create more customer loyalty by

increasing customer satisfaction

Improve Food On-board

Short-term benefit:

- Increased guest satisfaction

Long-term benefit:

- Increase in sales and profit

Rationale:

- Interview with Brad Ebersole
- Interview with Herbert Glimcher
- Interview with Meagan Laue
- Based on the personal interviews, we determined that JetSelect is being out-performed by other aviation companies.

Goal 2: Provide value to clients by starting a new loyalty and rewards program

Create a Rewards Program

Short-term benefit:

- Entice fliers

Long-Term benefits:

- Increase profits
- Entice fliers from other private aviation companies

Rationale:

- Interview with Brad Ebersole
- Interview with Meagan Laue
- Based on personal interviews, we determined that a rewards program could help entice people to fly with JetSelect more, therefore increasing profit.

Goal 3: Increase profits and sales

Cell Phone App

Short-term benefit:

- Fast and easy accessibility for booking flights
- Customer Satisfaction

Long-term benefit:

- More bookings, increase in profit

Rationale:

- Personal Interview with, Brad Ebersole
- E-mail from OpenXcell App creator
- Based on the current system in place, this system, would only make it easier for the customer and JetSelect. It is all about convenience

Goal 4: Create a system to measure customer satisfaction

Referral Program

Short-term benefit:

- Recognize pleased costumers without the hassle of a survey

Long-term benefit:

- Increase in new costumers
- Increase in profit
- Increased awareness of JetSelect

Rationale:

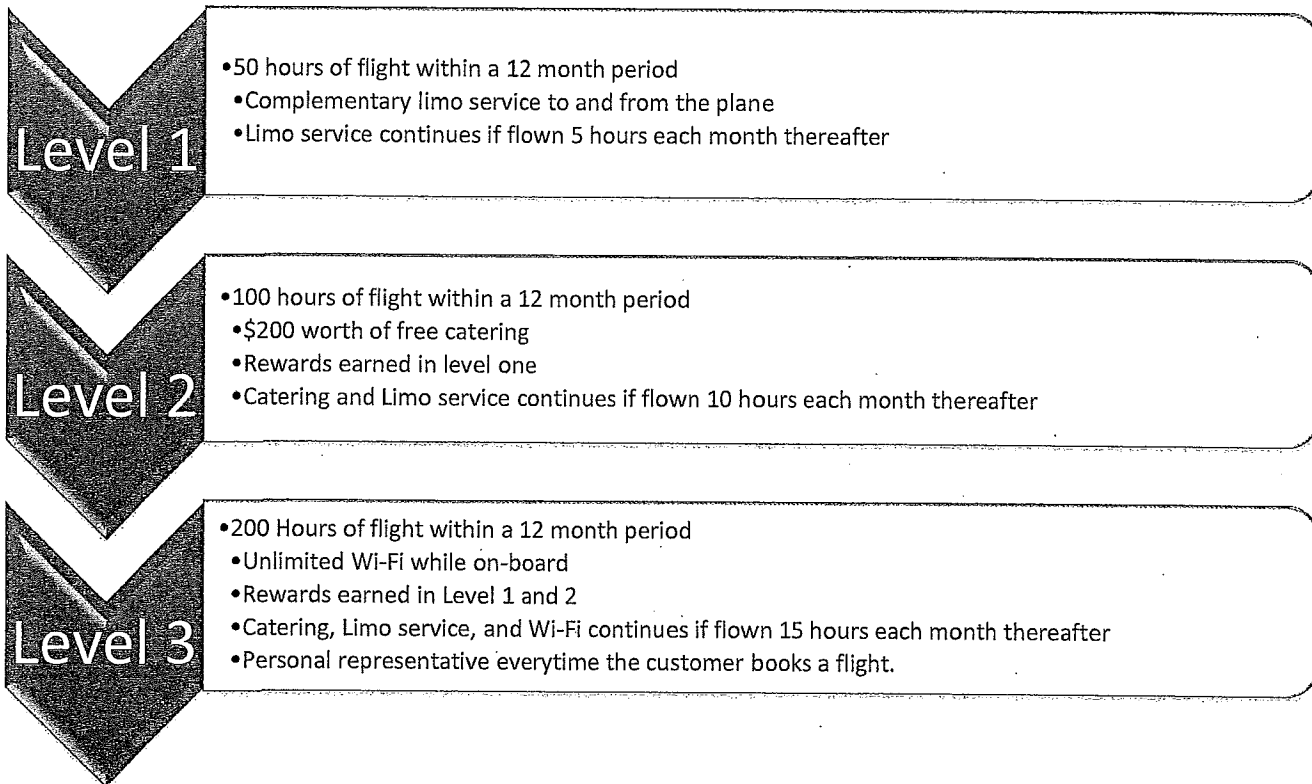
- Personal Interview with Robert Austin
- Personal Interview with Jeremy Bogle
- From the interviews, it was discovered that customer satisfaction surveys are rarely filled out due to the hassle. This is an easy way to gauge which costumers are happy. Clients are also often acquired from current customer recommendations which could increase profits.

B. Proposed Activities and Timelines

This section provides activities and timelines to improve JetSelect's customer satisfaction.

Implementing these activities will result in more loyal customers and higher sales and profits.

1. Start a Rewards Program



We want to reward people who consistently bring their flying needs back to Jetselect.

Along with rewarding the best costumers, it may entice people who do not use JetSelect every time for their travel needs. JetSelect can gain an upper edge on the competition with the creation of this plan. Our proposed plan will reward clients for reaching three different levels of usage. To make sure this program would be realistic, we consulted with members of JetSelect's marketing team. Below is the proposed rewards plan.

2. Improve In-Flight Catering

Our research findings indicated in-flight food quality was very important in the private aviation business. Large private aviation companies will set up contracts with premier catering companies throughout the United States to ensure the food meets high standards. A smaller company like Jetselect does not have such resources. They instead have the captains of each plane select what will be served for the flight. In our interviews, we found that customers are not happy with the food being served on JetSelect's flights. In order to increase the customer satisfaction, we propose that a guide is created that exhibits strict guidelines for what can be served and how it must be served.

Competitors have food standards guides between 30 and 50 pages. Due to the complexity, we suggest hiring a professional restaurant consultant to help design the guide. If the businesses follow these guidelines, Jetselect will be able to match the food quality of the industry leader, Netjets. Below is an example of a private jet food quality guide found online:

Appetizer Trays
(Crackers Tray)

- Minimum of four cheeses (at least one from each category)
- No cheeses with strong odors (unless requested)
- Cheeses should be labeled
- Crackers are always separate from cheese (separate tray)
- No less than eight crackers per person

Soft Cheeses

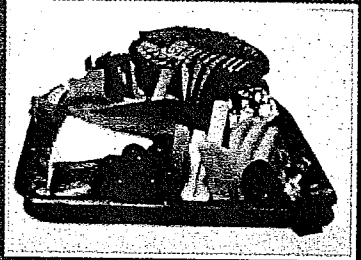
- American
- French Brie
- Chevre

Simi-Hard Cheeses

- Cabrales
- Cheddar
- Colby
- Edam
- Gouda

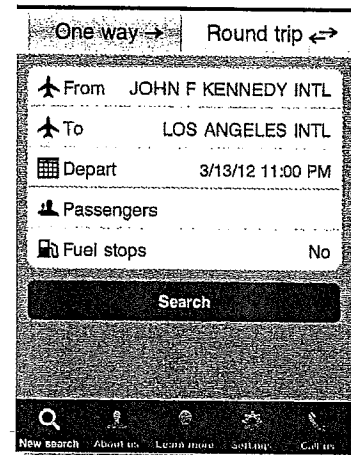
Hard Cheeses

- Blue Cheshire
- Comte
- Gorgonzola
- Provolone
- Roquefort



3. Launch a Mobile Phone Application

Our research revealed that the main reason people pay thousands to fly privately is for the convenience. Everything from loading luggage to customs is more convenient when flying privately. The booking process needs to be equally convenient for the customer. Most people who are flying privately have a smart phone. We are proposing that JetSelect invests in a smart phone application to help increase the convenience of booking. This app will allow customers to quickly book flights without the hassle of making a phone call.



Example of booking screen on mobile App (iOS)

1. Creator: The app will be made with OpenXcell App creator. OpenXcell is known for their ability to make complex apps into simple, user-friendly interfaces. This, along with their guaranteed acceptance into the Apple App Store ensures that JetSelect's App will be convenient and easy to use. OpenXcell will be able to create the app for multiple platforms including iOS (Apple), Android, and Blackberry OS.

2. Purpose: The application will have many uses, but the main purpose of the app is to allow customers to quickly and simply book a flight with a few touches. Customers will be able

to specify the departure and arrival time, number of passengers, arriving and departing airport, and type of plane requested.

JetSelect would have this app integrated into their online booking process to allow ease with retrieval of the information. Due to the

fluctuating cost of fuel, there is no set price on a flight, so costumers could expect a text within 30 minutes with a quote for flight. From the text, they would be able to accept or decline the offer.

Cost of App Development

IPhone/iPad App- \$2400

BlackBerry App- \$2900

Android - \$2400

3. Awareness: Part of the success with this app is making sure that JetSelect customers know that the app exists. To ensure this awareness happens, it is suggested that every plane has small brochures advertising that the new apps are available. In addition to the brochure, it is recommended to post a link on JetSelect's website that gives more details about the app instructions for downloading.



Example of On-Board Brochure

4. Begin a Referral Program

To encourage customer referrals, JetSelect should provide current customers an incentive to refer friends and colleagues. This example shows how the program would work.

Whenever someone new calls to book a flight (or when JetSelect calls back if booking online), the JetSelect dispatcher would ask if the person was referred to the company by an existing customer. If the answer is "yes", then this information would be entered into the current customer's profile within JetSelect's current database. Over the next 12 months, if the person acquires 1 to 2 referrals, they will earn 2 percent off their flights for the next 12 months (50 hour maximum per 12 months). If they refer 3 to 4 new clients in 12 months, they will earn 4 percent off their flights for the next 12 months (50 hour max per 12 months). Lastly, if they refer 5 or

	Price with no referrals, one way	Price with 1-2 referral(s), one way (2%)	Price with 3-4 referrals, one way (4%)	Price with 5+ referrals, one way (5%)
500 miles (New York City)	\$7,000	\$6,860	\$6,720	\$6,650
1000 miles (Denver)	\$14,000	\$13,720	\$13,440	\$13,300
2000 Miles (Los Angeles)	\$21,000	\$20,580	\$20,160	\$19,950

more new clients in 12 months, they receive 5 percent off for the next 12 months (50 hour max per 12 months). In order to gain the discount, the new client (referral) must fly at least 10 hours with JetSelect before the current customer receives the discount.

We learned from the personal interviews that often times clients will select a company with which to fly based on their friends recommendations.

This program will encourage current clients to refer JetSelect and help the company gain more customers and profits. We chose two, four, and five percent because they are significant enough to entice someone to refer

JetSelect to a peer, yet not significant enough to eliminate profit made from each flight.

1-2 referrals in 12 months	2% off for 12 months
3-4 referrals in 12 months	4% off for 12 months
5+ referrals in 12 months	5% off for 12 months

5. Wi-Fi Update

JetSelect is in the process of installing Wi-Fi and we suggest that they continue to complete this task. Our findings show that clients are willing to pay the extra money in order to have this luxury

6. Measure Customer Satisfactions and Loyalty

Improving customer satisfaction and loyalty should be a goal of every JetSelect employee. According to the Harvard Business Review, the Net Promoter Score is the best indicator of loyalty. Because calculating the Net Promoter Score only involves asking one question, the response rate is normally very high. JetSelect should shoot for a score over 70%. This is the score range of world-class service companies.

The question should be asked of every customer just prior to landing, and results should be tallied and posted quarterly. Making the Net Promoter Score an important metric for the company will result in more loyalty, more referrals, and more sales.

On a scale from 0-10 how likely are you to refer JetSelect to a friend or colleague?

Not Likely					Neutral					Very Likely
0	1	2	3	4	5	6	7	8	9	10

Proposed Calendar:

Calendar (2012-2013)	July	August	September	October	July (2013)
Implement Rewards Program	Set up system to ensure proper tracking of rewards and flights	Begin tracking customer rewards plan	Create brochures to advertise new customer loyalty plan	Continue to monitor loyalty program	First month that incentives will begin to be rewarded
Implement Catering Standards Guide	Have executive meeting on what the standards of catering should be	After all members have agreed on standards, begin to put together a guide explaining in detail	Distribute PDF catering guide so suppliers can become familiar with standards	Review catering with employees (pilots and flight attendants)	Interview employees and current customers to review quality and satisfaction
Launch Smart Phone App	Submit the layout for the app.	Explore application and work out any concerns with OpenXcell.	Open application to focus group for testing	App will be completed and distributed to customers	Meet with customers to discuss concerns with app
Create Referral Program	Train employees to track and record referrals	Email customers of new referral program	Begin use of referral program. Continue to inform clients.	Start to reward customers based on referrals	Meet with customers and discuss concerns

C. Proposed Budget

The reward program, catering standards guide, and referral program will be tested nationwide by all customers. The smart phone app will be tested with a small focus group for a month before launching to all customers. The proposed budget is for a one-year time period. All costs of the plan are as follows:

Reward Program:

The first reward stage requires renting a stretch limo, which costs \$30 an hour when rented from Columbus Limo Service. It will be necessary to rent the limo for two hours (one hour for drive from home to airport, one hour drive from airport to home), meaning that in total, it will cost \$60

per flight. In order to gain, the complementary limo service, the customer will need to fly an average of 4 hours and 15 minutes a month for a 12 month period, generating approximately \$35,000 revenue per month for JetSelect. This revenue easily covers

the \$60 for the limo service to and from the flight. The second reward stage includes the limo service along with \$200 in free



Stretch limo from Columbus Limo Service

catering. JetSelect will invest \$260 per flight. In order to gain this

reward, a person will have to fly an average of 8 hours and 30 minutes

per month during a 12 month period, generating approximately \$70,000 revenue per month for

JetSelect. The third and final stage of the rewards package includes unlimited Wi-Fi, along with

the rewards from stage 1 and 2. Unlimited Wi-Fi is valued at \$2000 per flight, along with the

\$260 being invested on the limo and catering. This cost a total of \$2260 per flight, but this is

offset by the average 16 hours and 45 minutes flown per month for 12 months, which gains

approximately \$140,000 revenue.

Reward Program	Average hours flown (per month)	Revenue (per month)	Cost to JetSelect (per month)
Stage 1	4.2 Hours	35,000	\$60
Stage 2	8.5 Hours	70,000	\$260
Stage 3	16.7 Hours	140,000	\$2,260

Catering Standards Guide: The cost will be minimal for creating this Catering Standards Guide. To help eliminate cost of printing, it will be posted as a PDF file. The pilots and catering company will have access to this file anywhere, which will help ensure that standards are upheld. The expenses are going to accumulate from paying a professional restaurant consult (i.e.

Cameron Mitchell Catering). This consultant will cost approximately \$500 due to the complexity of the guide.

Smart Phone Application:

The proposed smart phone app will be available on Apple, Android, and Blackberry platforms. The creation of the app on each platform will cost a separate amount. The creation of the app for iOS (apple) cost \$2400. This also includes guaranteed acceptance into the Apple App Store. The Android app will also cost \$2400 to create. Lastly, the Blackberry app costs \$2900 to create. All of the platforms will be programed by OpenXcell to automatically be sent to JetSelect’s dispatchers. In total, the creation of the three apps will cost \$7700.

Apple	\$2400
Android	\$2400
Blackberry	\$2900
Total Price:	\$7700

Referral Program:

The only expense for the referral program would be the amount of money taken off the current costumers’ bills for the flight the next 12 months. Although this expense will cut into the profit of JetSelect, the profits from the referred customers will cover the loss. In order to ensure a profit is still made, we suggest the client receives a discount for a maximum of 50 hours per year.

Referral Program	Expense 1.5 hr - 50hr	Revenue
1-2 Referrals	\$140 - \$28,000	\$52,000 – \$105,000
3-4 Referrals	\$280 – \$56,000	\$157,500 – \$210,000
5+ Referrals	\$350 - \$70,000	\$262,500+

The diagram above shows the expense and revenue from current clients of JetSelect. 1.5 hours was determined to be the absolute minimum someone could fly in a 12-month period. We set 50 hours as the maximum amount someone can fly and receive the referral discount.

D. Proposed Metrics to Measure Return on Investment

Net Promoter Score – The Net Promoter Score is a proven metric that JetSelect should use to measure customer loyalty. World-class service organizations receive NPS scores above 70%. We believe this is the standard JetSelect should aspire towards. The NPS score should be tallied every quarter and displayed prominently for every employee to view. Some leading companies are now tying employee bonuses to this metric.

Net Promoter Score	
70% >	Excellent
51% - 69%	Great
21% - 50%	Good
20% <	Poor

Referrals – As JetSelect's level of customer satisfaction increases, so should the number of client referrals the business receives. We recommend asking each new client how he/ she heard of JetSelect to track the number of referrals. This number could be placed next to the Net Promoter Score for all employees to see.

Sales Metrics	
10% >	Excellent
8% - 10%	Great
5% - 7%	Good
5% <	Poor

Sales – The most important metric to measure success will be company sales. Our plan will lead to more satisfied customers, who fly more frequently, and refer more new clients. The accompanying chart lists conservative sales metrics JetSelect could use to measure the success of this strategic plan.

VI. Bibliography

Consultants:

- Kit Lynch. Marketing Education Teacher at Gahanna Lincoln High School.
- Robert Austin. CEO of JetSelect
- Becky Rice. English Teacher and Gifted Coordinated at Gahanna Lincoln High School

Personal Interview:

- Robert Austin. CEO. JetSelect Aviation. Columbus, Ohio.
- Jeremy Bogle. Executive Vice President. JetSelect Aviation. Columbus, Ohio
- Nathan Batty. Director of Charter Operations and Safety. JetSelect Aviation. Columbus Ohio
- Herbert Glimcher. Private Jet Costumer. Netjets Aviation. Columbus, Ohio
- Meagan Laue. Customer Service Department. Netjets Aviation. Columbus, Ohio
- Mr. Brad Ebersole. Private Jet Costumer. JetSelect Aviation. Columbus, Ohio
- Jan Sliva. Director Travel Operations. AAA Ohio Auto Club. Columbus, Ohio
- Stephanie Stewart. Product Development Specialist. NetJets. Columbus, Ohio

Internet Sites:

- www.jetselectaviation.com
- www.netjets.com
- www.quickfact.census.gov
- www.privatejets.com
- www.deltaprivatejets.com
- www.laneaviation.com
- www.bluestarjets.com

2013 INTERNATIONAL CAREER DEVELOPMENT CONFERENCE

WRITTEN EVENT WINNERS



BUSINESS SERVICES OPERATIONS RESEARCH EVENT

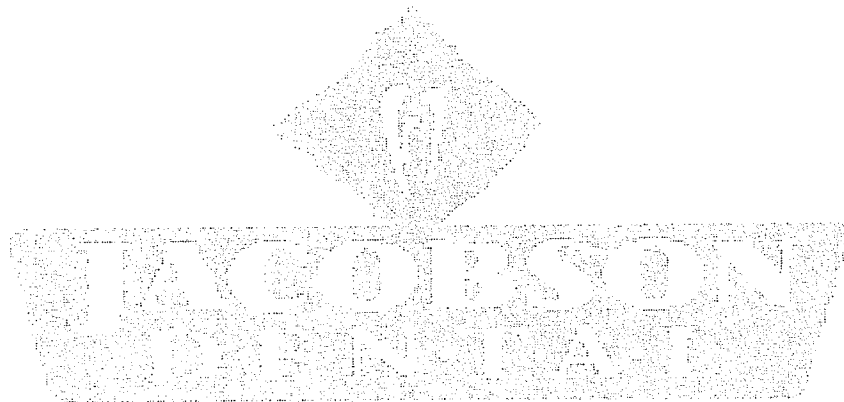
1st Place
Elizabeth Gogolin
Ashli Callaway
Holmen High School, WI



BUSINESS SERVICES OPERATIONS RESEARCH EVENT

Holmen DECA Chapter

Holmen High School
1001 McHugh Road
Holmen, WI 54636



Ashli Callaway and Elizabeth Gogolin

January 24, 2013

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I. EXECUTIVE SUMMARY

A business's website is a baseline for marketing, promoting, and expanding the company. With the latest technologies, social media sites have become very popular, and we have come up with ways for Jacobson Dental to expand their business by implementing simple. Based on our research, we have formulated a strategic plan that will ultimately allow for new opportunities for Jacobson Dental.

Research Methods: In our project, we used several different research methods including primary and secondary research to conduct and come up with a new look for the Jacobson Dental website. We felt it was necessary to survey customers at Jacobson Dental because feedback from patients would be most beneficial in identifying their concern. Also, we held a personal interview with Dr. Jacobson, selected a focus group, held several competitor interviews, and gained knowledge from the Vice President for Interactive Media at Altra Federal Credit Union.

Research Findings: Throughout our research we have come up with several new ideas for Jacobson Dental to implement throughout their business. We set goals for social media sites which grows the consumer base and creates opportunity for business growth. In addition, we wanted to expand customer knowledge of the website, by updating the look, and using promotions to drive customers to the site. We also used a SWOT analysis to identify strengths, weaknesses, and opportunities and threats of the Jacobson Dental website. Below is a preview of the SWOT analysis:

Strengths	Weaknesses	Opportunities	Threats
-Easy to follow layout	-Lack of promotions	-Google Analytics	-Lack of social media
-Organizational pull tabs	-Photo update	-Customer incentives	-Contact information
-Slogan	-Marketing techniques	-Target market	-Clients unaware

Strategic Plan: The strategic plan is spread out over the course of two weeks to create the social media sites to expand the communication levels of the business. In addition, we set a two month goal of mapping out a new website for Jacobson Dental. We want to have a fresh new website within two months after getting the approval by Dr. Jacobson. We will hopefully launch the new website in June of 2013. In addition to fixing up the website, we also want to focus on three other goals:

1. Creating promotions that can be done through social media sites.
2. Getting 500 likes within 3 months of creating the Facebook page
3. Implementing 'Model your Smile' photo contest each year

Activities: The activities associated with our strategic plan include the use of social media websites like Facebook and Twitter. In addition to the revisions that will be done to the Jacobson Dental website, there will be several monthly incentives on the website.

Budget: The project costs for all of the improvements of the website were accounted for in a detailed budget totaling of \$2,490. We find this cost exceptionally low because most of the ideas we decided to implement were free, but gain costumers in the long run.

Evaluation: We are confident that this strategic plan will help Jacobson Dental increase sales and gain new long term customers. We want the communication among the patients to be strong through social media sites, and promotions held in the office. Tracking the ROI of our strategic plan will be done through social media sites, promotions, and new customers.

II. INTRODUCTION

A. Description of the business or organization



Jacobson Dental is a Sole Proprietorship owned and operated by Dr. Connie Jacobson. She purchased the office in a suburban area in the small town of West Salem, Wisconsin from Dr. David Scott in 1994. Additionally, she's been in dentistry since 1989, and she graduated from Marquette University School of Dentistry where she received her Doctorate of Dental Surgery degree. Also, she is very actively involved in the La Crosse area and with out of state dental

organizations. In the Coulee Region, it is not an uncommon occurrence to turn on the radio and hear their catchy tune, *"Jacobson Dental, we've got your smile."* Jacobson Dental specializes in dentures, crowns, braces, cosmetic dentistry, Invisalign, and teeth cleaning. Furthermore, Dr. Jacobson has advanced training and courses from: Las Vegas Institute for Advanced Dental Studies, Advanced Functional Aesthetics Program, Straight Wire Orthodontics, Studies in Orthodontics, and Neuromuscular Dentistry. The dental office has a total of 6 employees helping with daily operations, including a financial coordinator, 3 hygienists, and 2 dental assistants,

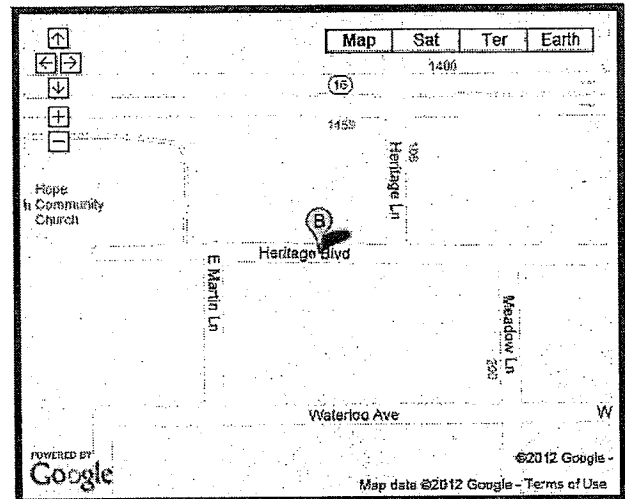
Dr. Jacobson's patients travel from all parts of La Crosse County to receive a unique dental experience.

Jacobson Dental is located at 1529 Heritage Boulevard, right off Highway 16 in West Salem. Dr. Jacobson's

business is continually growing, and the majority of Dr. Jacobson's customers come from the La Crosse area.

Jacobson Dental is surrounded by several other businesses and is located in a family friendly neighborhood.

The office space consists of a total of 16,000 square feet with a total of 6 rooms, filled with advanced



technologies for dental care. Interestingly, the office space at Jacobson Dental has not been updated since 1998, yet it has been kept in excellent condition over the years. All of the equipment, however, is state of the art and updated yearly. These advances provide Dr. Jacobson with an overall edge to patients care, with the utmost quality.

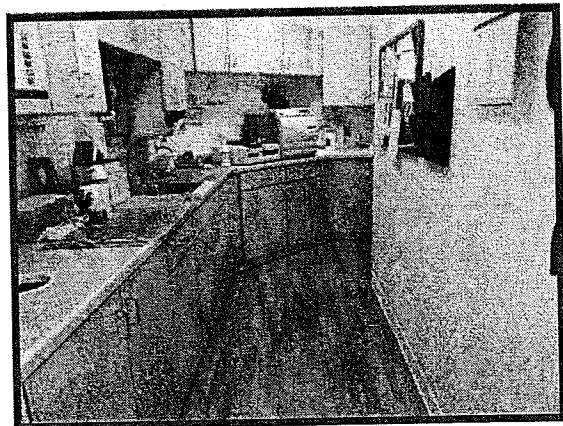
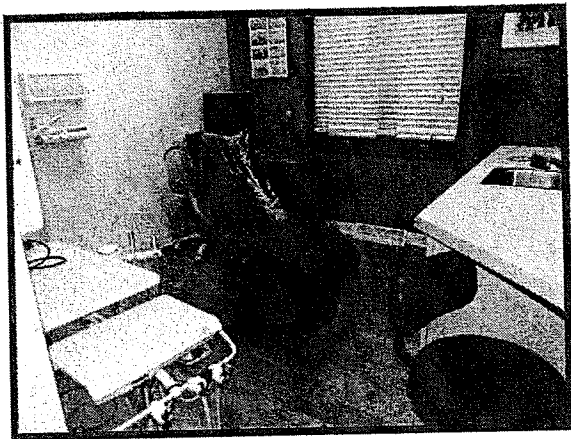
On average Jacobson Dental sees at least 16 to 20 customers a day, and every employee works hard to promote an atmosphere where it is all about the patient. When entering the waiting room, customers are greeted by a friendly receptionist, a warm environment, and refreshments are offered. Also, the waiting room is inviting to small children with an area filled with toys, a TV to watch movies, and a PlayStation with games. Her office is very kid friendly, and after every cleaning, children are provided with a "goody bag" full of hygiene supplies. Children are also allowed to pick a surprise out of a toy chest after the cleaning as well.



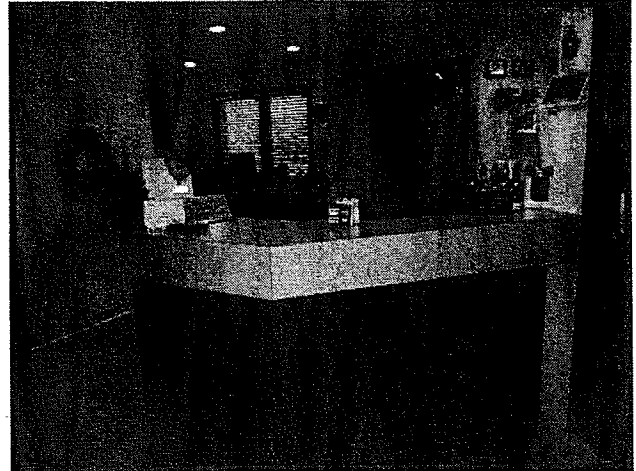
Jacobson Dental is open Monday through Friday with varying business hours, allowing for flexibility among customers. Dr. Jacobson is open later some nights for people getting off work late, and she is always willing to take new patients. Below is a chart that shows the business hours of Jacobson Dental Monday through Friday.

Jacobson Dental Business Hours:				
Monday	Tuesday	Wednesday	Thursday	Friday
8am- 6pm	8am-4pm	7am-4pm	8am-5pm	8am-12pm

Furthermore, Jacobson Dental takes great pride in their unique one-on-one customer care. In fact, Dr. Jacobson says she spends more time with her patients to build and ensure a strong relationship with them. She also strongly believes in the "golden rule" when it comes to patients, which is "treating them how she would like to be treated," when it comes to dental care. In addition, she strives for quality work. This results in happy and healthy patients in return. Dr. Jacobson is one of the few dentists in the area that spends more time with her patients and gets to know them personally. Instead of rushing through her work, Dr. Jacobson takes pride in the amount of time spent making sure every patient is receiving the "golden rule" treatment. Her work is superior, and she never leaves a patient unhappy.



Jacobson Dental strives to reach its full potential by helping each and every patient who walks through the door. Dr. Jacobson's target market is those in the age range from 35 to 55. The reason her target market may be directed at an older age group, is because due to the amount of people in that group who are starting to need more work done with their teeth. Dr. Jacobson sees patients as young as three years old and continues to see patients as they age. Jacobson Dental uses a vast variety of technologies and advancements on these patients to ensure the utmost quality of work. Subsequently, computers are a very important tool at Jacobson Dental; they're used for scheduling, viewing x-rays, pictures, and for performing operations. Jacobson Dental offers excellent care, and we want their work to be as strong as their new website.



B. Overview of the business's current website structure, capabilities, offerings, etc.

The Jacobson Dental website is quite up-to-date, but some changes need to be made in order for Dr. Connie Jacobson and her staff to succeed among their competitors. The website is very easy to find on any search engine, or it can be easily accessed by typing in www.jacobsondental.com. The overall layout of the website is very simple to use, but there is room for improvement. In addition, the photos on the website consist of models, but it would be more beneficial to use pictures of people that Jacobson Dental has actually worked with. These photos look as though they were selected randomly off the internet in an effort to supply more photos to the site. We strongly believe that seeing smiles/photos of patients from the La Crosse area who received work on their teeth from Jacobson Dental, they will show other patients they can get successful results too.

In addition, the business address and contact information are located on the bottom left hand corner, but it should be adjusted and moved to the top of the site. This is essential because it directs people to their business, and it needs to be in an easy spot for customers to find on the website. When first visiting Jacobson Dental's site, it's easy to feel at ease with its calming colors and subtle background layout. There are no distractions on the site, and the font is very easy to understand and read. The website is simple to follow and

very inviting. The website promotes a wonderful atmosphere that Jacobson Dental has to offer, and with a few improvements, the business will become more successful.

Furthermore, Jacobson Dental offers a feature on their website where they allow patients to request an appointment based on the availability provided on the website (refer to figure 1). After the patient submits their entry, they will receive a call from the office as soon as possible. This is a great way for busy patients who do not always get a chance to call the office during open hours. This is a feature we find needs some improvements that will enhance the overall look, and make it effortless for customers to be proactive about their dental care.

Also, we believe Jacobson should look into providing more online options like: paying bills online, setting up social media sites, and allowing customers to stay more in touch with their dental care through a My Care Page. Jacobson Dental is all about customer satisfaction, and by touching up their website, this will allow for a successful business. More importantly, it's important they target every customer in the La Crosse and surrounding areas.

Appointment Request

The first step towards a beautiful, healthy smile is to schedule an appointment. Please contact our office by phone or complete the appointment request form below. Our scheduling coordinator will contact you to confirm your appointment.

Please do not use this form to cancel or change an existing appointment.

*Items in bold are required.

Name:	<input type="text"/>	Are you a current patient?
Address:	<input type="text"/>	<input checked="" type="radio"/> Yes <input type="radio"/> No
City:	<input type="text"/>	
State/Province:	<input type="text"/>	
Zip/Postal:	<input type="text"/>	
Email:	<input type="text"/>	Best time(s) to call?
Phone:	<input type="text"/>	<input type="checkbox"/> Morning <input type="checkbox"/> Noon <input type="checkbox"/> Afternoon <input type="checkbox"/> Evening

Preferred day(s) of the week for an appointment?

Any Day MON TUE WED THUR FRI

Preferred time(s) for an appointment?

Any Time Morning Noon Afternoon Evening

Contact us!

We encourage you to contact us with any questions or comments you may have. Please call our office or use the quick contact form below.

Name:

Phone:

Email:

Type your message here: (Messages sent using this form are not considered private. Avoid sending confidential information via email.)

Figure 1: Screen shot of the Jacobson Dental appointment creator

III. RESEARCH METHODS USED IN THE SWOT ANALYSIS

A. Steps taken to design the study and the instrument

After covering a broad-spectrum of information about Jacobson Dental, we conducted some additional in-depth research. We used primary and secondary research to collect information; the sources we used were Dr. Jacobson, her staff, customers, community members, and other local dentist offices.

Personal Interview with Dr. Connie Jacobson: In addition to visiting these sites, we chose to have a personal interview with Dr. Jacobson. (The questions from the interview are located in the appendix on page 27.) During our interview, we were able to better understand and gain background information about the businesses history, hours, and marketing strategies. Dr. Jacobson also provided us with information on the daily operations of the business, and information regarding the website.

Customer Survey: Also, we conducted a customer survey to gain responses and an overall perspective on the business. We created a survey, and with the help from the employees, we were able to successfully distribute it. Overall, we surveyed one hundred customers at the business; the responses on their surveys provided us with the customers' perspective of the website, their overall satisfaction of the service provided, and the demographics of the patients. A sample survey is located in the appendix on page 25.

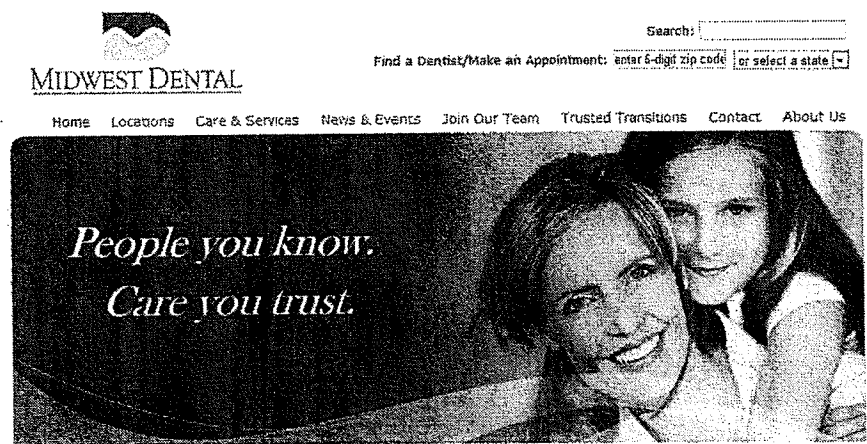
Focus group: Furthermore, we gained knowledge from the aspects of non-customers of Jacobson Dental to better our knowledge on how to construct an overall quality website. We created a focus group which consisted of students from a marketing and business class at Holmen High School. We were able to question the overall satisfaction of the website. The demographics of our focus group consisted of students because they are high-tech and critical. Also, we find the students will give the website a fresh look. Thirty business and marketing students at Holmen High School were given a short survey which allowed us to gain their likes and dislikes of the layout, graphics, and the user friendliness of Jacobson Dental's website.

Competitor Interview: In addition, we set up competitor interviews with 8 other dental offices in the surrounding area to gain further knowledge on updating the Jacobson Dental website. Interviewing these businesses helped us understand the similarities and differences between the competitors and Jacobson Dental. The main focus of the interviews was to find social media sites they used, and how they advertise their website. These interviews were completed by a short answer survey distributed by us to the businesses in order to receive their feedback. A sample of the competitor interview is located on page 24 in the appendix.

Presentation by Carol Neill: Carol Neill is the Vice President for Interactive Media at Altra Federal Credit Union, a local bank with a branch located in our school. Carol Neill presented a PowerPoint on how to evaluate a website better. She focused on looking at the design, purpose, and its overall content. Carol provided us with beneficial information on how to make Jacobson Dental's site the best it can be.

Internet resources: To fully gain more information and further our understanding about the field of dentistry in the La Crosse area, we used the internet as a valid resource. We visited our target website, Jacobson Dental, as well as the websites from other local competitors to compare and contrast the businesses. The competitors' sites we visited include: Bentz Orthodontics, Midwest Dental, River Valley Dental, Cowgill Dental, Dental Clinic of Onalaska, Hulse Dental, and Maplewood Dental. As a secondary form of research, we were able to gain information by using these sites to provide us with some knowledge of how to improve Jacobson Dental's website.

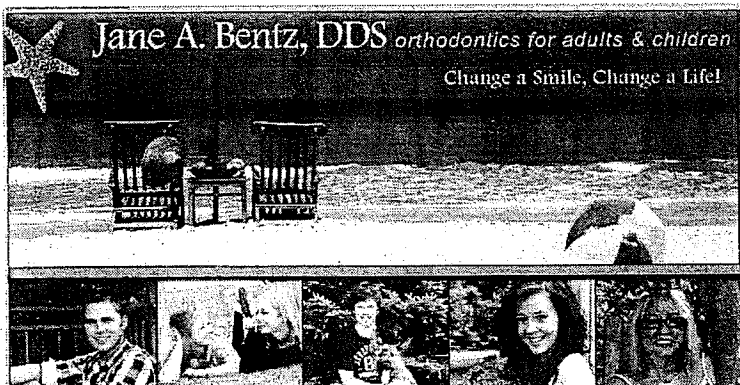
To the right, is the Midwest Dental home page. Our focus group liked how they incorporated a search box in the right hand corner. This allows customers to easily access information.



B. Steps taken to conduct the study

After conducting all of our research, we combined the data we gathered and were able to create a list of improvements Jacobson Dental needed to make to ensure a successful and satisfactory website for its future and current customers.

Internet Sources: In an attempt to find and retrieve information on concepts Jacobson Dental's website may adapt, we reviewed sites of local offices; this form of research found was highly successful in our attempt to improve our businesses website. On November 15th, we reviewed all of these competitor's sites. While researching these sites, we came upon a competitor's site that allowed customers to pay their bills online and apply for a credit card that provided rewards for the customer. We found this feature to be very helpful for people who are busy and cannot stop in the office, or who are unable to mail in a bill in a timely manner. Another common scenario we came across was that many sites have direct links to their Facebook pages and other social media sites which allows the customer to interact with the business more often. Jacobson Dental does not use any social media to its full potential in an advertisement attempt. We found that several other business allow for more current efforts in return to receive more travel back to their website and business overall. Social media is the most important difference we found between the competitors and Jacobson Dental; this gave us one of our main focuses for improving to Jacobson Dental's website. Another office in the area, also show local pictures of patient smiles in the area that they fixed. Jacobson Dental only offers these photos on walls throughout its business, not its website. Visiting these competitor's sites also provided us with information on how other competitors portray their atmosphere to their patients.



To the left, is a screen shot of the Bentz Orthodontics website. Features we liked about their website include: the bright colors and client pictures.

Customer Survey: Another form of primary research we conducted included the distribution of surveys to 100 randomly selected customer's visiting Jacobson Dental. However, we found that the privacy issues involved in the overall distribution may have contributed to a slight set back in our research collection. We first received approval by Dr. Jacobson, and then an employee at the front desk, properly distributed and collected each survey. We found that many of the customers were from around the West Salem area and as far as 40 minutes away. In addition, 97% of respondents were, repeat customers; the high percent of repeat customers also reflects the businesses average overall score of customer satisfaction from 1 to 10 which ranked 9.5 out of 10 by customers. The average demographic age range of Jacobson Dental's customers was those in their 40's to their 50's. The vast majority of these customers heard about the business through radio advertising or family/friend recommendation. Another common occurrence we found on these surveys was that a high percentage of customers were either unaware Jacobson Dental had a website, or had known and never visited. Just as we had expected, many of these customers' favorite social media site is Facebook. As we speculated, this information provided us with the knowledge of ways to expand Jacobson Dental's advertisement tactics.

Focus Group: Our focus group consisted of marketing and business students from our high school. We wanted to have a knowledgeable group of people who knew how to review websites and make suggestions on marketing strategies for Jacobson Dental. We decided to work with students because teenagers spend a significant amount of time on the internet and know what makes a person want to visit a website. We had thirty students fill out a questionnaire on what improvements, incentive ideas, and any personal comments of the overall website. Surprisingly, a vast majority of students left comments that the site had a spa feel to it, rather than a dentist office. These constructive comments provided us with details and opinions other people have when visiting the website. The chart on the right shows that 95%, of the focus group liked the overall layout and design, but what the website lacked was meaningful pictures of patients they have helped. One

aspect our focus mentioned was that, Jacobson Dental should consider is adding pictures of patient's smiles they have fixed. This would show other customers that Jacobson Dental has quality long lasting work, and the success rate is very high. Since, Jacobson Dental is known for improving patient's smiles and having successful customer care. Here are some other valid points brought up in our focus group that could be done to improve the overall website:

1. Adding a search box for patients to quickly find what they need: This would allow the customers to have a hassle free experience when visiting the website. Also, this could allow Jacobson Dental to better track what people search which could allow ideas on how to easier access certain elements on the site.

2. Change the overall color palette and make the colors more vibrant and inviting: Vibrant colors on the layout would help the overall browsing experience and bring warmth to the website.

3. List general pricings and monthly promotions that Jacobson Dental offers: This will gain business in the long run, and it will bring more people into the office. Jacobson Dental should provide customers with price point averages so they can compare their office to other dentist offices.

4. Change the contact information to the top of the website: Jacobson Dental should have all the contact information on the top of the page allowing easy access to customers who need to call in emergency.

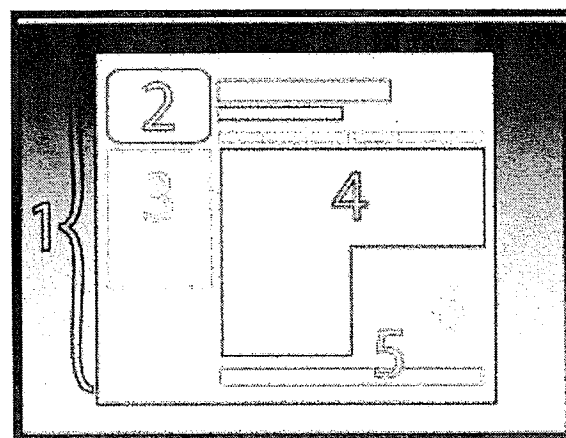
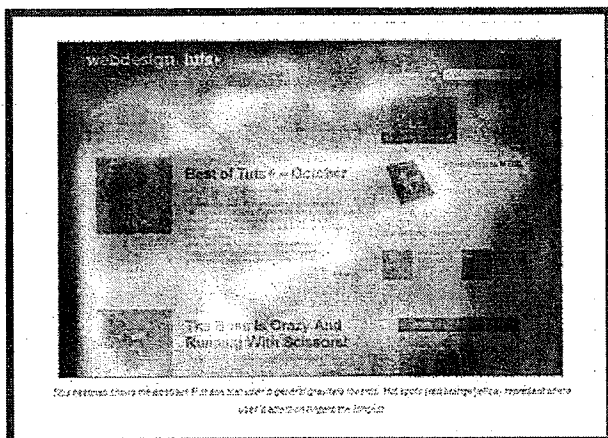
5. Current updated photos and information about the employees: This would create a better welcoming environment on the website, and would add a personal touch compared to other offices in the area.

6. Link social media sites to the website: Currently, Jacobson Dental does not have any social media sites, but adding links on their website would be beneficial for easy access and closer tracking the effectiveness of their website.

7. Pictures that reflect their work in dentistry: This would give customers a better idea of Jacobson Dental successful smiles in the coulee region.

Competitor Interview: While attempting to gather information from another form of primary research for our project, we developed and distributed a short 12 question survey to a total of 8 local offices throughout our community. We distributed these surveys the last week of November, November 25th through the 30th. The competitor interview included a brief summary of who we are and asked several short questions covering the topics of advertising, their website, social media, and costs of these functions. What was quite shocking was that, 7 of the 8 businesses used some sort of social media site to stay involved with their customers care. Jacobson Dental is also one in the area that does not use any form of social media sites which we find lacks customer connection. In addition, most business use the feature of paying bills online and easily accessing a personal care page for each patient where they can view what they were being charged for. Some competitors provided information on how much money they spend on their websites; along with how much money they spend overall on advertisement.

Presentation by Carol Neill: Carol Neil is the local Vice President for Interactive Media for Altra Federal Credit Union Financial located in our area with a small branch located in our school. She provided us with information on contributing to an overall qualitative website. We interviewed Carol on November 13th, 2012. The three basic categories Carol covered with us are design, purpose, and content. Carol provided us with information on how the design of a website must match its target market, and how to use the “F” design. The “F” design is an eye tracking study that says there the most important elements should be placed.



These elements include, branding, navigation, and they call to action and should be found on the left side of the screen. The purpose of a website is to market products and promote new ideas, but Jacobson Dental lacks both of these. Content we looked over on Jacobson Dental's site includes how current, accurate it is, and the usage of text thought the site. When reviewing Jacobson Dentals site, we found that the information is accurate, but needed to be updated, while the text used is very beneficial to the site. Carol provided information on the reasons to use social media, media tactics, and media metrics. This information offered us a helping hand while attempting to better the usage of Social Media used by Jacobson Dental.

IV. FINDINGS AND CONCLUSIONS OF THE SWOT ANALYSIS

The SWOT analysis allows us to identify the businesses strengths, weakness, opportunities, and threats. Below is a chart we constructed to display these previously stated articles.

Overview of SWOT analysis:			
Strengths:	Weaknesses:	Opportunities:	Threats:
Easy to follow layout	Lack of promotions	Google Analytics	Lack of social media sites
Organization pull tabs	Employee photo update	Customer incentives	Contact Information
Slogan	Marketing techniques	Target Market	Customers unaware of website

A. Strengths of the business's or organizations website

Jacobson Dental has a great start to their website, and their layout is easy to follow which allows the customer to effortlessly find information. Jacobson Dental partners with another company called Prosites where they manage and operate the website. The layout follows the "F" design and is very catching to the reader's eye. Results from our focus group showed that the pull down tabs at the top of the site were a simple way to navigate through the website. Furthermore, at the top of the website, there is a very distinctive slogan which truly validates Jacobson Dental's overall dental outlook. "All Aspects of Dentistry," truly sums up the overall customer care that a patient can receive at Jacobson Dental. Most offices in the area, do not offer everything. This proves patients can get "the best of the best" service at Jacobson Dental.

B. Weaknesses of the business's or organizations website

The website of Jacobson Dental lacks: promotions, updated employee photos, and a defined purpose to gain customers. An easy way to direct patients to the website would be offering promotions each month. Simple ideas could bring in new customers and offer an even high customer satisfaction. Jacobson Dental could offer monthly promotions like: 10% off cleanings and \$25.00 off a bill when referring a new patient. Steps taken to gain full usage of the website are essential in gaining customers and revenue. All of the local competitors clearly stated that their website was for advertising purposes. Each of the local offices websites have not been updated in a while, so this would be the perfect time to renovate the Jacobson Dental site. By fixing the website, certain marketing strategies could help gain customers and revenue in the long run to raise the successfulness of the business. Most Jacobson Dental customers heard about the office from the radio, but we want more usage of the website and social media sites. Another weakness is that Jacobson Dental lacks, current photos of their employees due to the website not being updated for a few years. Photo updates of the employees should be done so it's easier for customers to put a face with a name. Another discovery we found when conducting the survey was that several of the patients at Jacobson Dental were unaware of their

website. We believe there needs to be more promotion of the overall website to better market what it has to offer.

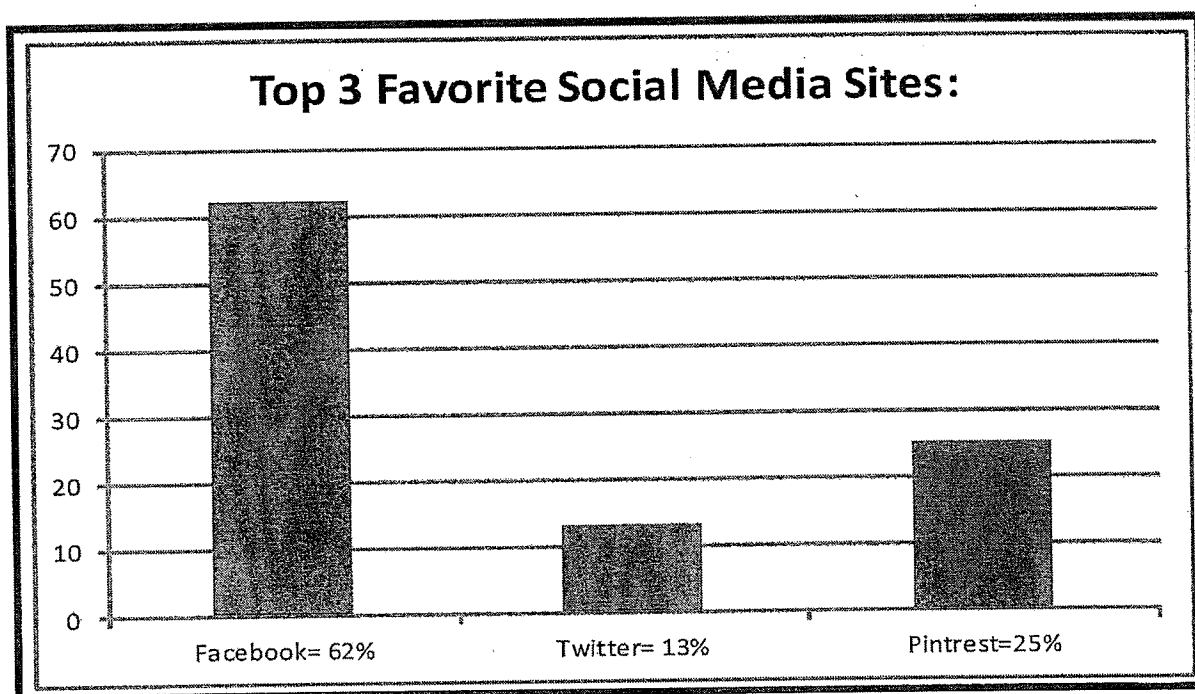
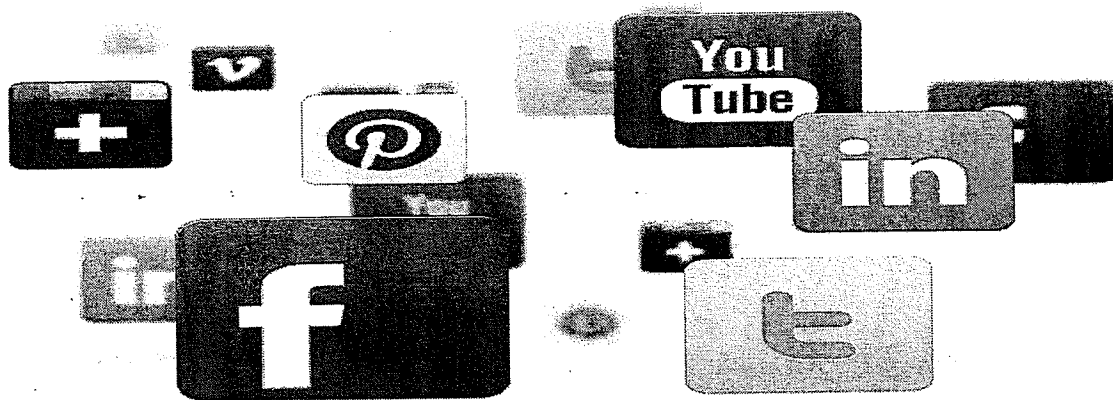
C. Opportunities for the business's or organizations website

The overall website has several strengths for a successful business, but there are a few opportunities we came up with to market their business better. First off, Google Analytics is a great tool to use if your business owns a website. Google Analytics is a free serviced offered by Google that generates in-depth statistics about guests on the website. This will provide a better target market for the business, and it can track visitors from search engines. Secondly, we believe Jacobson Dental would benefit from using current social media sites to interact with their customers. Many businesses do this in a way to give their clients easy contact and sites like Facebook and Twitter are free. Several businesses use social media sites to stay involved with their patients. Jacobson Dental lacks customer incentives online; this drives customers to the businesses website. Jacobson Dental will have higher customer satisfaction scores by offering patients monthly incentives. By offering patients social media sites, Jacobson Dental can better establish a target market for their customers. These sites will help Dr. Jacobson and her staff find new ways to promote their business. We find it important with the new website that Jacobson Dental works on establishing their target market, and open up the business to a variety of people. By offering social media sites and incentives to customers, Jacobson Dental will be able target young customers.

D. Threats to the business's or organizations website

One major threat of the Jacobson Dental website is that they are lacking social media pages. Social media pages allow customers to directly stay in contact with the business by easily saving numbers in to their phone. 95% of the customer's surveyed used some sort of social media site, and most people used Facebook. The graph below shows the top three social media sites of Jacobson Dental patients.

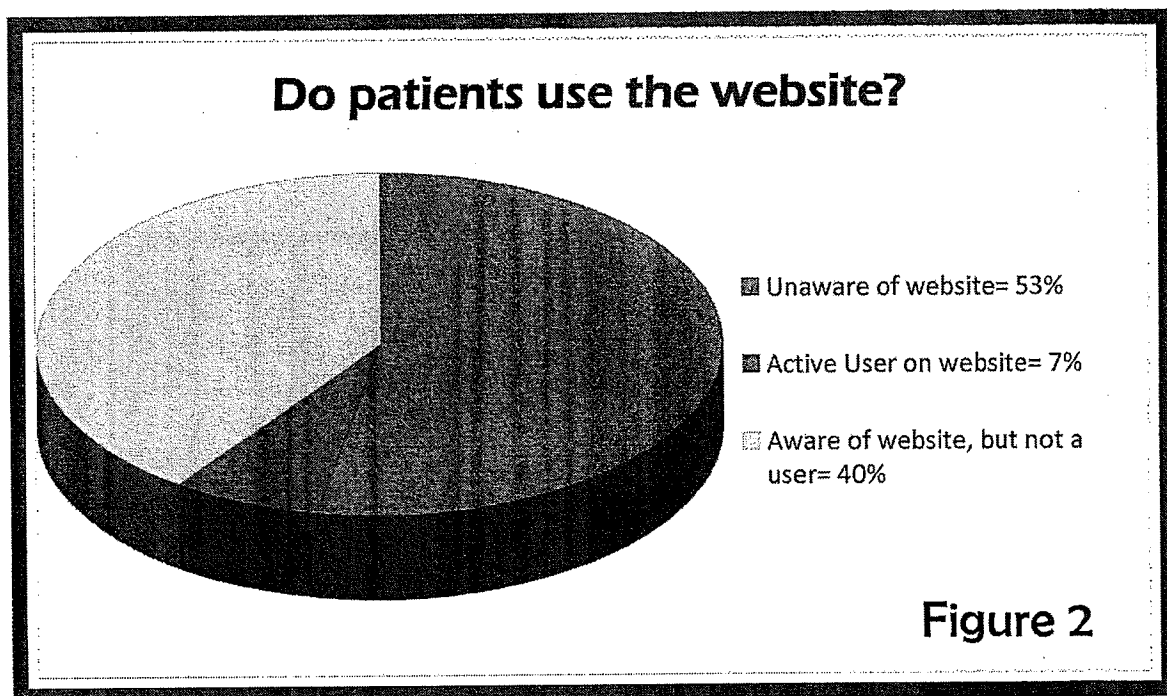




In addition, 83% of the local dentist offices also use social media sites like Facebook and Twitter to keep in touch with their customers. Jacobson or a new dental would benefit from a social media site like Facebook. Social media sites are up-to-date, free, and personalize a business. Also, it would satisfy customer's needs and allow monthly promotions which will expand the business in the long run. Another threat is where the contact information is placed. While the phone number is placed in the upper right hand corner, the office location and email are only available by scrolling to the bottom of the page. This is a concern because

searching for the contact information potentially loses customers that might be looking for a new dental office.

Furthermore, Jacobson Dental needs to work on the marketing strategies of their website, and promote the overall site more. The graph on the below shows that 53% of the people surveyed did not even know Jacobson Dental had a website. Also, of the 40% that knew of the website rarely yet never visited it. Jacobson Dental needs to promote the website better by adding customer incentives to competitions, referrals, and usage of the website. Lack of social media sites, contact information placement, and website marketing techniques are three things Jacobson Dental can improve to better their business.



V. PROPOSED STRATEGIC PLAN AND COST ANALYSIS

A. Develop a strategic plan to revise and improve the business's website

Goal 1: Fix www.jacobsondental.com		
Objectives:	Short-term:	Long-term:
We want to expand visuals, apply a better color scheme, and fix the contact information placement.	Enhances visual appeal, and is cost effective.	Website distinguished as superior.

Upon viewing Jacobson Dental's website, customers may notice the lack of employee photos, bad placement of the contact information, and a poor color scheme. We want to make the website fun and inviting for all ages to expand the consumer market. To begin with, we proposed the idea of adding current updated photos of all the employees. We want to increase awareness of each employee, and not give customers false information. In addition, we found in our focus group that 82% of the participants reported that the current website appeared to be plain and boring. Changing the text from orange and yellow to a variety of blues will be more welcoming and sophisticated. In order to keep the customers aware of the business, the contact information placement will need to be changed on the current website. The contact information should be placed on each page towards the top of the site to enhance a stronger visual appeal and to gain customers in the long run.

Goal 2: Create several social media sites		
Objectives:	Short-term:	Long-term:
Incorporate Facebook and Twitter to gain potential customers	Connects with current customers to offer them alternate ways to contact Jacobson Dental.	Encourages customers to become further informed about Jacobson Dental, and allows for expansion with gaining new customers.

One improvement we want to make that will enhance the overall market of Jacobson Dental is work with Dr. Jacobson to set up a Facebook page for the business. To better reach customers, Jacobson Dental must apply social media sites like Facebook and Twitter. From our research; most patients use a Facebook page as their primary social media site. Jacobson Dental could create better relationships with their customers outside the office, and set up easy simple incentives to gain customers. We want customers to post on discussion boards to develop further ways Jacobson Dental can improve the business. Furthermore, almost all social media sites are free which cuts down a huge cost when it comes to promoting and expanding the business. Also, we will include office hours, contact information, and monthly promotions.

Goal 3: Photo contest		
Objectives:	Short-term:	Long-term:
Provide customers with rewards to show of their smile on the Jacobson Dental website.	Creates better quality visuals on the website, and shows customers that smiles are improved at Jacobson Dental.	Long-term relationships are formed with customers and their families.

Furthermore, customer satisfaction is very high at Jacobson Dental, and to maintain that, we decided to give a free gift to one patients and their family. Each patient who goes to jacobsondental.com and signs up for the "Model your Smile" will be entered to win a free photography session with a local photographer, and their pictures will be featured on the Jacobson Dental website. The sign up is easy, and each patient will be asked to fill out a short questionnaire and provide at least two refer patient recommendations. Megan Jean Photography offered to partner up with Jacobson Dental to take photos of one patients' family to show off their smiles on the website.

Goal 4: Incentive Program		
Objectives:	Short-term:	Long-term:
We want to offer customers electric tooth brushes to keep up customer satisfaction.	Expand the use of the website services by customers	Expands the business and allows customers to recommend new patients.

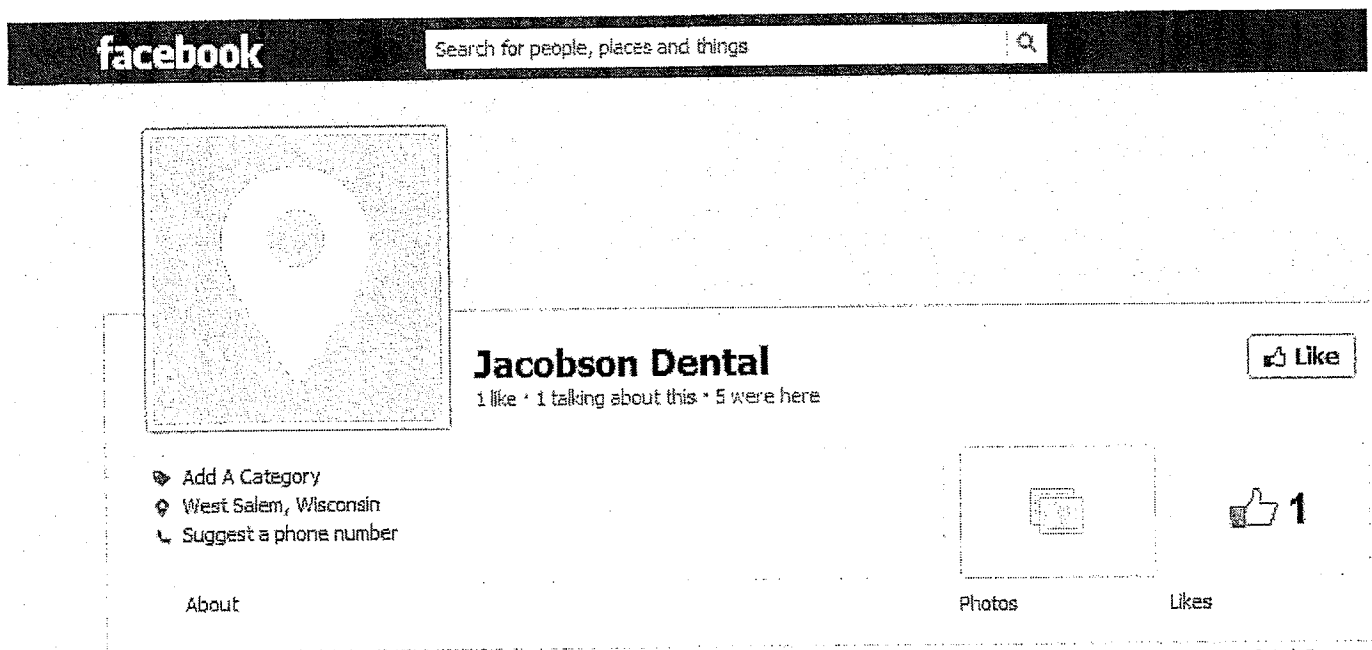
In addition, we will offer incentives to those who partake in the discussion to encourage customer participation. Also we want to expand the incentive program, by applying monthly incentives from the website, and social media sites. As mentioned earlier, we will offer a photo contest to patients once a year that will gain the business revenue for each family/friend they refer. In addition, we want to give away free items like, electric tooth brushes, tooth paste, and mouth wash when customers refer new patients.

B. Create a timeline to implement the strategic plan

Expanded Goals:			
Remodel and fix the www.jacobsondental.com within 3 weeks	500 likes on Facebook page with 3 months	Gain customers through the new incentive program	Have 100 customers sign up for the photo contest

When conducting primary research, our focus group made it clear that the website need to fix a few things including the color scheme, employee photos, and contact information. Results showed that most people thought the look and feel of the website looked like a salon. One way to fix this issue is to create a new advanced layout style that has the look and feel of a dental office. We want the website to be welcoming, current, and show of the advance technologies of the office. The color scheme that is most inviting to everyone is light blues, and grays which creates a sleek design. In addition, current photos will need to be updated to provide an accurate idea of the business. Furthermore, contact information should be placed on each page to allow customers to easily find the business. Our goal for this is to have a clean sleek design created by Prosties, and approved by Dr. Jacobson and her staff in less than 3 weeks. The website has not

been changed since it was first created, and changing the website will hopefully increase website traffic. Secondly, we want to create a Facebook page with Dr. Jacobson Dental and her staff and have it up in running in less than a week. In order for this to be successful, we will need to add correct contact information, employee photos, and create an about me page. After the website has been established, we want to set a goal for the Jacobson Dental Facebook page is to get 500 likes within 3 months of creating the site. In order to do this, an easy URL will be set up. (facebook.com/jacobsondental). All patients and guests can access the account from a smart phone or computer. Also the Facebook page will have a direct link on the website, and will be promoted in the office with signs that say, "Like us on Facebook." In addition, we want to gain customers through the new incentive program that we talked about earlier. All of the incentives will be done through the Facebook page and the website which, through patient referrals will gain customers. In one year's time, we want to gain a total of 35 new patients from the promotions we do online. Also we decided the photo contest will run for one month, and our target is to have 100 people sign up for the contest which will show off the new website design. This gains traffic on the websites and hopefully will lead them to the Facebook page. If this is a successful contest, we hope to implement it each year to gain new patients and show off a new photo gallery.



C. Develop a cost analysis of revising the website, hosting fees, and technical support

Cost Analysis:		Breakdown:	Total:
Proposed Idea 1:	Adding in payment, new easy appointment scheduler, and selling products	Prosites fee an estimated cost of \$255.00	=\$255.00
Proposed Idea 2:	Maintaining a Facebook page **Additional promotions done each month on Facebook page	\$0.00 12 times x \$40.00	=\$0.00 =\$480.00
Proposed Idea 3:	Free electric tooth brush to one lucky winner each month by referring a friend	12 mos. X \$50.00	=\$600.00
Proposed Idea 4:	Average cost to maintain the website by the company prosites.com	1 year x \$605.00	=\$605.00
Proposed Idea 5:	Adding to the website: employee pictures, links, and a search bar	1 year x \$450.00	=\$ 450.00
Proposed Idea 6:	Model session by Megan Jean Oliver Photography for up to 4 people for 1 hour	1 session x \$100.00	=\$100.00
			=\$2,490

D. Identify revenue streams for the website

Jacobson Dental can gain revenue several ways on their website by allowing customers to pay bills, set up appointments online, and buy products online. First off, Jacobson Dental needs to set up an easy way to pay bills and manage them online. By allowing customers to pay bills online, it brings customer satisfaction along with no hassles of mailing in a check. Allowing customers to pay bills online brings great satisfaction. This proposed Idea will bring forth the most return on investment, mainly because it is a quicker way to make payments. In the long run, customers will be happier and payments will be on time. Customers will easily be

able to set up an account that safely stores their information, and paying a bill will take less than five minutes and can be done in the convenience of their homes. Also, Jacobson Dental needs to fix how customers set up appointments online by adding to the appointment feature. This will earn the business money by having an easier process for people who have busy a lifestyle. In addition, with an easier way of setting up appointments online, customers will be able to track when the appointment is. Overall this accounts for a lot less late arrival times and fewer missed appointments. We hope this raises the amount of appointments for one year by 25%. Furthermore, Jacobson Dental should offer products online, like the electric tooth brush. If Jacobson Dental sold electric tooth brushes online, it would bring the most revenue for the business because they could make a profit of \$70.00. Jacobson Dental will gain ROI if they choose to sell this product online. For each electric tooth brush they sell they make \$70.00. If Jacobson Dental sells 5 tooth brushes a month, they make a total of \$350.

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VII. APPENDIX

Competitor Interview

Hi, we are local Holmen High school students participating in DECA which is a group of marketing and business students. We are wondering if you are interested in taking this short questionnaire about your business/website. We will be using your results in a chapter project. Thank You! Ashli Callaway and Elizabeth

Gogolin ☺

Dentist name:

Owner:

1. Do you have a website?
2. What is the goal of the website?
3. What times of things do you promote on the website?
4. What would you change about the current website?
5. How often do you update the website?
6. Who is in charge of the website?
7. What the monthly costs are of maintain the website?
8. What can customers do on your website?
9. What other forms of social media do you use, and how do you use it in your business?
10. What other types of advertising do you use?
11. If you haven't done much advertising, why?

Customer Survey: Got a Minute?

Hello, our names are Ashli Callaway and Elizabeth Gogolin, we are students at Holmen High school participating in DECA which is a group of marketing and business students. We are conducting a survey based on the website of Jacobson Dental. Your answers will provide us with key information towards our research project.

What is your age? _____

Gender: MALE FEMALE

What city are you from? _____

Are you a repeat customer? YES NO

What would you rate your customer service? (10 being the highest)
1 2 3 4 5 6 7 8 9 10

Where did you hear about the business?

- Radio
- Internet
- Print Advertisement
- Family/Friends
- Other

Rank the friendliness of the employees (10 being the highest)
1 2 3 4 5 6 7 8 9 10

Are you aware that Jacobson Dental has a website? YES NO

Have you ever used the website? YES NO

If yes, what improvements would you make to the website?

If no, what incentives would bring you to the website?

Thank you, for taking your time to fill out this survey. We appreciate your constructive comments!

Jacobson Dental Focus Group Questions: www.jacobsondental.com

Please take the time to fill out this short questionnaire on the Jacobson Dental website! Please critique it based off the layout, overall feel of the website, and feel free to add other comments.

Thank You! Ashli Callaway and Elizabeth Gogolin 😊

1. List a few things you liked about the website:
2. What improvements are needed to make the website better?
3. Are there any incentives that would 'drive' you to visit the website?
4. Is there anything that 'catches' your eye?
5. How do you feel about the photos? Would you add to, or limit the amount of pictures?
6. Any other comments?

Personal Interview with Dr. Jacobson

1. What type of business is this? (Sole Proprietorship, Partnership, Corporation)
2. When was the business established?
3. How many employees work here, and what are the different positions you have?
4. What is the average age of your typical customer?
5. What is the gender breakdown of your customers?
6. What do you like most about your job?
7. Who is your target market?
8. Why do customers come to your store, as compared to competitors?
9. Who are your direct competitors?
10. What do you feel is unique about your business?
11. What are some of the services that your business offers?
12. How long have you owned your business, or have been in this position for?
13. Where do most of your customers come from? (city, state)
14. What percent of your customers are repeat customers?
15. What are the latest trends in your industry?
16. What types of technologies are important parts of your business?
17. What are your business hours?
18. Approximately how much do you spend a year on advertising?
19. What are the forms of advertising you use? (TV, newspaper, Radio)
20. If you haven't done much advertising, why?
21. Do you have any plans of major changes for the business in the future?
 - a. Relocation
 - b. Staff Reduction/ Expansion
 - c. Change of type of ownership (adding a partner)
22. Do you have plans to expand your customer base and if so how will you go about accomplishing this?
23. What would make your customers more loyal to your business?
24. What type of customer service training do you offer that your competitors don't?
25. What do you feel that is important for your business to have a positive reputation and live up to a high moral standard of doing business?
26. What do you feel is the perception of your business by customers and the community?
27. How do customers perceive your customer service and your products or services?
28. Do you have a website?
29. What is the goal of your website?
30. What types of things do you promote on your website?
31. What would you change about your current website?
32. How often do you update your website?
33. Who is in charge of your website?
34. What are your monthly costs of maintaining your website?
35. What can customers do on your website?
36. What other forms of social media do you use and how do you use it in your business?
37. Other

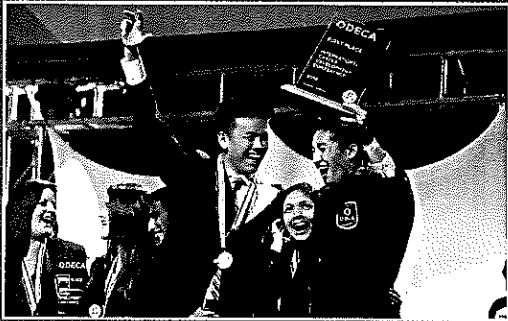
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I. EXECUTIVE SUMMARY

"When your kid is struggling in school and is crying every day, simply tutoring isn't enough."

-Surinder Dulaï, manager of Huntington Learning Center Cupertino

Huntington Learning Center is a chain of tutoring centers across the United States that has been educating children since 1967. Although Huntington ranks as a leader in the \$5 billion US tutoring industry, their national confidence does not echo in the Cupertino, California location. This plan aims to rectify this shortcoming and redefine Huntington as a premier tutoring center in the Silicon Valley, surpassing the reputation of Huntington centers nationwide. If the rebranding fulfills our metric goals, we hope to apply this business plan to Huntington locations across the United States.

	CURRENT	PROPOSED
BRAND	A tutoring business which helps students regain self-confidence through academic progress. However, students are put off by the outdated and disconnected services.	A modern and completely personalized educational service that aids students in all aspects of today's educational system, from academics to extracurriculars and applying for college.
TARGET MARKET	Huntington's promotional tactics target students who are receiving bad grades in school or need test preparation.	We will target both parents and students. Parents make the final buying decisions, so it is necessary to target them in addition to students, who are the consumers.

Proposed rebranding plan: We propose DELTA, a three-pronged plan:

1. *Reinvent:* We propose to rename Huntington Learning Center to Exceed Education, and to remodel the facility to reflect our change in brand and to better serve our consumers.
2. *Reprogram:* We will revamp our current tutoring programs and add college counseling services in order to reflect the vision that Exceed Education caters to all the needs of students. We will also implement an advisory board to provide a channel for communication and change between Exceed Education and its clientele.
3. *Rewire:* To convey our modern ideals and better serve our customers, we will provide an interactive portal for our students which consists of a college counseling profile, progress tracker, and a personalized calendar to improve organizational skills. The outdated Huntington web page will also be redesigned as the Exceed homepage, and will reflect our new aesthetics and values.

Promotion: Each promotional method will serve to either increase brand recognition or send a message: that Exceed understands the stress that students undergo, and designs its programs to lower stress, increase efficiency, and exceed. Rebranding Huntington will be futile if the community is not informed of our changes. Therefore, we will take an aggressive stance on promotion, utilizing guerrilla marketing, word-of-mouth promotion, and social media promotion.

Finance: We are requesting a \$1,300,000 investment to fund our rebranding initiative. After five years, the projected net income will be \$3,897,907, yielding a 199.84% return on investment.

With DELTA and our promotional campaign, we are confident that rebranding Huntington as Exceed Education will place it at the top of the education industry in the Silicon Valley. Given time, our proposal will be implemented in locations across the United States, and Exceed Education will revolutionize the education industry.

II. INTRODUCTION

A. Description of Huntington Learning Center

Huntington Learning Center is a tutoring service dedicated to giving students the best education possible. The first center was opened in 1977 by Dr. Raymond and Eileen Huntington, in New Jersey. Since its inception, more than 300 other franchises have opened nationwide in the US. They recognized a need to offer high quality education to students in the area. Huntington Learning Center offers tutoring and test preparation services for elementary to high school students. For K-12 students, Huntington Cupertino focuses on basic academic skills like reading and writing to build a strong foundation. While students are in middle school or high school, subject tutoring is offered. Exam preparation is offered as a one-on-one service to middle and high school students.



FAST FACTS OF HUNTINGTON CUPERTINO

Manager	Surinder Dulai
Square footage	1750 sq ft
Number of employees	10
Number of students	96

SERVICES OFFERED AT HUNTINGTON CUPERTINO

K-12 STUDENTS	MIDDLE TO HIGH SCHOOL	EXAM PREP
reading • writing • math • study skills • spelling • vocabulary • phonics	pre-algebra • algebra • geometry • trigonometry • pre-calculus • calculus • earth science • biology • chemistry • physics	SAT/PSAT • ACT • AP • state tests • ISEE • HSPT • SSAT • GED • ASVAB

Huntington has been accredited by the both the Middle States Association of Colleges and Schools and the Western Association of Schools and Colleges; these accreditations indicate that Huntington meet commonly accepted standards of educational quality. In order to maintain this prestige, Huntington professionally trains all of its tutors through a rigorous "Huntington Certification" program.

B. Description of the community

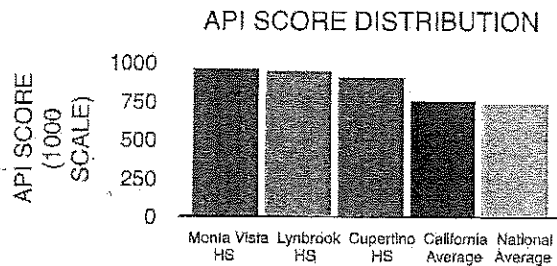
I. ECONOMIC

	CUPERTINO	CALIFORNIA
MEDIAN HOUSEHOLD INCOME	\$127,534	\$61,400
UNEMPLOYMENT RATE	3.9%	8%
POPULATION DENSITY	5,179 people/sq mile	228 people/sq mile
POPULATION GROWTH RATE	1.1%	0.71%

In Cupertino, a suburban city representative of the Silicon Valley, household income levels and subsequently disposable income levels are significantly higher than those of California. The educational attainment level and local API scores are elevated as well, indicating the importance of education in the Silicon Valley. These factors provide favorable conditions for growth for a company such as Huntington Learning Center.

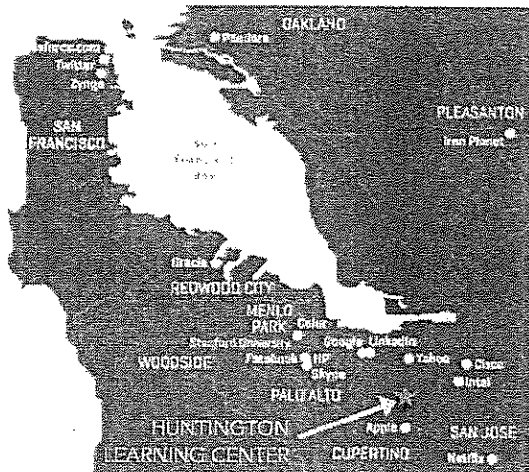
II. DEMOGRAPHIC

EDUCATIONAL ATTAINMENT	PROPORTION
Master's degree or above	39.63%
Bachelor's or associate	39.19%
Some college or high school	17.42%
Other	3.76%



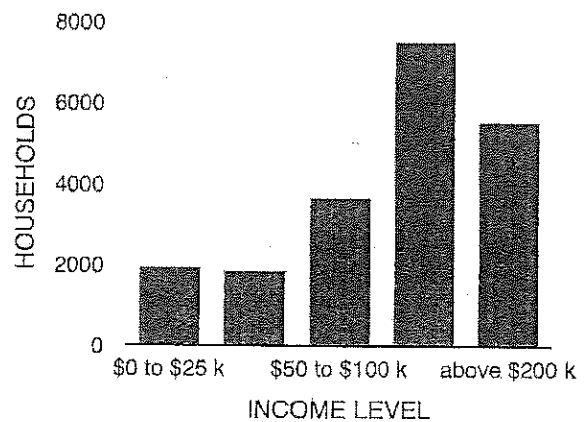
One in four immigrants to the United States live in California, and the concentration of Chinese, Indian, Korean, Japanese, and Taiwanese immigrants is highest in the Silicon Valley. The main objective of immigrants to this area is to provide for a better future and education for their children. This drive for a better education contributes to a large market for supplementary education.

III. GEOGRAPHIC



Huntington Learning Center Cupertino is located in the heart of Silicon Valley and in the San Francisco Bay Area in California. Cupertino is home to Apple Computers, and is in proximity to other technology giants, shown above. This underscores the importance of technology to households in the area. Huntington is surrounded by multiple high-achieving high schools and is within walking and driving distance for thousands of students.


IV. SOCIOECONOMIC



The income distribution of Cupertino, shown above, is relatively uniform but skewed left, showing the high median salary and lack of socioeconomic stratification. The high median salary and high disposable income, combined with a psychographic drive for success and a higher education, provides a profitable market for Huntington Learning Center.

C. Description of Huntington Learning Center's mission, target market, and existing branding efforts

Shown in the chart below are descriptors of Huntington Cupertino's current branding initiative.

	<p>"To give every student the best education possible"</p>
MISSION STATEMENT	<p>This statement shapes many of the decisions made in Huntington, ranging from the curricula, to program duration, to tutors chosen. In abiding by this statement, all Huntington professionals adhere to the highest standards of conduct in the company's Code of Ethics. This is composed of professionalism in services, confidentiality with students, and honesty:</p>
TARGET MARKET	<p>Students in grades K-12 who require additional assistance in their education and standardized testing preparation.</p> <p>A professional, trustworthy tutoring service</p>
BRAND	<p>Huntington's value proposition is that it solves the problem of "bad report cards." Huntington comes across as a remedial tutoring service for students who struggle with both academic activities and personal issues such as low self-confidence.</p>
LOGO	
SLOGANS	<p>"Your tutoring solution"</p> <p>"Your child can learn"</p>
BRANDING EFFORTS	<p>Huntington currently perpetuates its image of professionally and transparency by detailing the tutoring process and tutor training process on its website.</p> <p>Huntington's cinema advertisements, mail-in brochures, and Google advertisements target students whose bad grades have caused personal issues such as fighting over grades or low self confidence.</p> <p>The current brand image projects the sense that Huntington is a last resort, a place for students in in serious academic and personal troubles. In fact, this brand effectively serves to establish a short term relationship with students who are seeking help, because the relationship ends as soon as Huntington provides an immediate "tutoring solution" to the student's problem.</p>

III. RESEARCH METHODS USED IN THE STUDY

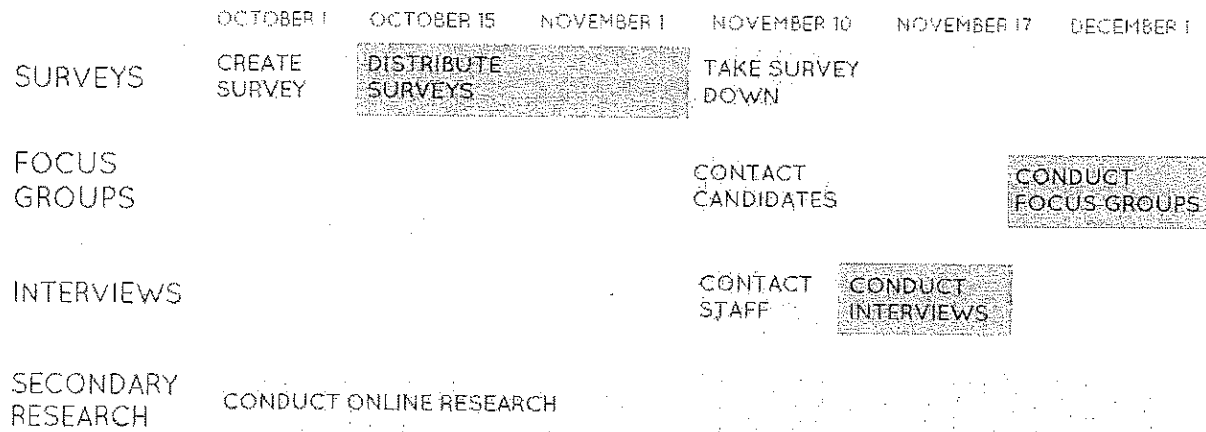
A. Description and rationale of research methodologies selected to conduct the research study

These five research methods have been selected to identify possible rebranding opportunities for Huntington Learning Center.

RESEARCH METHODOLOGY	DESCRIPTION AND RATIONALE
Surveys: <i>students and parents</i>	<p>Surveys are the most convenient manner of gathering information on the tutoring market in the Silicon Valley due to the ease of distribution. The input of both parents and students give us valuable insight into Huntington Learning Center's brand recognition and effectiveness of its promotional methods. The surveys also allowed us to learn more about customer and consumer trends in the area.</p> <p>The focus group is composed of 10 randomly selected students from ages 12-18 in the Bay Area.</p>
Focus groups: <i>students</i>	<p>Students are currently the consumers of Huntington Learning Center's services, and therefore, understanding their desires and behavioral patterns is vital. A focus group is an optimal atmosphere for the sharing and development of ideas, as humans tend to be more comfortable sharing their opinions when others are doing the same.</p> <p>This focus group is composed of 10 randomly selected parents of students aged 12-18 in the Bay Area.</p>
Focus groups: <i>parents</i>	<p>Parents are the customers of Huntington Learning Center. They make the buying decisions and hold the purchasing power in households, therefore, understanding their desires and behavioral patterns is central to developing a promotional and rebranding plan.</p>
Interviews: <i>Huntington management and employees</i>	<p>Interviewing the manager of Cupertino Huntington, Surinder Dulai, allows us to obtain information on facility operations, current promotional and branding initiatives, future plans for Huntington, and any problems or difficulties.</p> <p>Interviewing Huntington's tutors allow us to gain personal insight on the tutoring processes and relationships with students. It also allows us to research the learning environment at Huntington.</p>
Secondary research: <i>online research of competitors, industry trends, and marketing strategies</i>	<p>Online research allowed us to gain background information on the tutoring industry in the Silicon Valley and provide context for the creation of our survey, focus group, and interview questions. This research allowed us to roughly gauge Huntington's brand image and identify industry trends and marketing strategies that would better Huntington as a business.</p>

B. Process used to conduct the selected research methods

RESEARCH TIMELINE



Surveys: We designed an online survey using Google Drive to maximize efficiency and convenience for our desired respondents, Huntington's consumers and customers. The survey was designed to gather unbiased information on brand recognition of tutoring companies in the area, customer buying trends, and consumer preferences.

	SCHOOL DISTRICTS	SCHOOLS
	Fremont Union High School District	Monta Vista • Fremont • Lynbrook • Cupertino • Homestead
	Cupertino Union Middle School District	Cupertino • Kennedy • Lawson • Miller • Hyde

In order to gather a random sample of students aged 12-18, we put the link to the survey on local high and middle school websites and social media pages. After a month of collecting responses, we received an average of 185 responses per school.

In order to distribute the parent surveys, we contacted the Parent-Teacher-Student Association of the local districts and requested that they email the survey link to a random sample of parents. We collected responses until we received about a 25% response rate per district, which took about a month, giving us a sample size of about 700 parents.

Interviews: We scheduled an appointment with Huntington Cupertino to interview the manager, Surinder Dulai, and a current employee, Rabiya Wasi. Our interview questions regarded the current branding operations, current trends in the tutoring industry, and any issues.

Focus groups: On our survey, we listed an option to participate in a focus group for a study, and an area to fill in contact information. We randomly selected 10 students and 10 parents out of the survey respondents that opted to participate. After our interview with the Huntington staff, we brainstormed ideas that we presented to the focus group for discussion as well. We reserved a room in the Cupertino Library and met with the focus groups over the week of December 1.

Shown below is a table detailing our focus group discussions.

	STUDENTS	PARENTS
Discussion topics	Supplementary educational centers they attend	Educational services they employ
	Appealing attributes in tutoring services	Value they place in supplementary education services such as tutoring, test preparation, college counseling
	Perception of Huntington Learning Center	
	Advertisements they have seen for tutoring services and their effectiveness	
Word association tests	Issues in education	
	In this activity, we would say a word, for example "Huntington", and ask that the participants say any word that comes to mind. Neuro-psychology suggests that concepts may be stored in the brain in associative clusters. This activity allowed us to gauge the consumer and customer's instinctive reactions to specific words or phrases that make up Huntington's brand identity.	

Secondary research

In order to gauge Huntington's status in the community, we used online search engines to research Huntington's competitors, trends in the tutoring and education industries, and effective marketing strategies.

IV. FINDINGS AND CONCLUSIONS OF THE RESEARCH STUDY

A. Findings of the research study

Interviews: Shown below is a compilation of responses from an interview that we held with manager Surinder Dulai and head receptionist and tutor Rabiya Wasi.

What do you consider Huntington's brand?

It used to be a remedial center, like "your child can learn" was the tagline. It's still a little stuffy, with "your tutoring solution", but I believe the community sees us as professional and familial. We have a lot of family connections, and we get most of our customers through word-of-mouth promotion. Trust and reputation-based. We keep the student's best interests at heart.

How is Huntington different from its competitors?

We have one-on-one test preparation, and we also cater to younger children, which most centers don't do.

How are you currently promoting Huntington and spreading word of its brand?

We market our exam preparation for high school students, and our academic skills to younger students. We mostly use cinema ads and direct mail.

What are Huntington's main strengths and weaknesses as a company?

We have a team of teachers who have been teaching here a long time, and high customer loyalty within families. Our main weakness is that sometimes people and schools see us as money-focused like other centers in the area.

What are some current trends in the education industry?

Education is trending towards more academic skills rather than just getting the grade, which we see in the new common core curriculum. There's a gap between grades and actual skills. Students who have an A in an English class might not even know how to read or write well, but they got the grade because of inflators like participation.

What would you change about Huntington Cupertino?

The name, mostly. Huntington is the family that started the franchise, but now it just doesn't convey who we are. We have some furniture that I'd like to switch out. Our carrels are stuffy.

FOCUS GROUP RESULTS

WORD ASSOCIATION TESTS:

Shown below are four key words/phrases and the main responses from our focus group participants. Size of the words is directly correlated to the frequency of the responses.

HUNTINGTON

golf beach
the disease
bank old
disorder

ELITE

best high class
smart status
education
excel

LEARNING CENTER

remedial
not that smart children
disability

INSIGHT

depth
perspective
caring education

DISCUSSION QUOTES:

"Huntington seems kind of old-fashioned and rigid. It doesn't really stand out to me"

"I was looking for college counseling and tutoring, so I went to Insight Education"

"Students are too stressed and disorganized to focus during the lessons"

"I didn't like Huntington because none of my friends went. I took classes at Elite later on since most of my friends were there"

"I tried to balance my SAT classes with a pretty heavy course load and sports, but eventually I just quit because it was too much"

"I went to Huntington, but it was kind of dull. My tutors didn't really know what I was learning in school"

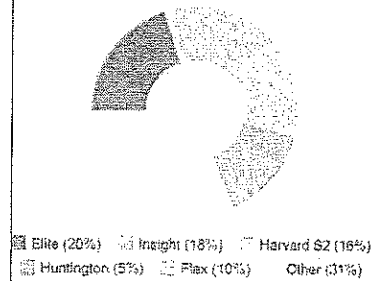
"I try to tutor my son myself. I want to make sure he's learning the right material"

"I was tutored for a while at Elite, but I felt like it was a waste of time because it wasn't personalized"

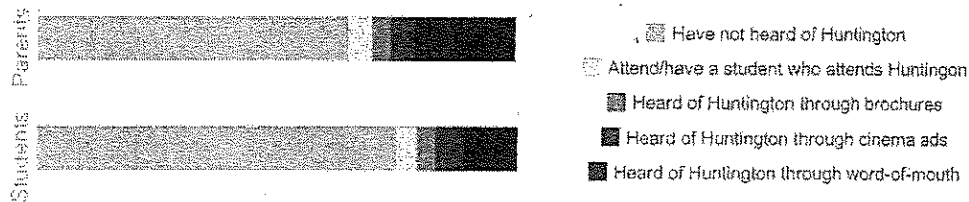
COMPETITOR SERVICE COMPARISON:

	SUBJECT TUTORING	TEST PREPARATION	COLLEGE COUNSELING
Huntington	✓	✓	
Insight Education	✓	✓	✓
Flex College Prep		✓	✓
Elite Education	✓	✓	

PROPORTION OF STUDENT ATTENDANCE:



RECOGNITION OF HUNTINGTON CUPERTINO:



B. Conclusions based on the findings

Huntington does not have a large presence in the community

Huntington's brand image is old-fashioned and disconnected from current trends

College counseling is a growing and lucrative industry

Technological and digital tools provide a competitive advantage

Students have trouble balancing activities and academics

Huntington does not have a large presence in the community: A theme we found consistent throughout our surveys, focus groups, interviews, and online research was that most people had never heard of Huntington, or vaguely recognized the name. Revamping Huntington's brand image and promotional strategies will exponentially benefit the business, and increase profits, as we raise awareness of its new services and brand to the community.

Huntington's brand image is old-fashioned and disconnected from current industry trends:

The community's current perception of Huntington is that it does not stand out amongst its competition in the Bay Area. The dull decor and interior layout are not conducive to learning, according to both survey respondents and the manager. Huntington is out of touch with current trends in education in the Silicon Valley, and is therefore ineffective in tutoring and helping students, and has a competitive disadvantage in relation to its competitors.

College counseling is a growing and lucrative industry: Across the board, we noticed parents and students stated that they or people they knew used college counselors, and often chose competitors over Huntington because they offer both counseling and tutoring.

Technological and digital tools provide a competitive advantage: Huntington Learning Center's location in the Silicon Valley places it in a very tech savvy and innovative environment in which companies incorporate technology into their services in creative and effective ways. However, Huntington remains completely apart from this technological revolution, and therefore is unattractive to consumers and customers who wish to see a modern touch in education.

Students have trouble balancing activities and academics: In today's day and age, with the college admissions process becoming increasingly challenging and competitive, students are stretched incredibly thin as they try to balance school, extracurriculars, sports, interests, free time, and more. The undue stress created from these factors causes students to slip up and underperform in areas that they could easily excel at if given the appropriate chance. This is an issue that Huntington can aim to solve.

V. PROPOSED REBRANDING PLAN

A. Objectives and rationale of the proposed rebranding plan

Shown below are the quantitative and qualitative objectives of our rebranding plan.

QUALITATIVE OBJECTIVES	RATIONALE
Rebrand Huntington by changing the name to Exceed Education, improving the programs, and adjusting the physical atmosphere.	In our research, we found that while Huntington brands itself as a professional and family-oriented tutoring center, Silicon Valley community sees Huntington as an old-fashioned, remedial tutoring center with a rigid curriculum and structure. This brand image is extremely undesirable, so we have developed a proposed rebranding plan to ameliorate Huntington's image in the community. This plan converts Huntington from an ordinary tutoring service to a cutting-edge and personalized educational service.
Enact a new promotional campaign targeting both students and parents, advertising Huntington's new brand	A major issue we saw was a lack of recognition, so we developed a new promotional plan to increase brand recognition.

QUANTITATIVE OBJECTIVES

Increase customer base by 50% through the addition of a college counseling program and promotion

Attain a return on investment of 200%

B. Proposed activities and timelines

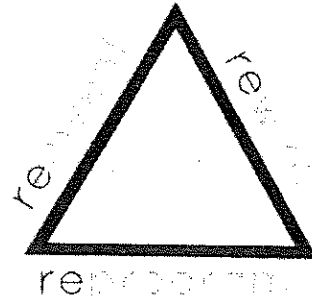
In order to rebrand Huntington, we have assessed our research and developed an organized and effective plan. It will change Huntington's image from an old-fashioned and inflexible tutoring center to a trustworthy, cutting edge, and personalized educational service that appeals to parents, the customers, and students, the consumers. This is vital because Huntington needs to cater to the needs of both groups to thrive. Shown below is the relationship with the conclusions of our research and our proposed plan.

CONCLUSIONS	PROPOSED SOLUTION
Huntington's brand image is old fashioned and disconnected from current industry trends	Change Huntington's name, brand, and remodel the facility
Technological and digital tools provide a competitive advantage	Implement digital tools accessible via computer or phone to make students' lives easier through organization and consolidation
College counseling is a growing and lucrative industry	Implement a college counseling service
Huntington lacks a presence in the community	Implement a promotional plan that will increase the awareness of Huntington

Shown below is a comparison of the current brand and our proposed changes.

	CURRENT	PROPOSED
Target market	Students	Students and parents
Intended brand image	Professional and trust-based service	Cutting-edge and personalized educational service
Value proposition	Solves the problem of a "bad report card"	Prevents "bad report cards" by aiding the students through counseling and technological tools
	Helps students regain self-confidence through academic progress	Alleviates the stress and pressure of today's education system and allows students to focus on learning
Community perception of the brand	Old-fashioned and remedial methods of tutoring	Indeterminable
Services	Tutoring and test preparation	Tutoring, test preparation, and college counseling
Promotion	Mailed brochures and cinema advertisements	

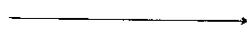
We call our proposed plan DELTA, a three-pronged approach that will revolutionize Huntington with three initiatives: Reinvent, Reprogram, and Rewire. We also developed a promotional campaign for our new brand. These programs and campaigns are detailed below.



reinvent

Our reinvent phase consists of renaming and renovating Huntington Learning Center. *Rename:* Huntington Learning Center will be renamed to become Exceed Education, which better represents the new brand. The current name, Huntington Learning Center, is a founder's name-based brand. It does not convey the purpose or brand of Huntington. We propose to change the name to Exceed Education, because we help our students "exceed education" - that is, we help them rise above the labyrinthine school system and equip them with the ability to excel in both school and extracurricular areas. Additionally, Huntington is currently branded as a "learning center", which is perceived by derogatory in the community, as it insinuates that the attendees lack proficiency or acuity in learning ability. In contrast, naming our company as an educational institute will give it a positive connotation, a place that augments knowledge. Our research showed that only around 25% of the community recognizes Huntington, so the transition from Huntington to Exceed will not damage name recognition.

The logo will be changed to complete the transition. Huntington's logo corresponds to its brand image - old-fashioned and remedial. Exceed's logo corresponds to the sense of modernity we want to lend to the brand. As our consumers are young students, mostly high school students, modernity and technology are appealing features.

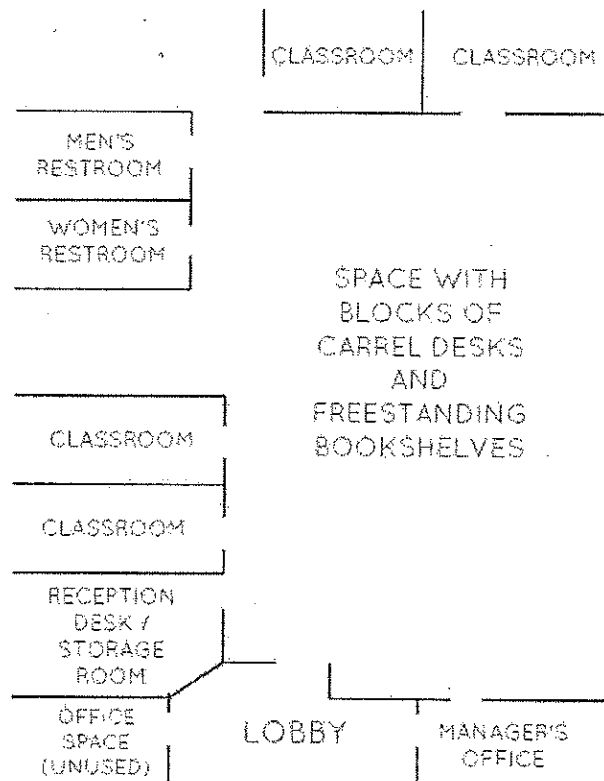


In order to ensure the superiority of the new logo, we distributed another survey; in a sample of 30 students, 28 preferred the Exceed logo to the Huntington logo. The circular logo will play a large part in the brand of Exceed, representing unity and wholeness.

Renovate: Our research and interviews with both staff and students showed that Huntington's physical appearance and structure were severely lacking in many ways, and actually detrimental towards the learning experience of Huntington's students.

On the next page is the current floor plan of Huntington Learning Center. The main structural and design issues here are:

- small office spaces, one of which is completely unused
- only four cramped classrooms for private learning or small group sessions
- large unused spaces between rooms
- enormous open space in the middle of the building is wasted with counterintuitively placed chunky carrel-style desks and freestanding bookshelves



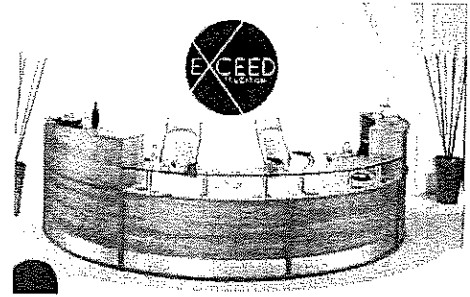
In addition to these design and

structure issues, Huntington seems to follow earth tones, by painting the walls dark green and brown, and this effect makes the building and rooms seem gloomy and smaller than they are.

We decided to remodel Huntington completely, to epitomize Exceed's new values of transparency, personalization, and cutting edge education and resources. The main goal of the renovation will be to maximize the space in the building. The floor plan is shown on the next page. Changes from the entrance of the building to the back are as follows:

- Larger, semicircular lobby will create a more welcoming and comfortable environment

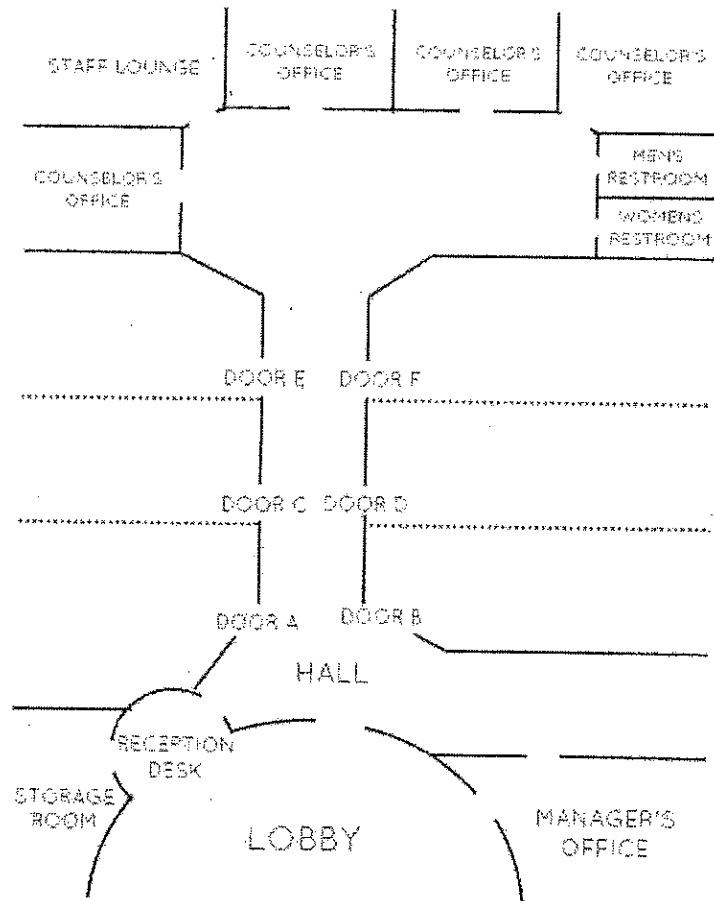
- Integrated reception area (right) follows a modernist architecture theme and is far more welcoming than the previous low window that connected the lobby to the reception area



- Unused office is converted into a storage space, and manager's office is expanded

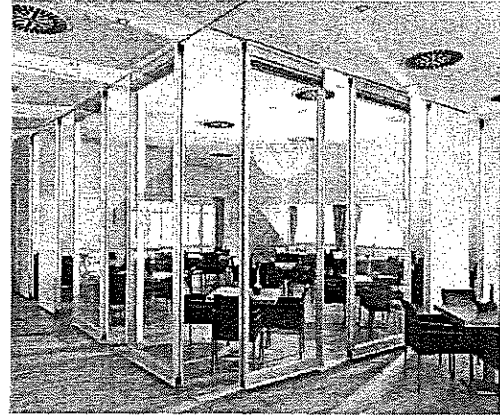
- Multiple entrances connect the reception area, lobby, manager's office, and main hall to each other, to create a more open feeling, in accordance to modernist architecture

- The center of the building has been converted into two spacious rooms bordering a wide hall. Sticking with the modernist theme of integration, the walls will be made of whiteboard, in order to allow teachers to teach effectively, and save room by not using the easels Huntington had.

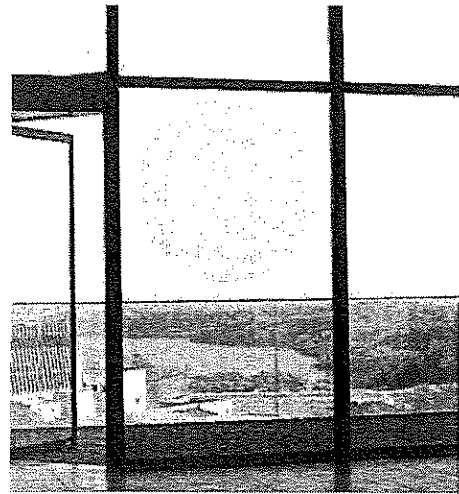


- These classrooms will also have node chairs instead of the cramped and bulky carrel desks. Node chairs are chairs on wheels with rotatable desks attached, and with these, students can distribute themselves amongst a room however the teacher wishes, allowing for a more effective student-teacher teaching process.

- The most notable feature of these classrooms, however, is that they can be divided. Shown on the floor plan by dotted lines, there will be sliding glass panels that can, when closed, divide the room as a teacher wishes, enabling them to hold one-on-one sessions or small group lessons, while other lessons are going on on the other side of the partition. (right) Because of the mobility of node chairs and the fact that the walls are whiteboards, teachers will be able to easily customize their classes to maximize the learning of their students. In this way, according to the needs of students, Exceed could have anywhere from two to six classrooms at a time.



- Beyond this hall are four counselor's offices, in the more private area of the building, along with a staff lounge and bathrooms.
- The overall decor is industrial modernist, which employs etched glass (right), dark wooden furniture, and muted colors, often with gallery art or foliage used as accent pieces.



reprogram

We will introduce 3 new programs: college counseling, improved tutoring, and an advisory board.

College counseling: As shown in our research, college counseling is a rapidly growing business in the Silicon Valley, especially as the college admissions process becomes more competitive

COLLEGE COUNSELING

Academic, extracurricular, and career guidance

Selecting colleges that are right for the student

Aiding in the college application process

across the country. We will implement a college counseling program in order to cater to this trend. College counseling will become an integral part of Exceed Education's brand, as we will offer the entire educational package: subject tutoring, test preparation, and college counseling. We will hire former admissions officers to ensure that our students receive the best and most effective advice possible in order to attend the college of their dreams. Exceed Education's college counseling is differentiated by its use of digital tools, personalization of the programs, and dedication to reducing student stress and improving education.

Academic, extracurricular, and career guidance: Students are encouraged to join this service in their freshman year of high school. Exceed Education's college counselors will aid students in identifying possible academic interests and in selecting relevant classes and extracurricular activities. For example, if a student is interested computer science and journalism, the college counselors will describe possible career paths, classes they can pursue in school, and summer programs or internships they can apply to for more exposure. High schools offer hundreds of clubs and classes, and students may become overwhelmed by the choices. Exceed Education's job is to make the process of finding opportunities as easy as possible, a service that aligns with our new brand image of complete personalization of services.

In order to help students put their best foot forward in college applications, Exceed Education will ensure that they pursue the right opportunities at the right time. Our research showed that students are under much stress as they balance difficult classes, exams, extracurriculars, and other time constraints. In order to alleviate these classes, Exceed will help streamline the college application process.

The creation of a database for classes, sports, clubs, summer programs, internships, and other activities will increase the ability to personalize services. In this

manner, when a student comes to Exceed Education, the counselors can easily pinpoint the programs that will suit their profile.

Selecting colleges that are right for the student: When students reach junior year of high school, they will begin the college search process. We will create a database of colleges connected to the Exceed Education website. Each student will have an account on Exceed Education's website, where they will be asked to fill out a questionnaire on their academic profile, academic interests, and school preferences in the categories above.

The database will identify possible matches to the students' profile.

COLLEGE COUNSELING DATABASES

Type	Information Included
Activities	classes • sports • clubs • summer programs • internships • volunteer opportunities • jobs
Colleges	location • size • majors offered • social scene • academic rigor • acceptance rate based on area • financial and merit aid • student organizations • residences • average GPA and test score accepted • student demographics

Aiding in the college application process: After the student selects the colleges, they will be able to access an online calendar with deadlines and reminders for the student. The counselors will periodically edit the students' application essays and will be available to answer any questions on the admissions process. The counselors will also aid in brainstorming essay topic ideas for every prompt. Shown below is an average college counseling schedule for a typical student at Exceed.

FRESHMAN SOPHOMORE JUNIOR SENIOR

CONSULTATIONS

ACADEMIC, EXTRACURRICULAR, AND CAREER GUIDANCE

SELECT COLLEGES

APPLICATION PROCESS

Improved tutoring: A principal complaint amongst Huntington's consumers was that the tutors taught based on their own curriculum and understood neither the students' needs nor their teachers' requirements. This resulted in further education of the student, but no progress in their classes. We will address these complaints in two ways:

1. All tutors will undergo screening in order to ensure that they have the level compassion and dedication necessary to create a welcoming and effective learning environment for Exceed's students.
2. Tutors will be required to work closely with their students to identify their teachers' expectations and testing styles. As Exceed gains more students, tutors will gain more information on various teachers, and will be able to tutor more effectively.

These two new tutoring requirements will allow Exceed to move towards a two-way approach to education, in which Exceed will tutor based on our students' needs, and the students' needs will shape Exceed's tutoring. This will encourage students to attend their classes and stay loyal to Exceed as they build a personal relationship with their tutors. These will add to Exceed Education's brand of personalized services. Students and parents will see that Exceed goes the extra mile to care for and serve its students.

When a student first comes to Exceed, they will have the opportunity to receive a free consultation. In this consultation, the student and/or parents will speak with a tutor or counselor to discuss their wishes regarding their education and in what areas they want to excel. Exceed's tutors and counselors will be trained to show the student their potential, and, above all, have the student leave with a positive mental image of themselves and of Exceed Education.

Pricing: Exceed will offer three programs: college counseling, tutoring, and test preparation. Within college counseling, there are three packages: Silver, Gold, and Platinum. Each package includes access to the college counseling digital tools, guidance, and college selection database. Packages vary in the number of applications the counselor aids in. Exceed's program pricing is detailed in the table on the next page.

PROGRAM

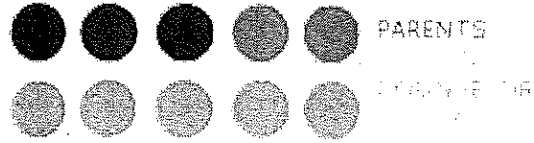
COLLEGE COUNSELING	TUTORING	TEST PREPARATION
<p>Silver package: Complete brainstorming, development, review of applications and essays for:</p> <ul style="list-style-type: none"> • UC and CSU systems • Up to 3 additional colleges or programs • Unlimited meetings based on appointment <p>\$6,000</p>	<p>\$70 per hour, paid at the beginning of each month. Session lengths are flexible.</p>	<p>\$90 per hour, paid at the beginning of each month. Test preparation materials are provided and session lengths are flexible.</p>
<p>Gold package: Complete brainstorming, development, review of applications and essays for:</p> <ul style="list-style-type: none"> • UC and CSU systems • Up to 6 additional colleges or programs • Unlimited meetings based on appointment <p>\$8,000</p>	<p>Customers may opt to register for two out of three programs, receiving an overall 5% discount. They may also register for all three programs, receiving a 10% overall discount.</p>	
<p>Platinum package: Complete brainstorming, development, review of applications and essays for:</p> <ul style="list-style-type: none"> • UC and CSU systems • Up to 8 additional colleges or programs • Unlimited meetings based on appointment <p>\$10,000</p>	<p>Each package offered includes access to the online Exceed Portal, with the personal calendar. Counseling packages include complementary college database programs within the Portal. Tutoring and test preparation packages include access to the Skymap.</p>	

Exceed's pricing is based on both that of Huntington Learning Center and the average local price range, shown in the table below. The programs are generally in the higher end of the average price range to assert the quality of Exceed's programs, save for test preparation, which is not offered one-on-one in any other center in the area.

PRICING COMPARISONS

	EXCEED EDUCATION	HUNTINGTON LEARNING CENTER	AVERAGE LOCAL PRICE RANGE
Tutoring	\$70/hour	\$70/hour	\$50-80 per hour
Test preparation	\$90/hour (one-on-one)	\$90/hour (one-on-one)	\$50-70 per hour (group classes)
College counseling	\$8,000/package	N/A	\$5,000-\$12,000 per package

Advisory board: Our surveys and interviews indicated that Huntington Learning Center's



parents wish to become more involved in the supplementary education of their children. At Exceed Education, education will be a dynamic process, constantly changing with the needs of our students and their educational environments. We created an advisory board consisting of parents, students, tutors, and counselors. The board will meet once a month to discuss possible improvements to Exceed Education's current operations. Students and parents can inform members of the advisory board of their wishes or complaints, and will be able to see results happen in real time. This will increase Exceed Education's customer satisfaction and loyalty, as parents, part of our new target market, will see that Exceed Education truly tailors its programs to their children's needs. Students will see Exceed's dedication to staying ahead of the game and up to date with current trends.

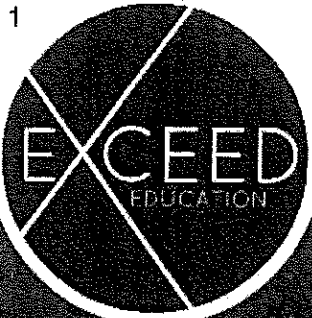
rewire

We will also make Exceed Education more targeted towards high school students by integrating technology into our tutoring services. The main way we will do so is by completely redesigning our current Huntington website into an interactive user portal, with several features that complement our educational services and will enhance the customer experience. The new website design is more minimalist in appearance, which has been proven to be more appealing to teenagers. The website design reflects Exceed Education's brand as modern in education, and is up-to-date with current trends in design such as a flat user interface, and grid layouts. We will hire the company Hot Dot Productions to design and maintain our website, as they are experts in the web design trends and creating a memorable user experience. The redesigned website pages are shown in the next few pages, ordered as follows:

1. The home page is redesigned to be more intuitive and appealing.

2. All students will have access to a personalized portal that is jointly run by them and their counselor. The portal displays basic information about the student, and is linked to School Loop, a website currently used by local schools to display grades and homework.
3. The personal calendar is the first of many personal windows that are accessible from the sidebar. This calendar is a life organization tool that recognizes the incredibly stressful time children have as they try to balance school, extracurriculars, and other commitments.
4. The College window is only accessible to those who are part of our College Counseling program. It is linked to The Common Application, which is the official college application organization, to provide data and statistics on all colleges that our students are interested in. In addition, the portal organizes the students' applications and deadlines.
5. In order to track our students' progress, we will implement a program called the Skymap. The Skymap is an interactive online tool used to track each student's progress in school and in the college application process. Each respective continent on this map of the Earth is designated a subject, and there are pathways digitally linking assignments input by the counselor/tutor that route to goals. By using the Skymap, students can directly see their progress, and be motivated to continue. We will have an incentive program, in which students will receive \$1000 for completing 5 separate Skymap paths, set by our staff members.

1



GRADUATION ISN'T
JUST A GOODBYE,
IT'S A STEP INTO
THE FUTURE.

MAKE THAT STEP
COUNT WITH
EXCEED.

FIND OUT HOW TO
EXCEED YOURSELF
TODAY

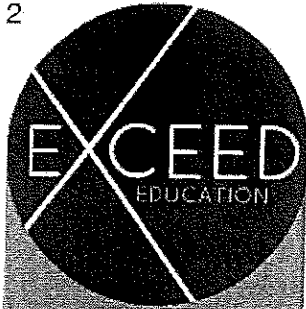
ABOUT US PROGRAMS IMPORTANT DATES CONTACT LOG IN



CALL 1 800 2 EXCEED TODAY FOR A FREE CONSULTATION



2



- MY CALENDAR
- MY COLLEGES
- CONTACT MY COUNSELOR
- SKYMAP

Welcome, Jonathan Phua

DEADLINES

HOMEWORK *via Monta Vista School Loop*
 Physiology Lab
 Read Cal's Cradle Ch 20 SEE FULL

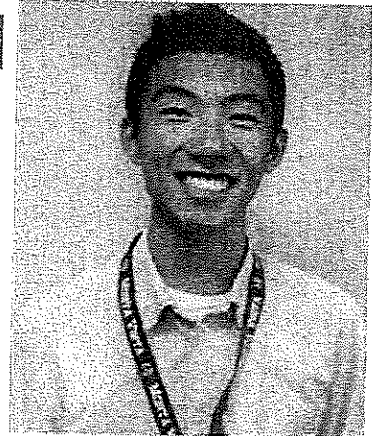
APPLICATIONS
 Prepare for USC Interview
 Send in UW App for edits SEE FULL

UPCOMING DATES
 NYU Interview - 3 days
 Duke Interview - 5 days SEE FULL

NEXT MEETING ON 5/8/14

CURRENT COURSEWORK
 Contemporary Literature
 Physiology
 AP Psychology
 AP Statistics
 US Government

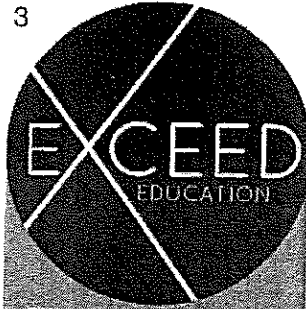
EXTRACURRICULARS
 Key Club **PRESIDENT**
 Water Polo **VARSITY**



MONTA VISTA HIGH SCHOOL
Cupertino, CA

Grad Date 2014
 GPA 3.78
 SAT 2090

3



- MY CALENDAR
- MY COLLEGES
- CONTACT MY COUNSELOR
- SKYMAP

Welcome, Jonathan Phua

MON FEB 3	TUE FEB 4	WED FEB 5	THU FEB 6
7:30AM - 12:45 PM SCHOOL 2PM - 5:30PM - Water Polo HOMEWORK Physiology Lab Read Cal's Cradle Ch 20 Psychology Workbook Pg 79 Statistics Graph Problems APPLICATIONS Prepare for USC Interview Send in UW App for edits OTHER Prepare for NYU Interview Thursday	7:30AM - 12:45 PM SCHOOL 2PM - 5:30PM - Water Polo 6:30PM - 7:30 PM USC Interview HOMEWORK Give Presentation tomorrow Read Cal's Cradle Ch 21 Psychology Text tomorrow Physiology reflection APPLICATIONS Prepare for NYU Interview	7:30AM - 12:45 PM SCHOOL Give Presentation Psychology Text 2PM - 5:30PM - Water Polo HOMEWORK Statistics Workbook Read Cal's Cradle Ch 22 Psychology Lab Government Essay APPLICATIONS Prepare for NYU Interview Begin applying for Financial Aid OTHER Anna's birthday tomorrow	7:30AM - 12:45 PM SCHOOL 2PM - 5:30PM - Water Polo 6:30PM - 7:30PM NYU Interview HOMEWORK Statistics Workbook pg 84 Read Cal's Cradle Ch 23 Psychology Workbook APPLICATIONS Finish Form of Aid App Send in Overall App for edits OTHER Had DNA testing tomorrow See Alaska bill for candy tomorrow
MON FEB 3 - SUN FEB 16 Mon Feb 10 - Sun Feb 16 MONTHLY VIEW			

File Name

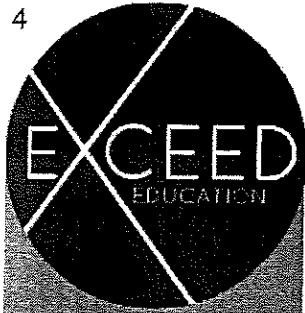
Description

SUBMIT FILE

Course	Grade (%)
Contemporary Literature	90
Physiology	82
AP Psychology	79
AP Statistics	89
US Government	95

VIEW GRADE TRENDS

4



Welcome, Jonathan Phua

MY CALENDAR

MY COLLEGES

CONTACT MY COUNSELOR

SKYMAP

University of Southern California
 New York University
 UC Los Angeles
 Duke University
 Drexel University

UNIVERSITY OF SOUTHERN CALIFORNIA
 Location: Los Angeles, CA Undergraduate Population: 17,619



FAST FACTS
 20% applicants admitted
 3.72 average GPA
 2080 average SAT
 \$59,883 total cost
 \$26,979 average aid
 73% students receiving aid
 97% retention rate

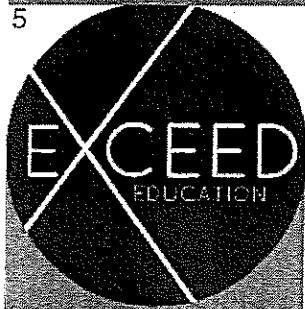
How do I match up?

Major and Programs Offered

UNIVERSITY OF SOUTHERN CALIFORNIA via the Common Application

Questions	COMPLETE
Assign Recommenders	COMPLETE
Preview and Submit - Common Application	COMPLETE
Writing Supplements	IN PROGRESS
Preview and Submit - Writing Supplement	INCOMPLETE

5



Welcome, Jonathan Phua

MY CALENDAR

MY COLLEGES

CONTACT MY COUNSELOR

SKYMAP

The SkyMap interface displays a world map with various subject categories overlaid. The categories include Literature and Writing, Mathematics, Sciences, World Languages, Social Studies, and SAT/ACT. The skyman logo is visible in the bottom right corner.

promotion

Our promotional plan is an integral part of our rebranding initiative. DELTA revolutionizes Huntington into Exceed Education, but without promotion, these changes will be futile. Our research shows that it is becoming more difficult to catch the attention of the market, but Exceed's will be more effective in communicating with consumers. These promotional tactics will target students and parents in alignment with our change in target market.

TYPE OF PROMOTION

AWARENESS:

These methods are designed to increase Exceed's brand recognition

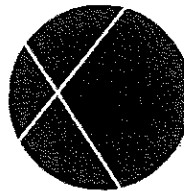
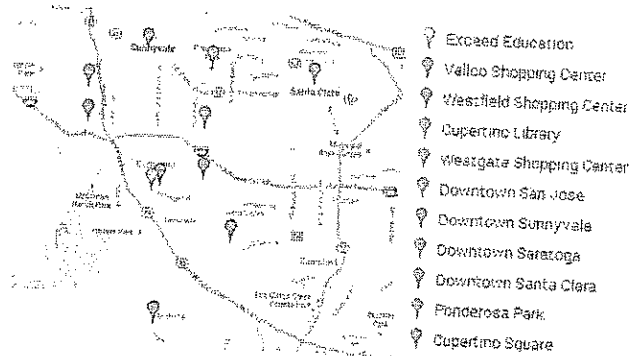
- Lenticular posters
- Coffee cup promotion
- Social media

MESSAGE:

These methods are designed to spread Exceed's mission

- Chalkboards
- Escalator and elevator promotion

Posters: In order to make the logo of Exceed Education more recognized, we will use lenticular imaging, which are images that change when viewed from different angles. Large lenticular circles will be plastered on the walls of the ten most popular local sites. The circles will transition from a blank to whole logo (right). The advertisement will catch the eye of passerby's as they notice the movement. The minimalist advertisement is a contrast to the bombardment of commercials and brochures that Huntington currently distributes.



Word-of-mouth: Word of mouth has been proven to be the most effective method as shown in our surveys. We will catalyze word of mouth promotion of Exceed Education by offering discounts. For every person that a parent or student refers that enrolls in one of our programs, the referrer will receive a 5% discount. The opportunity cost of the discount will be countered by the profit from new customers, and the reputation that Exceed Education will gain in the community. This will be a large contrast to Exceed Education's lack of recognition.

Social media accounts and competitions: In order to reach out to students more and project Exceed Education as a progressive company, Exceed will create social media accounts and hold competitions. Our research showed that 95% of students, with a 3% margin of error, use either Facebook, Twitter, Instagram, or a combination of the three. Creating accounts on these three social networks will instigate a more

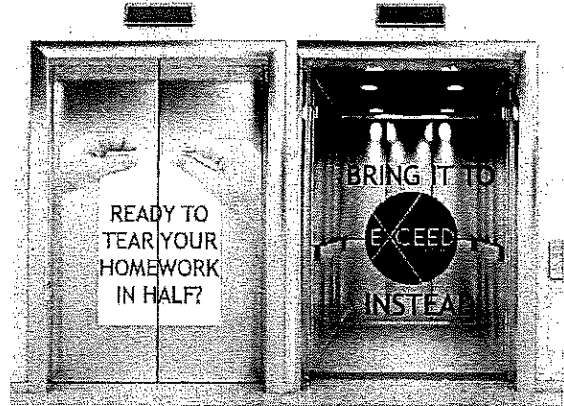
widespread reputation for Exceed Education. In order to increase Exceed's online network, Exceed will hold social media competitions. If students follow Exceed's account and retweet, repost, or share an image that Exceed posts and hashtags #ExceedYourself, they will be eligible to win a prize. Potential prizes include MacBooks, iPads, college dorm furniture, and discounts on Exceed Education's programs.



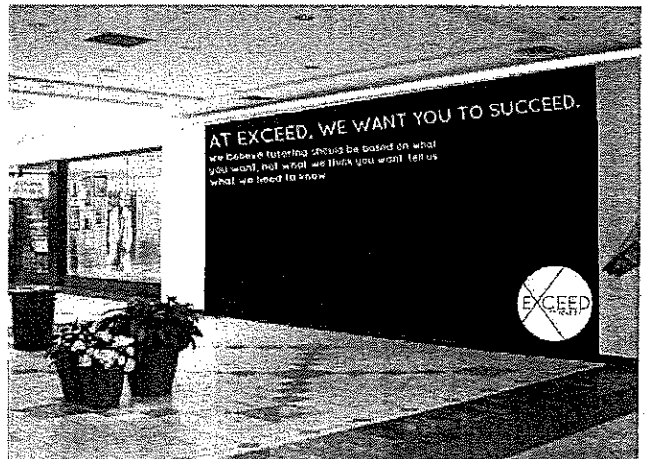
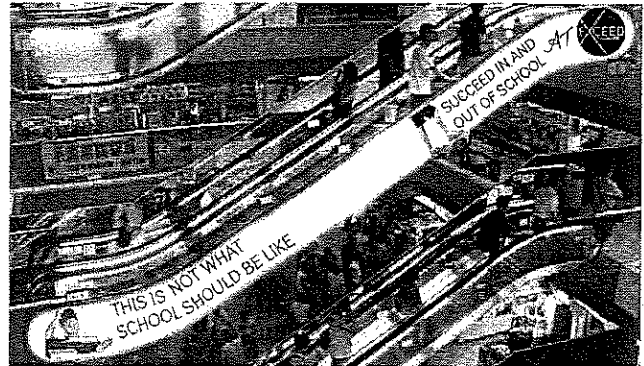
Mall guerrilla marketing advertisements: Guerrilla marketing employs the element of surprise,

attracting and entertaining customers in unconventional ways. We will utilize this strategy in the local Cupertino Square, Valley Fair, and Santana Row shopping centers.

Elevator and escalator: We will place posters on elevator and escalators to advertise to consumers in a guerilla-style manner. On elevators and escalators, we will place posters such as those to the left and on the next page.



Chalkboard: In order to convey that Exceed Education is all about personalization, we will place chalkboard murals in the interior of shopping complexes, which passerby's can write on. Our research shows that students and parents in the community are dissatisfied with Huntington and other tutoring centers due to its incongruence with school curriculum. The chalkboard mural will be available for members of the community to write their complaints and desires on.



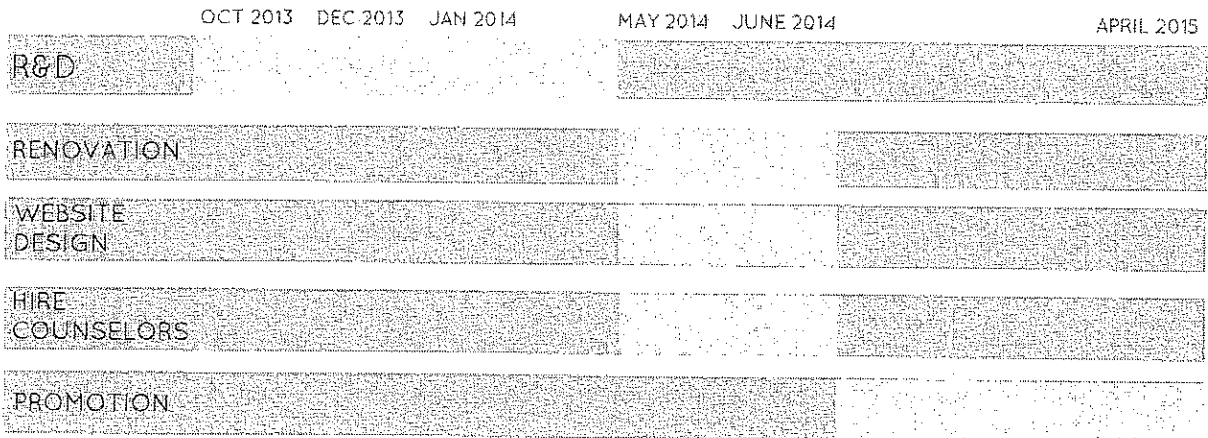
Having the chalkboard will project the image that Exceed Education tailors its curricula and program to the needs of its customers, which is a large contrast and differentiating factor from its competitors.

Coffee cups: We will also be pairing up with the following local stores that sell hot drinks: Tpumps, Starbucks, Panera, Peet's Coffee and Tea, Chromatic Coffee, and Coffee Society. These stores were chosen because they are frequented by students and parents. On every hot drink cup, the Exceed logo will be printed on the bottom, so when people lift the cup to their mouth to drink through the lid, the bottom of the cup with the Exceed logo will be displayed to everyone around the customer.



An overall timeline of DELTA is shown below. The grand opening of Exceed Education is projected to be May 2015.

OVERALL DELTA TIMELINE



VI. PROPOSED BUDGET

A. Costs associated with proposed rebranding strategies

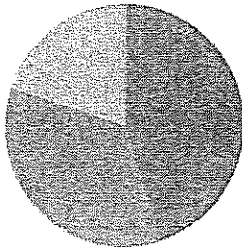
In order to implement DELTA, we are asking for \$1,300,000 to cover DELTA's promotional and college counseling expenses. Our expenses are divided up into two main categories: sales and administrative expenses, and facility expenses. The return on investment will be 199.84%. Our projected revenue is based on predicted customer base increases from our promotional methods. The projected expenses are based on current tutor, manager, and counselor salaries.

EXCEED EDUCATION | Exceed Yourself

INCOME STATEMENT FOR THE YEAR ENDED MAY 2020						
	May 2016	May 2017	May 2018	May 2019	May 2020	Total
Revenue						
Tutoring	\$705,600	\$846,720	\$1,128,960	\$1,128,960	\$1,128,960	\$4,939,200
Test preparation	\$388,800	\$518,400	\$518,400	\$648,000	\$648,000	\$2,721,600
College counseling						
Silver	\$324,000	\$282,000	\$312,000	\$348,000	\$372,000	\$1,638,000
Gold	\$336,000	\$288,000	\$328,000	\$352,000	\$400,000	\$1,704,000
Platinum	\$240,000	\$210,000	\$230,000	\$260,000	\$280,000	\$1,220,000
Total counseling revenue	\$900,000	\$780,000	\$870,000	\$960,000	\$1,052,000	\$4,562,000
Total revenue	\$1,994,400	\$2,145,120	\$2,517,360	\$2,736,960	\$2,828,960	\$12,222,600
Expenses						
Sales & Administrative Expenses						
Salary & Wages						
Manager's Salary	\$169,000	\$169,000	\$169,000	\$169,000	\$169,000	\$845,000
Tutor's Salaries	\$225,000	\$270,000	\$360,000	\$360,000	\$360,000	\$1,575,000
Counselors' Salaries	\$390,000	\$390,000	\$435,000	\$465,000	\$526,000	\$2,206,000
Tech Support	\$16,000	\$16,000	\$16,000	\$16,000	\$16,000	\$80,000
Total Salary and Wages	\$800,000	\$845,000	\$980,000	\$1,010,000	\$1,071,000	\$4,706,000
Marketing Expenses						
Guerilla marketing and lenticular posters	\$15,000	\$1,000	\$1,000	\$1,000	\$1,000	\$19,000
Coffee cups	\$1,000	0	0	0	0	\$1,000
Total Marketing Expenses	\$16,000	\$1,000	\$1,000	\$1,000	\$1,000	\$20,000
Total Sales & Administrative Expenses	\$816,000	\$846,000	\$981,000	\$1,011,000	\$1,072,000	\$4,726,000
Facility Expenses						
Upkeep Expenses						
Utilities	\$2,320	\$2,320	\$2,320	\$2,320	\$2,320	\$11,600
Educational Supplies	\$800	\$800	\$800	\$800	\$800	\$4,000
Total Upkeep Expenses	\$3,120	\$3,120	\$3,120	\$3,120	\$3,120	\$15,600
Renovation Expenses	\$714,000	\$0	\$0	\$0	\$0	\$714,000
Total Facility Expenses	\$717,120	\$3,120	\$3,120	\$3,120	\$3,120	\$729,600
Total Expenses	\$1,533,120	\$849,120	\$984,120	\$1,014,120	\$1,075,120	\$5,455,600
Total Income	\$461,280	\$1,296,000	\$1,533,240	\$1,722,840	\$1,753,840	\$6,767,200
Corporate Tax	\$195,582.72	\$549,504	\$650,093.76	\$730,484.16	\$743,628.16	-
Net Income	\$265,697.28	\$746,496	\$883,146.24	\$992,355.84	\$1,010,211.84	\$3,897,907.20
ROI	13.63%	38.27%	45.28%	50.88%	51.78%	199.84%

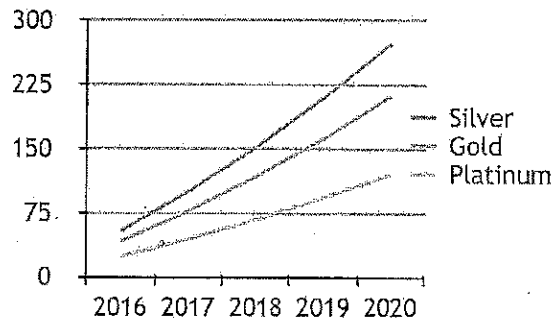
B. Proposed metrics to measure return on investment (ROI)

PROPORTION OF STUDENT ENROLLMENT



- Silver
- Gold
- Platinum

ENROLLMENT IN COLLEGE COUNSELING



We predict a 1% increase in students enrolled in college counseling programs each year based on our surveys, and a 3% increase in Exceed Education's market share, beginning at 4% after our rebranding initiative is implemented. We used these statistics to calculate our revenue from college counseling, tutoring, and test preparation.

In order to measure return on investment, we will have new customers indicate how they originally found out about Exceed Education. In this manner, we will be able to track conversion rates for the various forms of promotion. We will also be able to determine the number of sales that would have taken place without the rebranding plan.

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VIII. APPENDIX

Shown below are our projected revenue streams and rationale for our financial projections until May 2020.

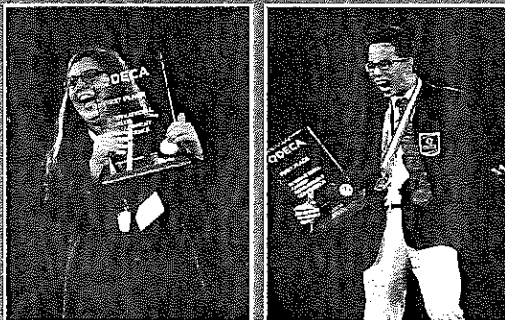
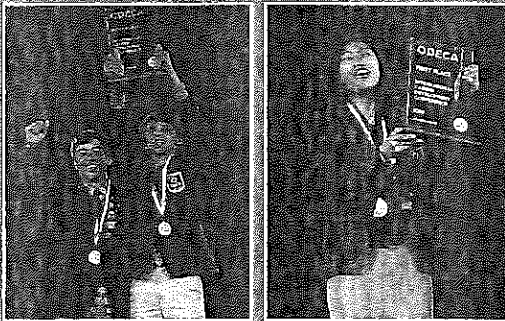
	Year Ended May 2016	Year Ended May 2017	Year Ended May 2018	Year Ended May 2019	Year Ended May 2020
Tutors employed	5	6	6	8	8
Fee per hour	70	70	70	70	70
Hours tutored per day	7	7	7	7	7
Days tutored per week	6	6	6	6	6
Weeks tutored per month	4	4	4	4	4
Months tutored per year	12	12	12	12	12
Total revenue	\$705600	\$846720	\$1128960	\$1128960	\$1128960

	Year Ended May 2016	Year Ended May 2017	Year Ended May 2018	Year Ended May 2019	Year Ended May 2020
Students in area	20000	20000	20000	20000	20000
Percentage of students enrolled in college counseling programs	16%	16%	17%	18%	19%
Number of students enrolled in college counseling programs	3000	3200	3400	3600	3800
Percentage of students enrolled in college counseling programs at Exceed Education	4%	7%	10%	13%	18%
Number of students enrolled in college counseling programs at Exceed Education	120	224	340	468	608
Number of new students enrolling in college counseling programs at Exceed Education	120	104	116	128	140
Percentage of students enrolled in Exceed's Silver Package	45%	45%	45%	45%	45%
Number of students enrolled in Exceed's Silver Package	54	101	153	211	274
Number of new students enrolled in Exceed's Silver Package	54	47	52	58	62
Revenue from Silver Package students (\$6,000 per package)	\$324000	\$282000	\$312000	\$348000	\$378000
Percentage of students enrolled in Exceed's Gold Package	36%	35%	35%	35%	35%
Number of students enrolled in Exceed's Gold Package	42	78	119	163	213
Number of new students enrolled in Exceed's Gold Package	42	36	41	44	50
Revenue from Gold Package students (\$8,000 per package)	\$336000	\$288000	\$328000	\$352000	\$400000
Percentage of students enrolled in Exceed's Platinum Package	20%	20%	20%	20%	20%
Number of students enrolled in Exceed's Platinum Package	24	45	88	94	121
Number of new students enrolled in Exceed's Platinum Package	24	21	23	26	28
Revenue from Platinum Package students (\$10,000 per package)	\$240000	\$210000	\$230000	\$260000	\$280000

	Year Ended May 2016	Year Ended May 2017	Year Ended May 2018	Year Ended May 2019	Year Ended May 2020
Number of tutors	3	4	4	5	5
Fee per hour	90	90	90	90	90
Hours worked per day	5	5	5	5	5
Days worked per week	6	6	6	6	6
Weeks worked per month	4	4	4	4	4
Months worked per year	12	12	12	12	12
Total revenue	\$388800	\$518400	\$518400	\$648000	\$648000

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MARSHALL
DRAGS

Business Services Operations Research Event
Marshall Memorial Municipal Airport

Marshall High School
Saline County Career Center DECA
805 S. Miami St, Marshall, MO 65340

Isaac Barr
Alex Jones
27 April 2015

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I. EXECUTIVE SUMMARY

The Marshall airport is an integral part of the community. They have become a hub for attraction and recreation with their newly constructed Martin Community Center. The dilemma they are facing is attracting clients to their facility. The current target market is confined to only agricultural consumers for crop disease prevention and *Baby Boomers* and *Generation X* members who use the facility for recreational purposes.

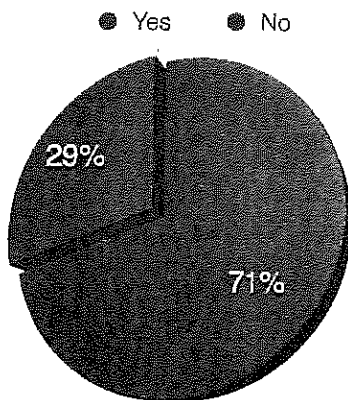
Goal-

The goal we are trying to achieve is to attract a new target market to the Marshall Memorial Municipal Airport. The airport does not currently serve Marshall's largest demographic, *Generation Y*. Therefore, we propose the airport find an event that will attract this generation.

Proposed Event-

Our proposed event consists of two components: a car show and a drag racing event to be held at Marshall Memorial Municipal Airport in July of 2015. This event is focused on attracting *Generation Y*. With little to no recreational activities in Marshall for this demographic, an event, such as the one being suggested, will open up opportunities not only for the desired target market, but also for local businesses to promote themselves in providing the town's largest generational group with an enjoyable opportunity.

Generation Y Interest in
Proposed Event
(Survey of 165 Students)



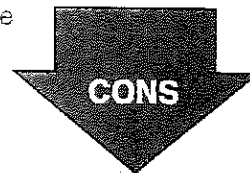
Key Findings-

When conducting research regarding the event, we found that there was significant interest, and that many benefits to local businesses and the airport would result.



- Provide airport with additional revenue stream
- Bring in new target market of Gen. Y
- Advertise for current businesses
- Support local businesses

- Next to a neighborhood
- Safety concern
- Possible runway damage



Budget-

The idea we are proposing, with income of \$43,815 and expense of \$17,815, will yield a net profit of \$26,000.

II. INTRODUCTION

A. Description of the business or organization

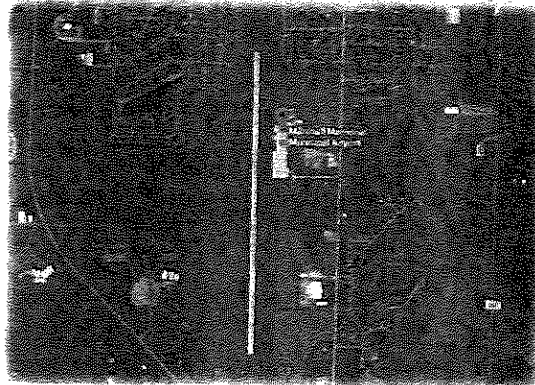
The Marshall Memorial Municipal Airport sits on 225 acres of land in the small farming community of Marshall, Missouri. The airport, established in 1941, provides the local community of Marshall with a location for aerial recreation, and agricultural air services such as crop dusting. The local military base also uses the airport.

The airport has one concrete runway that is 5,000 feet long by 75 feet wide. A second turf runway measures 3320 feet by 150 feet. The facility contains 19 hangers, 10 aircraft tie-downs, and a centralized office. The airport is open from 7 am to 6 pm from March through November, then shortens its hours from 7 am to 5 pm for the remaining months. In the past year, the airport has made capital improvements, such as lengthening the runway, overlaying it with concrete, adding lighting, and making new runway markings.

The airport's business is relatively slow, which is reflective of our town's economical state. There are only 24 aircrafts based on the field and the airport only has an average of 105 aircraft operations a week. The airport's business is divided up as follows: 56% for general local uses (such as crop dusting), 37% for transit purposes, 6% for air taxi, and the remaining percentage is used for military purposes.



*Marshall Memorial Municipal Airport
Marshall, Missouri*



Aerial view of the Marshall Airport

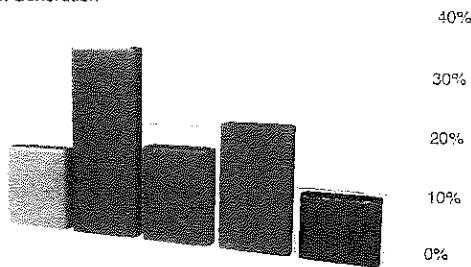
B. Description of the community

Demographics

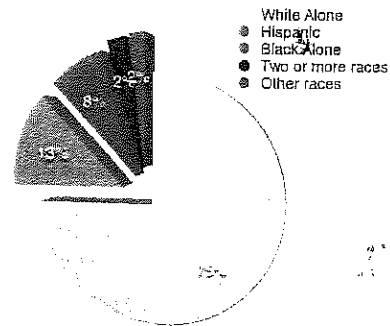
As of the 2010 census, the population of Marshall is 13,065. The median age in Marshall is 32.9 years old. The racial makeup of Marshall is significantly different than most cities of similar size in Missouri. We have a large Hispanic population of 13.2%, compared to the state average of 3.5%. The large influx of Hispanics is due to the food processing plants located here.

- Generation Z
- Generation Y
- Generation X
- Baby Boomers
- Silent Generation

Generational Percentage of the Population



Racial Population Percentage



Geographic

Marshall is located in the heartland of Missouri. Marshall, being the largest city in Saline County, is the county seat. Visitors pass through daily using US Highway 65. An interstate junction sits just 10 miles north of Marshall which helps bring in visitors as well. Marshall is surrounded by agriculture. Many local residents also have a passion for automotive. Numerous racing circuits surround Marshall, but only one registered 1/4 mile drag strip exists in Missouri.

Economics

The average income per household in Marshall is \$34,995 as of 2012. That is significantly lower than the average Missouri household income of \$45,321. Marshall's unemployment rate of 6.5% is nearly one whole percent lower than the Missouri average. Marshall is mainly an agricultural community with a large percentage of cash flow coming from crops, livestock, and other agricultural assets. Many agriculture businesses are based here, including Conagra and Cargill. Other major employers are Missouri Valley College and Marshall Public Schools.

Socioeconomics

Nearly 20% of Marshall Citizens that are over 25 years of age do not have a high school degree. This is 7% more than the state average. Twenty-four percent of the population lives below the poverty level. The socioeconomic strife can be seen by the free and reduced lunch rate at our local public schools of 62.9%.

C. Overview of the business or organization's current target market

The Marshall Memorial Municipal Airport segments their target market using several different categories as shown below.

Geographic segmentation

Being surrounded by larger cities masks the fact that this small centralized town has a high quality airport. There are two major airports on either side of Saline County. The Kansas City International Airport is located 107 miles west of Saline County, while the Lambert International Airport in St. Louis is 172 miles east.

Saline County contains some of the most sought-after farmland in the country. The fertile soil sits on relatively flat ground and is a prime and profitable location for planting corn, soybeans, and wheat. The large amount of farming in the community makes crop dusting a necessity, and is where the airport gets most of its business.

Saline County is exposed to all four seasons. November through March are very barren months for the airport, due to the region's climate that consists of possible sub-zero temperature and heavy snowfall. The busiest times for airport traffic are April through October.

Psychographic segmentation

The airport is psychographically segmented by aviation fans, farmers, military men and women, and crop dusters. People who like to fly as a hobby or as a career are some of the main customers of the airport. Other customers include those who are learning to fly.

Being located in the heartland of America, the farming market is very dominant. The agricultural clientele is one of the airport's biggest consumers during the spring and late summer season. During this time, crop-dusters are busy fertilizing and spraying weeds.

During the summer, more recreational clients use the facility for land photography, transportation, or just sight-seeing ventures. A small percentage of customers are business travelers who need to fly to a nearby destination.

Demographic segmentation

The airport targets mainly the *Baby Boomers* generation and older. This consists of customers born from 1946 - 1964. The airport clientele are of three distinct categories:

- 1) White males, who are highly educated, with high incomes
- 2) White males who farm for a living, mid-income range, high school or some college education
- 3) Military

Recreational, agricultural, and military tasks are the only real services being provided to airport clients.

After studying the current target market of Marshall's airport, we determined that they currently do not serve the majority of the local population. Current customers are from the Baby Boom generation, which only account for 2,688 of local residents. There is a large, untapped market of potential customers. As a result, we introduced the idea of drag racing to Marshall and the surrounding communities. There is not any event like drag racing around. The closest thing is a dirt track in Sweet Springs, Missouri racing small motorized vehicles. The drag racing idea would bring something new to our community that is need of attracting citizens.

To reach the largest market segment, Generation Y, which includes 4,205 local residents, we are proposing that the airport hold a series of drag racing events. For research we used surveys and a focus group to determine the generational dilemmas and interest in our proposed event. We then conducted several interviews to learn the airport's perspective on their condition and also to learn from an organization that does this event annually. We found that both *Generation Y* and the Marshall Airport itself feels that it is in need of some marketing assistance. The research also proved that the Marshall Drags would be a perfect solution to the inactive airport.

III. RESEARCH METHODS USED IN STUDY

A. Description and rationale of research methodologies selected to conduct the research study

To determine if the airport could attract a new generational group, Generation Y, we developed a research study consisting of multiple methods. These methods include both primary and secondary research. Our primary research included surveys, observations, a focus group, and interviews. Secondary research includes information from airnav.com and the city of Marshall website.

Quantitative Research Methods:

According to sagepub.com, quantitative research is explaining phenomena by collecting numerical data that is analyzed using mathematically based methods. We decided to conduct a survey to give to people who belong to Generation Y, asking them for their opinions regarding our idea of drag racing at the airport.

Qualitative Research Methods:

The Data Collector's Field Guide states that qualitative research methods seek to understand a given research problem or topic from the perspectives of the local population it involves. To gather information about the airport, we interviewed the manager of the airport, Bill Anderson. We also interviewed an airport executive in North Dakota that has dealt with airport drag races before. He provided us with a full detailed budget and airport regulations for the event to occur.

Another qualitative method used was observations. We visited the airport and took pictures of the activities that were happening. We also used our prior knowledge of the airport, since we are both life-long residents of Marshall.

B. Process used to conduct the selected research methods

A recap of our qualitative and quantitative research methods are shown in the chart below:

Student Survey	A survey was a very important part of our research. We surveyed students belonging to <i>Generation Y</i> to determine their interest in a drag racing event at the airport. This allowed us to make a prediction as to whether or not people would attend and/or participate in the event.
Focus Group	The focus group consisted of nine students from <i>Generation Y</i> , and was held at the Saline County Career Center. The goal of the focus group was to find the potential customer's interest in a drag racing event, and to brainstorm ideas that could ensure a successful event. The focus group contained male and female students from different ethnic and social groups.
Interview- Airport Manager in Marshall, MO	Interviewing the manager of the Marshall Memorial Municipal Airport allowed us to obtain information about the airport facilities, develop a better understanding of the current target market, and helped resolve any problems regarding information.
Interview- Airport Drag Racing Coordinator in Jamestown, ND	The interview with the event coordinator in North Dakota enlightened us about the rules and requirements that need to be met for the use of the airport. Also, the entire budget for the event was provided, which helped us tremendously on figuring out the projected expenses and profit.
Airnav.com	<i>Airnav.com</i> allowed us to obtain information about the airport, such as the exact size of the airport, airport regulations, specific consumer statistics, and any other information about aerial related businesses.
Marshall-mo.com	The city of Marshall's webpage allowed us to gather information about the town's demographics, geographics, and socioeconomic factors.

Research Timeline

SEPT 2014 OCT 2014 NOV 2014 DEC 2014 JAN 2015

Secondary Research

Survey

Local Airport Interview

Focus Group

Drag Racing Airport Organization Interview

Surveys-

For our surveys, we designed a small template to keep the survey simple and to reach all of our desired respondents. We dispersed 165 surveys in order to reach students from every grade level to achieve a better result. Over fifty students were surveyed from each class, freshman through senior. The questions we asked can be seen below.

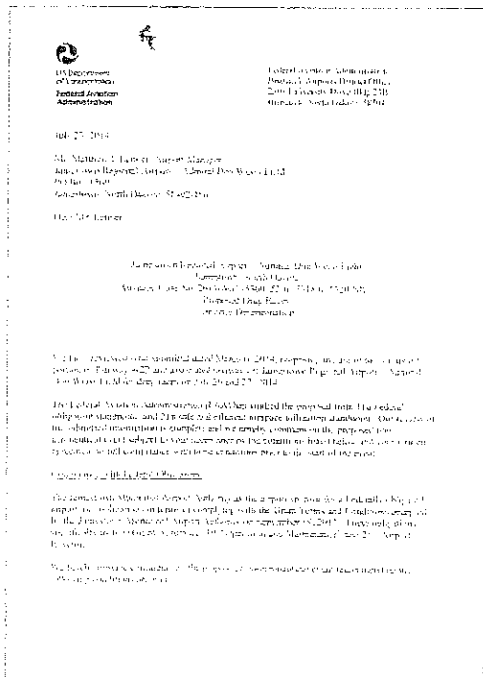
Marshall Airstrip Drags	The Marshall Airstrip Drags is an event where the Marshall Airport will shut down and allow the public to participate in an organized drag race and car show event one day out of the year. No restrictions on what type of cars can enter.
Have you ever participated in a drag event? _____	
Would you participate in this event? _____	
How much would you want to pay to participate? _____	

Interviews-

We conducted an interview with Bill Anderson, the manager of the Marshall Airport. We chose to interview Mr. Anderson because of his vast general knowledge about the airport and all aerial operations. We set up an interview on December 9, 2014 at 11:30 am. In the interview we asked him the following questions:

- How are you currently promoting the airport?
- Who do you consider your current target market?
- How often is your facility used and whom by?
- What are the main strengths and weaknesses of the airport?
- Would you be interested in finding a different use for your facility?

We then held another interview with a member of the Jamestown Drag Racing Association. This particular person actually helps deal with an annually held airport drag racing event at their airport. We made contact with this person on January 6, 2015 through January 17, 2015. We acquired both an in-depth budget of the event and airport regulations and restrictions from this executive.



JAMESTOWN DRAG RACING ASSOCIATION	
Profit and Loss	
January through December 2014	
Jan - Dec '14	
Operating Income/Expenses	
Income:	
BUFFALO CITY TOURISM FOUNDATION	2,033.00
CHICKENHAW REDEFINER	1,708.00
FOOD VENDORS	1,500.00
DATE FEES	
SATURDAY	4,852.85
SUNDAY	3,244.99
GATE FEES - Door	158.75
Total DATE FEES	8,256.60
REGISTERED RACER	
EDDY BROS	8,023.00
SATURDAY ONLY	1,260.00
SUNDAY ONLY	1,410.00
Total REGISTERED RACER	10,693.00
SPONSORSHIP	
BURNERS CARD	1,075.00
JR. BUSINESS CARD	225.85
JR. TRIPHS	44.85
LAKE TROPHIES	2,000.00
BIKES 11 CYCLE SPONSOR	1,100.00
BIKES 15 SPONSOR	2,440.00
TROPHIES	1,880.00
SPONSORSHIP	200.00
Total SPONSORSHIP	13,140.85
TROPHIES	180.00
VENDOR	200.00
Total VENDOR	380.00
Total Income	42,873.45
Expenses:	
ADVERTISING	
BURNERS & SCOP	275.20
BUSINESS CARD	2,280.85
POSTAGE	765.95
RADIO ADS	3,985.00
STAFF TRAVEL	254.75
WEBSITE	471.80
Total ADVERTISING	7,772.75
AMBULANCE SERVICE	1,820.75
ARRANGERS	700.00
CASHIERS REACTION TIME	300.00
COMMITTEE PURCHASE	14.11
Garment Rental	1,481.22
GUY JAMES RACING ASSOCIATION	100.00
Insurance	2,227.00
JAMESTOWN RACING ASSOCIATION	2,800.00
Manitowish	
CASHIERS FOR RACERS	1,200.00
CHICKENHAW TROPHIES	125.87
PHOTOGRAPHS	164.37
POSTER/BIKES/TROPHY SHOWS	164.80
RACE SUPPLIES	144.00
TROPHY COMPASS SUPPLIES	1,263.47
Total Manutenance	4,464.44
NON-PROFIT FUND	10.00
Printer and Delivery	113.44
Printing and Administration	121.11

Focus Groups-

For the focus group, 9 students were randomly chosen from the advanced marketing class at the Saline County Career Center. These students were chosen because they are all members of the generation we plan to target, Generation Y, and they also have marketing knowledge that could potentially be beneficial to our project. The students were from different ethnic groups, different social groups, and consisted of nearly half males and half females. The focus group was very successful. To start, we showed the members a video off of YouTube that is very similar to our idea. This gave everyone the overall idea of what we were trying to achieve. We then asked several questions, as seen below:

- If you could describe the airport in a few words, what would you say?
- What are your thoughts about our proposed project, both the pros and cons?
- What are some things that people in your generation do now for entertainment?
- Have any of you ever been to the Marshall Memorial Municipal Airport?
- Can you describe your overall thought of our project in one sentence?

Secondary Research-

Secondary research was used by searching google for the Marshall Memorial Municipal Airport which led us to the airnav.com website. From this website, we were able to get detailed information we needed about the airport. Secondly we searched for statistics on the city of Marshall and that led us to the city data website which gave us plenty of specific information about Marshall.

IV. FINDINGS AND CONCLUSIONS OF THE STUDY

A. Findings of the Research Study

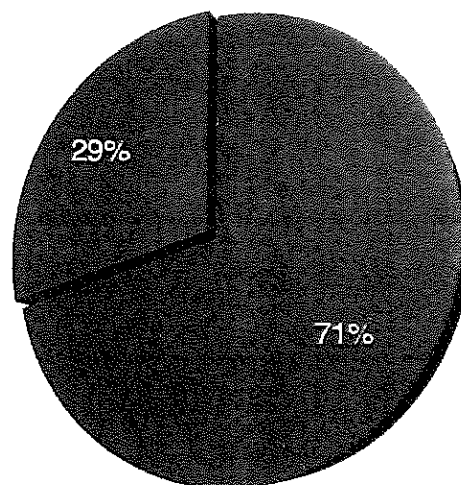
Surveys-

The first question in our survey asked, "Have you ever participated in a Drag event?" An overwhelming 97% of the students in *Generation Y* we surveyed replied no. This means that we are bringing something new into Marshall and the surrounding communities.

The second question in the survey stated, "Would you participate in this event?" The majority of the people we surveyed replied yes. The results are shown in the graph below. There are 4,205 people in Marshall that are in *Generation Y* and if the same ratio we received off of the results from the survey apply to the whole population we can anticipate a successful turnout. In fact, from the results we can estimate an attendance just above 3,000 people from *Generation Y* only from Marshall, let alone the other generations that may attend and citizens from the surrounding communities.

High School Survey

Yes	117
No	48

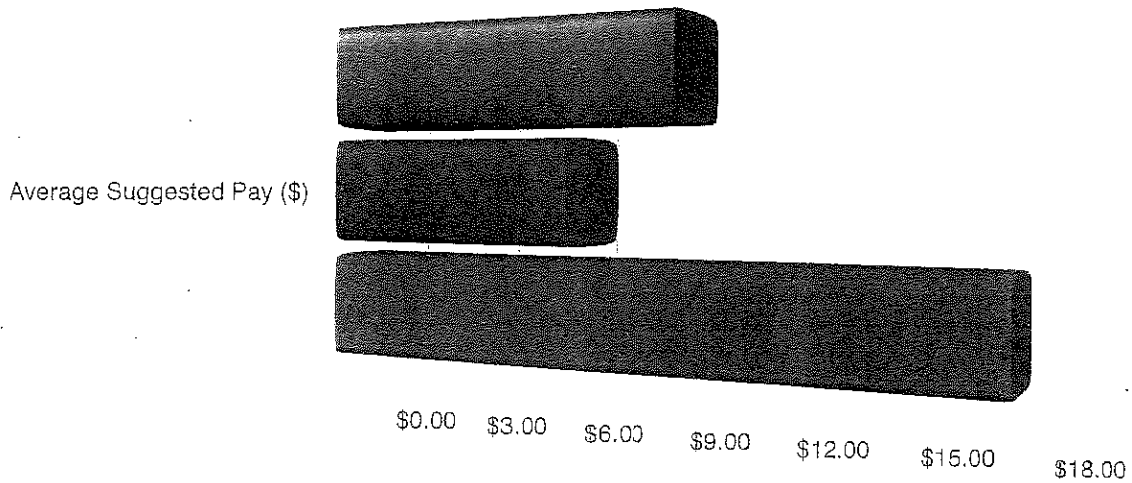


The final question in our survey asked our surveyors how much they would pay to attend our event. As you can see in the chart below, the results varied from grade to grade. The average cost from all the surveys combined came out to exactly \$11.00 per ticket.

Suggested Pay

	10th Grade (Sophomores)	11th Grade (Juniors)	12th Grade (Seniors)
Average Suggested Pay (\$)	\$9.45	\$6.71	\$16.88

- 10th Grade (Sophomores)
- 11th Grade (Juniors)
- 12th Grade (Seniors)



Focus Group-

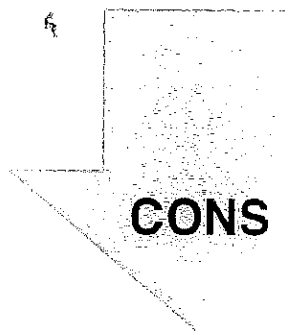
The focus group was extremely helpful in gathering feedback regarding the proposed idea of drag races at the airport. When we asked the students what they thought about the airport in a few words, we received the following answers:

- Run-down
- Small
- Mundane
- Not community oriented
- Mainly for farmers

When we mentioned the idea for our project, we asked for their thoughts on the pros and cons:



- Provide airport with additional revenue stream
- Bring in new target market of *Generation Y*
- Advertise for current businesses
- Support local businesses

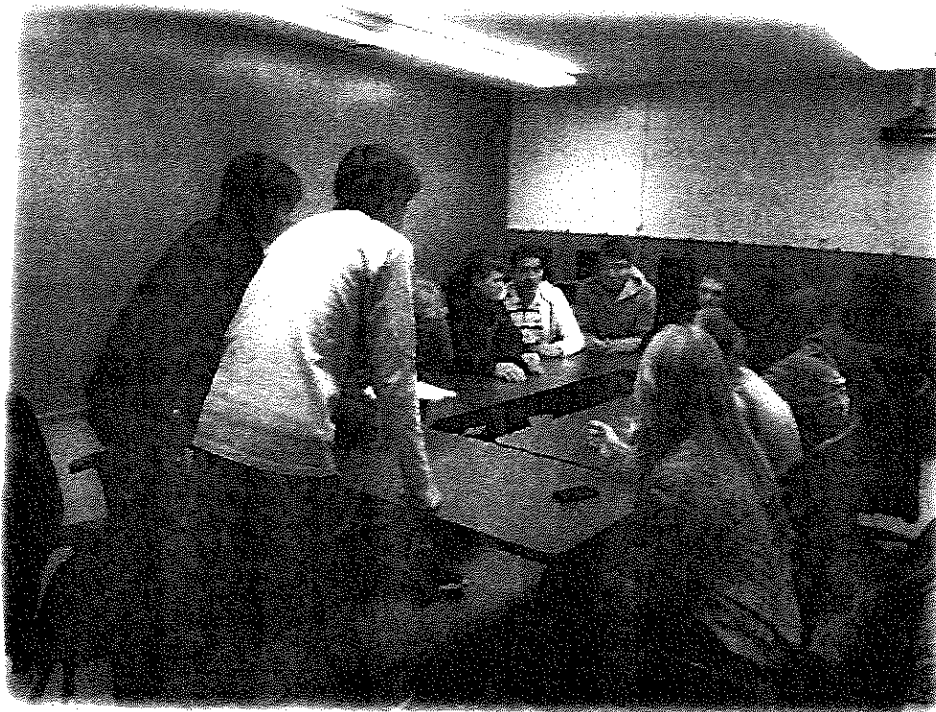


- Next to a neighborhood
- Safety concern
- Possible runway damage

When we asked about things that people in our generation currently do for entertainment, we received the following responses:

- Movies
- Driving around
- Loitering
- Hanging out at peoples houses

Then we asked if anyone in our focus group had previously been to the airport and not one student had been. Finally, we asked the focus group for an overall sentence saying what they thought about Marshall Drags and they said, "It is a good idea, although it will require a lot of work. It has a great chance to be successful, and this is the perfect community to do it."



Interviews-

Our first interview, with Bill Anderson, went as follows:

Question- How are you currently promoting the Marshall Airport?

Response- Brochures, Airport advertising, Online advertising, Circulars, and word of mouth by the pilots

-Who do you consider your target market?

-Pilots, Business and Pleasure air.

-How often is your facility used and whom by?

-Our facility is consistently used about 50% of the time for business, and 50% of the time for pleasure. A large majority of our business side is for commercial spraying of local crops.

-What do you consider to be the airport's main strengths and weaknesses?

-The new runway, taxi lanes, and improved fuel supplies are some great assets. The outdated terminal and services provided are some drawbacks. Plus there is no mechanic on site.

-Would you be interested in finding a different use for your facility?

-We are open to any ideas. The new community event center can always be rented out for various purposes.

In the interview with a member of the Jamestown Drag Racing Organization, several e-mails were used to converse. Through the e-mails, both an airport regulations statement and full budget statement were acquired. The budget was then molded to fit our standards. The airport regulations will be shown to the Marshall Airport to make sure that the airport is comfortable with our plan of action.

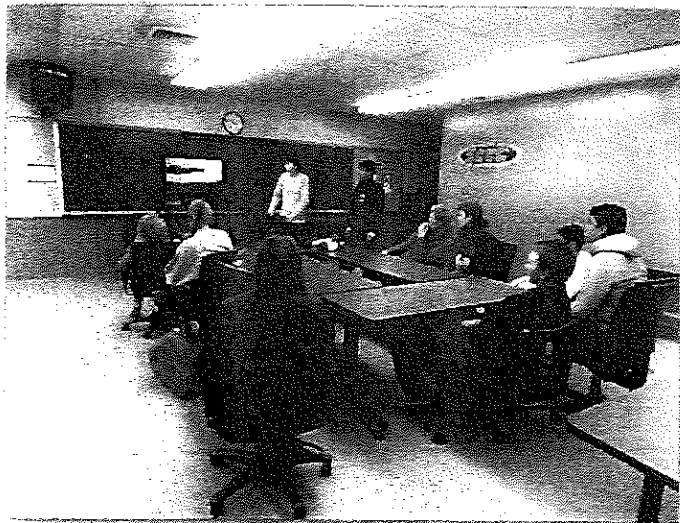
Websites-

The websites that we used, airnav.com and marshall-mo.com, provided us with information about the town of Marshall, such as demographics, economics, and socioeconomics. [Airnav.com](http://airnav.com) specifically helped with information and data on the airport and aerial percentages.

B. Conclusions Based on the Findings

Based on our extensive research, we were able to **conclude that the vast majority of Generation Y is interested in a drag racing event at the airport**. Every method of research proved to be greatly beneficial towards our overall outcome. The positive standpoint from this research tells us that if we actually put this proposed plan into action, not only would a great number of the Marshall population attend, but other surrounding communities as well. The flip side to this shows us that we need to do more research on how we can improve the event overall and how we can get the community involved with our project.

Overall, the research reached our desired generational groups, got *Generation Y's* feedback on our concept and the communities' quality, and proved that there is an enormous potential for our project.



V. PROPOSED STRATEGIC PLAN

A. Objectives and Rationale of the Proposed Plan

Our overall goal is to attract a new generational group, *Generation Y*, to the Marshall Airport. The Marshall Drags is an event that will take place on the airport's facility. The plan consists of two events; a drag racing event and a car show. This plan will not only create a better image for the airport, but it will create a better image for the community. The community involvement and advertising aspect of our plan will prove to be immensely beneficial. We have divided our proposed plan into **three main objectives** to fulfill our mission.

Objective- Organize a drag racing event at the Marshall Memorial Municipal Airport.

Rationale- Bringing a recreational event, such as drag racing, to the Marshall Airport will tremendously benefit the community and airport by attracting more clientele to utilize the facility while simultaneously increasing the airport's revenue.

Objective- To attract a new target market to use the airport, which includes the members of *Generation Y*.

Rationale- Based on the information acquired from Mr. Anderson, a small percentage of the airport's customers are from *Generation Y*. Based on our survey results, we have a solid foundation in which we believe a prodigious number of Marshall citizens, as well as numerous Missourians, will attend this event. Our proposed plan will give the local and surrounding members of *Generation Y* a recreational activity to partake in, which is our third and final objective.

Objective- Provide the people in *Generation Y* within the community and surrounding communities with a recreational activity.

Rationale- As our research shows, a shortage of activities and entertainment exists in the Marshall community. The members of our focus group even admitted to traveling to different towns in order to find entertainment. This void can be filled by our plan. We plan to provide the community as a whole with an entertaining function that contains both leisure and pleasure.

B. Proposed Activities and Timelines

The airports operational time period is at its busiest in the early spring and late summer. There is a "down" period for the airport, mainly the month of July. During the month of July, recreational enthusiasts take to the air for land photography, short distance transport, or just plain old fun. The airport's schedule is not nearly as busy as it is in the agricultural months, so there are some duration of time in which the airport is vacant. We have decided to use the facility during this time. The usual warm weather and clear skies provide an ideal time to host the Marshall Drags. Only a one-day time period to use the facility will be needed for the event. Sponsorships, regulations, preparation, and promotion are all categories being organized in the event's timeline.

Drag Race Event-

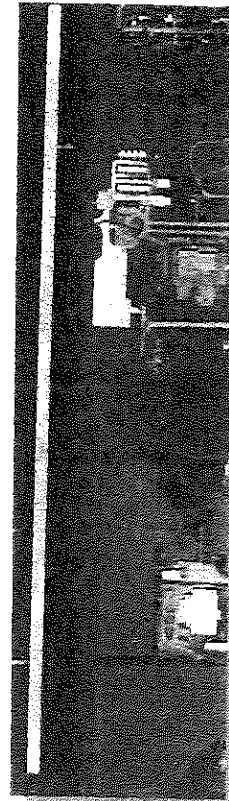
The drag event will take place on the main runway on the east side of the airport. Anyone will be able to enter the race with any type of vehicle; of course a valid drivers license and proof of insurance will be needed to participate. The entrees will be hand-divided into groups for fairness. The groups are as follows:

- “ ” - The vehicle must be manufactured before 1985. This group will be separated into two different categories: *Modified* and *Stock*.
- “ ” - Bone-stock. No modifications, usually just everyday drivers.
- “ ” - Any age, any make, 2x4 or 4x4. High performance trucks may have a separate group to be equal.
- “ ” - This group inquires any car that has been modified to enhance performance. Any make of a vehicle 30 years old or newer.
- “ ” - This class is for vehicles of extreme performance capabilities. (Ex. Porsche)

Rules and regulations will be set in place to help keep the racers, spectators, and the facility itself safe. Forms will be required to fill out to participate in the drag racing event to help acquire information about each racer and to make sure each racer meets the specific goals to participate. The safety factor is paramount in our event, so emergency units will be attending as well to help ensure overall well-being. The airstrip will be equipped with timing equipment, traffic barriers, markers, and various safety enhancements. At the end of the event, awards will be given to the top three finishers in each group. Both a cash prize and trophy will be awarded to those qualifiers.

Car Show-

The car show will take place all day during all the events. There is a big concrete lot that is normally used for holding planes (as seen to the right). During this day it would be the location for the car show. To get the cars for the car show we would post flyers at all the local automotive places and other places in local communities. Also contacting the local dealerships to get connections to car owners that would enter their cars. Nobody would be allowed to make physical contact with the cars in order to prevent damage. All the pedestrians that come through the car show will be able to vote for the best looking car and the winner of the car show will win \$500, second place winning \$250, and third place winning \$100. The cash prizes will be provided by the earnings from the event, as well as from the sponsors' contributions.



Timeline-

	DEC 2014	JAN 2015	APRIL 2015	MAY 2015	JUNE 2015	JULY 2015
Research						
Event Design						
Acquire Sponsors						
Promotion						
Event						

Research-

Surveys: (Completed)

We distributed our surveys throughout the Marshall High School on December 8th and collected them on December 12th.

Focus Group: (Completed)

We organized and held a focus group in the Saline County Career Center's meeting room on December 10th. The meeting was held from 11:45 to 12:10.

Interviews: (Completed)

We conducted our first interview with Bill Anderson on December 9th at the Marshall Municipal Utilities office at noon. We also conversed with Tami Berg of the *Jamestown Regional Airport* in Jamestown, North Dakota. We got in contact via email on January 5th through January 12th.

Event Design-

Logo / Plan Event: (In Progress)

The final logo and name for the event was established in early January. Planning the event schedule and coordination with all corresponding attributes of the event started in early January and is projected to end in near April.

Budget: (Completed)

The event's budget was modeled after a budget plan from the drag racing organization in Jamestown, North Dakota. The budget was given to us on January 9th by Mrs Berg.

Acquire Sponsors-

(To be accomplished)

Sponsors will be acquired by contacting each business individually or going to the place of work. Sponsors may reach outside the township of Marshall, such as Columbia, Missouri. The process will start in the month of April and should conclude near the end of May.

Promotion-

(To be accomplished)

Signs will be placed at numerous points around Marshall. Radio ads will be broadcasted on the local radio station *KMMO*, and possibly the much larger radio station of Columbia, MO, *Q106.1*, which has a wider reach. T-shirts for staff will be made and ordered in mid May. These shirts will also be available for purchase at the event. All of these promotional efforts should be completed by the beginning of June.

Event-

(To be accomplished)

The main event will occur in the month of July. We will have to get in touch with Bill Anderson to finalize the date of the event with the airport. The vendors will arrive the morning of the event to set up all of the equipment such as the stands, traffic barriers, and timing equipment. The event shall start in the early afternoon with the car show and shortly be preceded by the drag event. Both aspects of the event will be happening simultaneously to keep all the participants involved and occupied. The event should conclude around 8 pm. after the drag race has finished, the awards will be given immediately afterwards. The entire event should end around 9 pm. Clean up will need to be finished that night so the regular airport actions will continue the following day.

C. Proposed Metrics or Key Performance Indicators to Measure Plan

Effectiveness

Our proposed plan's effectiveness will be calculated by the following measurement tools.

Surveys- The surveys that were used in the research stage of our plan, showed that an overwhelming amount of *Generation Y* would participate in our event. By using a follow-up survey at our event, we will then determine our event's success. A brief survey consisting of three "yes or no" questions will be distributed at the event to exiting participants.

Revenue- Our in-depth budget has given us a solid idea of how much profit will be earned by the event. The "Expenses" totaled up to \$17,814.27, while the revenue was \$43,815.00. The entire event is projected to yield a net profit of \$26,000.00.

Attendance- We will record the attendance of the event both numerically and by each generational group. We will do so through the use of our follow-up surveys. The event attendance will then be compared to the annual clientele rate of the airport and we will determine whether the event's plan of attracting a new target market was highly effective.

VI. PROPOSED BUDGET

Costs Associated with Proposed Strategies

The Jamestown Drag Racing Association from North Dakota has provided us with a full, in-depth budget for their annually hosted event. The event that they put on is almost identical to our proposed idea, so we made some minor alterations to modify the budget to our event. Our budget for the event is as follows:

Income		Expenses	
Grant from M.S.E.D.	\$ 5,000.00	<u>Advertising</u>	
Food Vendors	\$ 550.00	Banners & Signs	\$ 207.34
Gate Fees (Spectators)	\$ 8,607.00	Posters	\$ 705.91
Racers	\$ 11,345.00	Radio Ads	\$ 1,750.00
T-Shirt Vendor	\$ 200.00	Staff T-shirts	\$ 204.74
Miscellaneous Income	\$ 25,702.00	Advertising Expense	\$ 2,867.99
<u>Sponsorships/ Ads</u>		<u>Miscellaneous</u>	
Business Cards	\$ 1,875.00	Ambulance Service	\$ 1,368.75
Trophies	\$ 488.00	Announcer	\$ 350.00
Lane Sponser	\$ 3,000.00	Equipment Purchase	\$ 18.18
Auto Zone	\$ 3,000.00	Equipment Rental	\$ 1,491.00
O'Reilly's	\$ 1,500.00	Insurance	\$ 2,237.63
Thomas Oil	\$ 1,500.00	Airport Repairs	\$ 2,000.00
Exchange Bank	\$ 1,000.00	Trophies	\$ 800.00
Wood & Huston Bank	\$ 1,500.00	Timing Equipment	\$ 1,351.44
Community Bank	\$ 1,000.00	Utilities	\$ 229.03
Elmer Hare Ford	\$ 750.00	Miscellaneous Expense	\$ 9,846.28
John Rector Motors	\$ 750.00	<u>Payouts</u>	
Marshall Dodge	\$ 750.00	"Classics" Class	\$ 850.00
MACO	\$ 500.00	"Grocery Getters" Class	\$ 850.00
Ted's Auto	\$ 500.00	"Trucks" Class	\$ 850.00
Sponsorship Income	\$ 18,113.00	"Tuned" Class	\$ 850.00
		"Exotics" Class	\$ 850.00
		Car Show	\$ 850.00
		Payout Expenses	\$ 5,100.00
Total Income	\$ 43,815.00	Total Expenses	\$ 17,814.27
TOTAL PROFIT \$26,000.73			

Income-

Grant from Marshall Saline Economic Development Corporation:

The Marshall Saline Economic Development Corporation is a city organization that grants money to upcoming or incoming businesses to help aid them in the start-up process of their business's life. We were able to reach this organization and receive an estimate on the amount we could expect. This estimate that we received was \$5,000.00.

Vendors:

Since our event is to start right after noon and continue through the night, nearly 10 hours, we believe food vendors are a necessity and another opportunity for revenue. An apparel vendor will also be part of the event, to further sponsor the event. The vendors will give the event 15% of their earnings.

Gate / Racer Fees:

The entry fees from both the spectators and racers are a prodigious portion of the earnings for the event. Our surveys gave us an insight on how much these participants would be willing to pay in the generation we are trying to reach, *Generation Y.*

Sponsorships:

We are allowing several opportunities in our event for local and surrounding businesses to promote their business. The first sponsorship opportunity that we are offering are business cards. These business cards will be distributed all throughout Saline County and Missouri itself. On the back of the business cards will be slots for sponsors to advertise their logo and name. Another sponsorship opportunity are the trophies that will be awarded to the top three finishers in each category. Only one to two sponsors will be able to put their name on these trophies due to limited space. A small plaque will be placed on the side of each trophy with the sponsor's logo or name on it. The lane sponsor will be a big opportunity for sponsorship because the lane will be referred as the sponsor's name throughout the entire event.

The local owner of the *AutoZone* store in Marshall is a big drag racing enthusiast himself, so we expect a large sponsorship from him. *Thomas Oil*, being influenced by the racing culture, and *O'Reilly's*, another local automotive supply store, are both very promising sponsors that are in our local community. In Marshall, there are three main banks that compete over the opportunity to sponsor local events. *Wood & Huston* is undoubtedly the most extensive bank in the community, but we can expect large sponsorships from all of these banks. We expect the local automotive dealerships will also be very generous in their sponsorships towards the event.

Expenses-

Advertising:

Banners, signs, posters, radio ads, and staff t-shirts will be some of our methods of advertising. The expense price for all of these methods are all based on the local businesses that gave us an idea on the cost.

Ambulance/ Emergency Services

To take precaution, we have made it a must to have emergency services at the event. EMT's, the Marshall Fire Department, and the Marshall Police Department will all be attending the event to ensure the safety of all partaking in the event.

Announcer:

An announcer will be beneficial to keep the spectators up to date and the entire event organized. Announcing necessary event information and the winners will be the task of the hired announcer.

Equipment Rental:

Generators for lighting, concrete traffic barriers, and stands for the spectators, are all necessary equipment for the event to operate, and that will need to be rented for the event.

Insurance:

Insurance will be needed to help protect the airport's facility and participants of the event, although a waiver will need to be signed by the racers that will state neither the airport, event, or other racers will be liable for accidents that particular participant is involved in. He/she alone is liable for themselves.

Airport Repairs:

The drag racing organization in Jamestown, ND gave us an overview on how they handled the damages to the runway. A before and after picture was taken of the runway in order to comply with the set regulations of the *Jamestown Airport*. The repavement of the starting line of the drag race was the only damage to the runway.

Timing Equipment:

Timing equipment will be utilized for the sole purpose of timing the runs. This equipment will also make the decision on which racer won their race and will be more reliable and accurate.

Utilities:

These include electricity and water usage, but will be, more than likely, not used.

Payouts / Trophies:

\$ 500.00 - First place

\$ 250.00 - Second place

\$ 100.00 - Third place

These amounts are identical for all categories of the drag race event and the car show. The trophies were appraised by the local trophy supplier, *Vikings Athletics*, which allows us to have an accurate cost for this particular expense.

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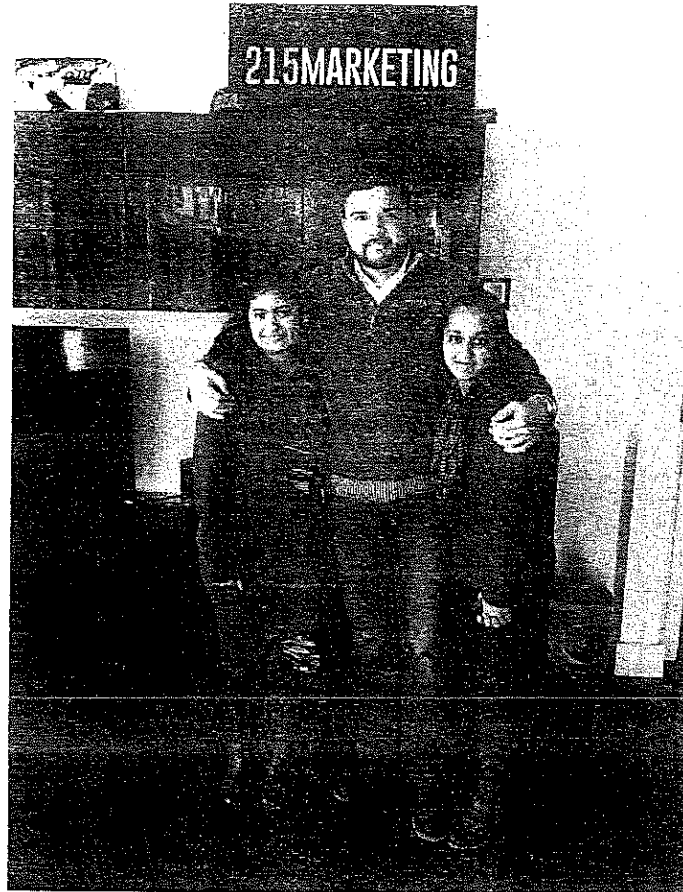
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215 Marketing

Brand Builders. Digital Dreamers. Marketing Mavericks.



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I. EXECUTIVE SUMMARY

One- to three-page description of the project

This market research study will focus on the development of a long-term employee engagement strategy at *215 Marketing*, a full-service marketing agency based in Philadelphia, PA. Gallup, a leader in market research, defines engaged employees as those who are "involved in, enthusiastic about, and committed to their work." Building a team of engaged employees will allow any business, and specifically 215 Marketing, to succeed as a service business in a highly competitive industry. Although 215 Marketing possesses a team of driven employees, it does not have a scalable and measurable engagement strategy. Since 215 Marketing is a young startup, its engagement strategy must be fluid enough that it can sustain rapid growth and introduction of many more employees. Employees are currently engaged through a combination of benefits and company culture, without there being any method of gaining feedback from the employees themselves. Our plan will create an employee engagement strategy for 215 Marketing that will focus on the key issues that are a hindrance to engagement today, but will be a scalable strategy at the same time.

Research Methods Used in Study

Our research study consisted of secondary and primary research. We first developed a clear understanding of employee engagement by reading Gallup's 2013 report on the status of engagement in the U.S. After gaining background knowledge, we learned about the services 215 Marketing has to offer by visiting the company website, blog, and social media. Through this online research, we learned that 215 Marketing has a tight-knit and driven team. Afterwards, we conducted primary research to gain insight into the engagement strategies developed by the managers and current levels of engagement at the startup. Our primary research consisted of employee surveys and interviews, as well as detailed interviews with the managers. In addition, we conducted phone interviews with several of 215's competitors, in order to learn about engagement strategies they are utilizing. We also visited their websites and blogs. Upon the conclusion of our primary research, we once again conducted secondary research in order to develop specific solutions to the engagement issues we found during our primary research.

Findings and Conclusions of Study

Upon completing our research study, we organized our data into a SWOT analysis. Our results are as follows:

- Strengths - the managers and employees are close friends, employees believe their job furthers the company's mission, fun culture balanced by hard work, free coffee, free healthcare, and free *Beats* headphones
- Weaknesses - lack of transparency between management and employees, lack of a long-term strategy, lack of a professional relationship due to the friendships they have, high levels of stress, employees don't get to focus on individual strengths, the office space is inadequately painted and furnished
- Opportunities - better horizontal and vertical communication, development of a long term strategy exceeding that of its competitors, increase success of the company through more engaged employees
- Threats - competitors such as Push 10 and Nimblelight develop stronger employee engagement strategies, thus bettering their bottom line

Proposed Strategic Plan

To address the engagement issues discovered during the research study, we propose a strategic plan that encompasses 6 major goals; these 6 goals entail a well-rounded approach for long-term engagement. For our first goal to improve wellbeing and reduce stress, we propose a mindfulness program, a gym and health food store campaign, daily morning walks with *FitBit*, and tri-yearly company retreats. To increase staff communication, our second goal, we propose monthly all staff meetings, monthly manager meetings, monthly employee engagement surveys, and lunch and learn. The third goal is to increase acknowledgement of employee accomplishments, and to accomplish this, the company will use the *iDoneThis* computer program. To give employees opportunities to focus on individual strengths, the fourth goal, they will go to industry conferences, blog, learn through online courses, and practice 10% time. To establish clear expectations and boundaries for the employees, the fifth goal, they will develop core values and have a sit down discussion about each employee's role within the company. Finally, goal 6 renovates the office space, and to carry this out, 215 will paint one wall teal, hang motivational posters, convert a small room into a "Mindfulness Room," and replace their normal desks with height adjustable desks.

II. INTRODUCTION

A. Description of the business or organization

215 Marketing is a full service marketing agency based in Philadelphia, Pennsylvania. "Young, agile, and high energy," they specialize in website development, integrated marketing strategy, B2B internal and external support, content marketing, and search engine optimization. 215 Marketing prides itself on its mission to deliver consistent and measurable results for the clients that seek out its services, as well as its ability to "take their online presence to the next level." By taking a comprehensive and client-centric approach to developing marketing strategies, this agency is able to successfully brand itself as "Brand Builders. Digital Dreamers. Marketing Mavericks."



215 Marketing was founded by Jon J. Vogel, Garrett Gillin, and Edward Reybitz in 2013 in a startup incubation program at the Baiada Institute of Entrepreneurship at Drexel University. Vogel and Gillin currently run the company with the goal of taking digital marketing to new heights.

215 Marketing provides a variety of services, primarily in digital marketing, that allow their clients to find great success in a technology-driven era of advertising. Digital marketing is the promotion of products through electronic mediums, such as the Internet and social media. This form of marketing results in increased communication with customers and generally has a smaller budget than traditional advertising, making it a great option for businesses of all sizes. Upon developing a website for a client, 215 Marketing works on the company's brand elements and materials, on-site blog, social media, channel reputation, community outreach, and other methods of outbound marketing. Of course, since 215 Marketing's main focus is digital marketing, they excel in web design, mobile app and software development, landing pages, and ecommerce. They offer general marketing strategies to their clientele as well, which include logo enhancement, print advertising, and general consulting. As



an official Google Partner, 215 Marketing is recognized as an online advertising professional with expertise in Google Adwords. 215 Marketing's employees refer to their company simply as 215; henceforth, we will do the same in our report for ease of reading.

Although 215 is still a startup, an entrepreneurial venture in the first stage of its operations, it works with companies of all sizes across many different industries and is rapidly expanding the scope of its business.

B. Description of the community (economic, geographic, demographic and socioeconomic factors)

The current population of the United States is around 318.9 million, making it the third most populous country in the world. It has established itself as the world's largest economy with a GDP of 16.8 trillion USD. With the rise of digital marketing, firms like 215 will be in high demand. According to a study conducted by market research firm Mundo, 80% of companies plan on increasing their digital marketing budgets over the next 12-18 months. In fact, U.S. spending on digital ads reached an astounding \$60 billion in 2015, and this number will only continue to rise. It is evident that in the U.S, and the world at large, digital marketing is on the rise. A need for innovative digital marketers has allowed 215 to thrive, as they serve clients in PA, NJ, and around country. Small businesses started by entrepreneurs are the backbone of the US economy, and these entrepreneurs require marketing strategies to position them for success in an increasingly competitive environment. 215's unique skillset positions its clients for success, as well as the agency itself.

Specifically, 215 is based in Philadelphia, Pennsylvania. This city is the largest in Pennsylvania, with a population of around 1.5 million people; it is easily considered the economic and cultural hub of the Delaware Valley region. Starting a business in Philadelphia in the manner Vogel, Gillin, and Reybitz have done certainly has its advantages. Philadelphia is an hour away from New York City, the cost of living is affordable, and it is extremely nearby to business schools that produce some of the best entrepreneurs (including Drexel University, the school the co-founders of 215 attended). In fact, some of 215's employees were hired straight out of local schools. Philadelphia is compact and intimate enough that a lot of entrepreneurs and companies tend to know each other, making it easier to network and build relationships as opposed to a large city like New York. Philadelphia is also considered the perfect startup ecosystem, consisting of "incubators, accelerators, and access to funding and other support from universities and nonprofits [...] these things work in concert to help people turn innovative ideas into businesses" (Popular Mechanics magazine).

C. Overview of the business or organization's current culture and employee engagement strategies

215's culture is one of a typical startup; this in turn heavily influences their employee engagement strategies. The overall culture, as espoused by Mr. Vogel, is "work hard, play hard." All the employees lead highly productive days while in the office (sustained by several cups of coffee), and if need be, will work over the weekend. The managers' guiding philosophy, which outlines the environment and culture at the office, is "the dream is free, but the hustle is sold separately." As such, 215 only hires analytical and critical thinkers who have incessant drive, and when such individuals come together, a high-energy, creative, and collaborative atmosphere is created. 215 consists of a very small team, as there are only three employees and two cofounders (who are also the managers). Because of this, there is camaraderie and friendship between all members of the 215 team, and they often meet outside of work in social settings. In addition, employees are allowed to come into the office late, get two weeks paid vacation, and don't have to give an advance notice to the managers for vacation. However, this intense level of comfort can also prove disadvantageous, as we elaborate later on. Furthermore, Vogel and Gillin have worked to create a flat organizational structure instead of rigid hierarchy. As such, the employees are mostly autonomous and don't receive constant direction and supervision from a manager. Despite these benefits, there is a lack of a long-term employee engagement strategy at 215. Because this is a startup, the managers have been focused on other aspects of their business, such as building a clientele and cementing their business model. The current engagement strategy is incomplete and is one based off of a unique culture and perks; these benefits includes Beats headphones, coffee, health insurance, and 401(k)s. While such factors are the beginnings of a successful employee engagement strategy, no long-term strategy has been developed to sustain the company as it scales. In other words, 215 does not have an engagement strategy in which engagement is measured, managers are held accountable, and concerns of the employees are being taken into account on a continual basis.

III. RESEARCH METHODS USED IN THE STUDY

A. Description and rationale of research methodologies selected to conduct the research study

Our employee engagement research study consisted of primary and secondary research and employed several different methods of gathering data. The objectives of our preliminary secondary research were to obtain an overview of employee engagement, gain knowledge about 215 in general, and learn about how the company's employees interacted with their clients. Afterwards, we conducted primary research to obtain specific data regarding the level of engagement

and the current engagement strategies at 215. We also conducted phone interviews with some of 215's competitors to learn about engagement tactics they utilize. Upon the conclusion of our primary research, we once again conducted secondary research to learn about engagement tactics used by companies in order to develop a long-term engagement strategy for this company. Our study was split into three parts, consisting of **Phase 1 - Preliminary Background Information** (secondary research); **Phase 2 - Engagement Study at 215 and Competition** (primary research); **Phase 3 - Engagement Tactics Internet Search** (secondary research). Each part of the research study will be named after the phase and order in which it was conducted. Research Method 1.1, for example, would be the first task conducted in Phase 1.

1.1 Gallup's Report: State of the American Workplace (Secondary): Gallup, the industry leader in market research, released a 60-page report in 2013 on the status of employee engagement in the U.S. This report provided us with an overview of engagement, its importance and benefits, and the overarching strategies for improving it. Specifically, it highlighted the fact that engagement begins with the managers. In addition, the report discussed Gallup's Q12, a thoroughly researched employee engagement survey. Gallup also stressed the importance of measuring engagement and has designed several tools for doing so.

- **Rationale:** As the inspiration for this year's DECA Operations Research topic, we knew that this report would provide us with the information necessary to understand the complexity of employee engagement and start our research study with a firm grasp of the topic. The organized and concise structure of the report only served to enhance our understanding of engagement. Furthermore, the Gallup Q12 gave us insight as to what direction our primary research should take in terms of the questions asked and benchmarks measured.

1.2 Website, social media, and blog (Secondary): In order to gain background information on 215 and its services, we thoroughly navigated the company website, blog, and various forms of social media. 215's website describes the types of services they offer, lists the clients they've worked with, and highlights their "client-centric" mindset. We also noticed that the company blog had been inactive for a full year.

- **Rationale:** Through online research, we aimed to gain an understanding of 215's culture and attitudes, as well as learn about its services. From their social media, we gauged that the company has a close-knit team and unique culture, while from their site we learned that their team is driven and hardworking. By studying their online presence, we were able to understand the brand image 215 intends to project, which is one where the employees are highly committed to the startup experience.

1.3 Google Reviews: Employee - Customer Interaction (Secondary): To learn about the employee interactions with customers, we read Google Reviews that 215's clients have written. These online reviews made several positive qualities about the 215 team and discussed the overall experience of working with the team.

- **Rationale:** How clients felt about the team can offer some insight about employee performance levels, and to a certain extent, engagement. However, we were careful not to make the mistake several companies do, which is to mistake productivity for engagement. It is possible to be somewhat disengaged and still productive. Through this, however, we aimed to determine whether employees were productive. Further research gave us insight about whether employees were productive and engaged, or productive and disengaged.

2.1 Employee Surveys (Primary): We created an online Google survey for the employees at 215 to take. Some of the questions were inspired by the Gallup Q12, a survey that has been tested thousands of times, while others were open-ended that required employees to describe what they liked and disliked about working at 215. We also asked employees about the length of time they have been working at the company, the number of hours they work per week, and the level of stress they experience due to work. Most of the questions were asked on a scale of 1-10, with only a few requiring the employee to type a sentence or two.

- **Rationale:** In a survey most people are not interested in writing out sentences, but would rather fill in a bubble or check in a box. As such we designed a survey in which a vast majority of the questions involved selecting a number on a scale from 1-10, while 2 questions required a sentence-long explanation. As the first research method employed in primary research, our goal was to gauge the level of employee engagement. Furthermore, we asked quick and simple questions so that employees would feel comfortable in giving honest answers. We understood that the quantitative data from the surveys would be instrumental in formulating interview questions.

2.2 Employee Interviews (Primary): 10 minute interviews were conducted with each of the three employees in which we asked them to elaborate on their opinions about working at 215, discuss the current methods Vogel and Gillin utilize to engage them, what they dislike about working at an early-stage venture (as opposed to a large corporation), and what they would like management to do in order to improve their engagement.

- **Rationale:** The employee interviews allowed us to gain deeper, qualitative insight into the employees' opinions about their work life and how management could increase their engagement. Interviews are the perfect medium to discuss any concerns the employees have, since they may have felt uncomfortable in doing so in the survey. Furthermore, any open-ended

questions we could not ask in the survey, we could ask in the interview setting. We also had the opportunity to ask follow-up questions and engage in a true conversation, thereby obtaining meaningful answers.

2.3 Manager Interviews (Primary): We conducted an hour-long interview with each of the managers, Jon Vogel and Garrett Gillin. In these interviews, we asked about current employee engagement strategies, how 215 differs from its competitors (in terms of culture and team), who inspires their current engagement strategy, and what they'd like to improve on for engagement. We also inquired about the benefits employees receive and what the hiring process looks like. In other words, from the moment a candidate is being selected for a job at 215, we wanted to understand the managers' thought process and approach towards employees.

- **Rationale:** In order to understand the thought process and thinking that goes into creating the unique culture at 215, we knew interviews with the managers were essential. By interviewing the managers and employees separately, we were able to pinpoint places where a lack of communication was occurring. Furthermore, we knew how engaged the employees were, but we wanted to see if the managers were aware of the concerns the employees had raised with us. Overall, we wanted a closer look at the reasons the engagement strategy is what it is, and input from the managers on how it could be improved.

2.4 Personal Observations (Primary): While visiting 215 office to conduct the interviews, we observed the physical layout in order to assess how comfortable of a setting the employees had to work in.

- **Rationale:** The environment one works in can substantially affect mood, productivity, and engagement. As such, we needed to observe the office to determine if a lack of paint and furnishings were negatively impacting employee engagement. Because they are a startup, it is likely they simply never had time to focus on their physical office space.

2.5 Competitor Phone Interviews and Website Research (Primary): For a service business, an engaged team can be a valuable core competency. In order to determine the kinds of company culture and engagement strategies employed by this company's competitors, we conducted phone interviews with eight competitors and researched the websites of these companies. In addition, we investigated their company blogs to learn about their culture.

- **Rationale:** By researching the company culture and learning about the engagement practices used at several competitors, we could determine whether or not 215's unique culture was really unique after all. Because 215 currently depends on its culture as a primary engagement tactic, we needed to investigate strategies utilized by competitors, who benefit from engaged employees, and gauge where 215 stands.

3.1 Internet Research - Engagement Tactics (Secondary): After completing primary research, we looked online for

different methods of improving engagement. This research was specifically based off the results we had obtained during the primary and secondary research from before, so that we could tailor solutions directly to 215's needs. Through this process, we were able to develop a plan to improve employee engagement.

- **Rationale:** The purpose of the research study, from the very beginning, was to pinpoint areas for improvement and develop a plan. Upon gathering data from 215 and its competitors, we were ready to develop a long-term strategy that was highly targeted and specific to issues found in this company earlier.

B. Process used to conduct the selected research methods

Our research study consisted of secondary and primary research, both of which were separated into specific phases. In order to maximize the quantity and quality of the data we gathered, we utilized several research methods, including surveys, interviews, and personal observations. **Phase 1** of our research was our background secondary research. Within Phase 1, we had three different sections. **Phase 1.1** consisted of a thorough reading and analysis of the Gallup Report 2013 on employee engagement. After understanding what employee engagement was, we conducted **Phase 1.2**, in which we researched 215 itself through its website, blog and social media. Our purpose was to gain a sense of what 215 did and of its general culture. Upon learning about the company, we conducted **Phase 1.3**, where we consulted online Google Reviews to get a sense of how 215's clients felt about the company and employees, so that we could determine if the employees were engaging well with their clients. We knew, however, that further primary research was necessary in order to determine if the positive customer service reviews were an indication of engagement or simply productivity. Each of these methods were conducted at home or online in the order presented above. The second part of our research study, **Phase 2**, was the primary research conducted primarily at 215's office. Before visiting the office, the employees all took an online survey we created, so that when we visited, we could discuss their survey answers. In preparation for our primary research at the 215 office, we also developed interview questions for the manager and employees based off of our secondary research and survey results. While at the office, we made sure to take note of our surroundings and assess the physical environment. Afterwards, we called several competitors to learn about their strategies. After finishing our primary research, we conducted the final stage, **Phase 3**. At this point, we had uncovered engagement issues at 215 and needed to develop solutions, so we researched solutions online and combined them with our own ideas. Any remaining questions we had for the manager were discussed via email.

IV. FINDINGS AND CONCLUSIONS OF THE STUDY

A. Findings of the research study

1.1 - Gallup's Report: State of the American Workplace: As part of our secondary research, it was imperative that we read Gallup's report, as it gave us a sense of what employee engagement is comprised of and how it could be measured and made better. Our take away findings from this report would later support the rationale for portions of our plan. We found that employers need to focus on employee strengths to make them feel valued and find ways to incorporate wellness programs to improve overall wellbeing. Furthermore, we were introduced to the concept of a "honeymoon period." Essentially, an employee in the honeymoon period has recently been hired and is thus engaged and enthusiastic on the job. However, this is not necessarily indicative of successful company engagement strategies and as a result, many companies often mistake the honeymoon periods for true engagement in their employees.

1.2 - Company Website, Social Media, Blog: We also found it necessary to conduct secondary research on the company itself. However, because 215 is a young company, its online presence is not at a point where extensive research could be done online. However, their website was informative and became the main source for gathering important background information about the company. One of the key ideas we gathered from their website was that their culture was unique and reflective of the startup model. They described themselves as "young, agile, and high energy," as "having a work schedule they know absolutely nothing about," and having consumed "23,328 cups of coffee." While many of these comments are conveyed in jest, they do serve to show that their passionate and tight knit culture is definitely a strength worth preserving as we come up with our plan to improve the engagement.

1.3 - Google Reviews: Several of this company's clients have written online Google Reviews, and we found that they were all positive. Clients found the team to be very personable yet professional, as well as honest and reliable. Through this, we learned that 215's employees are productive when dealing with customers, but not necessarily engaged. To truly determine if the employees were simply productive at work and still slightly disengaged, we needed to conduct primary research with the team.

2.1 - Employee Surveys: The employee surveys were the first part of our primary research stage. To conduct these, we created an online survey via Google Forms for the employees to take prior to our arrival at their physical office. Before presenting this data, it is important to note that each employee has a different profile and different role in the company

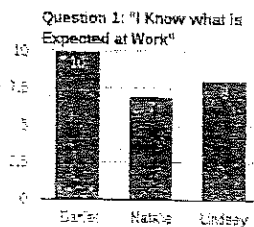
that impacts their results. However, we also wish to keep names private. Therefore, to account for difference in roles and to maintain anonymity, we have designated each employee a changed name: Daniel, Natalie, and Lindsey.

These titles will be utilized throughout the rest of report, with a description of each as follows:

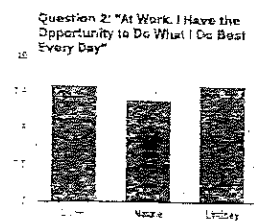
1. **Daniel** - a pay per click analytics associate who has been working at the company for 1 week
2. **Natalie** - an account manager who has been working at the company for about 8 months.
3. **Lindsey** - a graphic designer who has been working at the company for about 1.5 years.

For our survey, we included 11 statements and asked each of the employees to rank the truthfulness of each statement on a scale of 1-10, 1 being not applicable at all and 10 being completely true. Then, we asked them two open ended questions where they could formulate their own responses about what they liked/disliked about working at their company. Afterwords, there was one question about their stress level on a scale of 1-10. Each of the 15 questions - along with employee responses and a little information/explanation about them- is as follows:

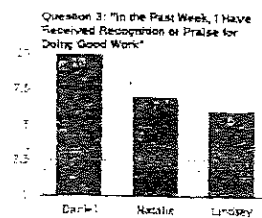
Question 1: I know what is expected of me at work. As evident from the graph to the right, some employees, with the exception of newly hired Daniel, aren't 100% sure what to do all the time since the company is a startup and everyone is fulfilling several roles.



Question 2: At work, I have the opportunity to do what I do best every day: Because the employees are taking on several roles, their ability to focus on their strengths and primary job is diminished, and this is something even Daniel experiences only 6 days in.

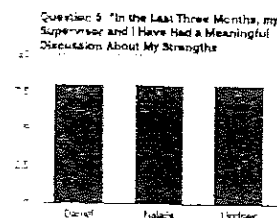


Question 3: In the past week, I have received recognition or praise: As the graph indicates, employees do not receive much praise for their employers, creating a situation in which a lack of motivation can arise. However, Dan gave this a 10 because he is new.



Question 4: My supervisor cares about me as a person. Management has done an excellent of making employees feel welcome and important, as all employees gave this question a 10.

Question 5: In the last three months, my supervisor and I have had a meaningful discussion about my strengths. These numbers are high (graph to the right), but not high



enough if the managers and employees have truly had a meaningful discussion. These numbers indicate that a discussion had taken place, but it has not been satisfactory.

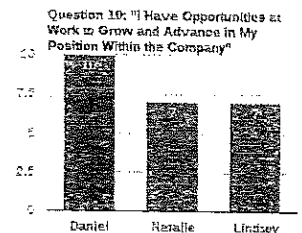
Question 6: At work, my opinions seem to count. Because 215 is a startup with a few employees, each person's voice is heard, giving everyone a sense of accomplishment and importance, and this is crucial for employee engagement. As such, each employee gave this category a 10. In this case, the startup experience aids engagement.

Question 7: I know this company's mission, and how my job fulfills that purpose. Vogel and Gillin have been successful in communicating the company's overall mission to the employees, who in turn feel like they are continually working towards accomplishing that mission. All employees gave 10s.

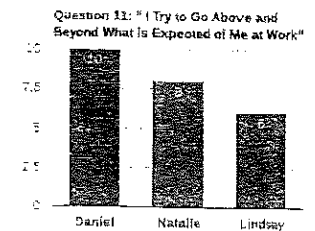
Question 8: I feel as though I am part of a community. The tight-knit culture of 215 is definitely an asset, as all the employees and managers are friends and feel comfortable at work. As a result, employees do not feel apprehensive while sharing their ideas and opinions. All employees gave 10s.

Question 9: I have opportunities at work to enjoy and have fun. The 215 culture is "work hard, play hard" and the employees, as evident from their responses, thrive in this environment. All employees gave 10s. Despite the fun they have at work, their jobs still cause high levels of stress, which currently goes unaddressed.

Question 10: I have opportunities to grow and advance in my position. In a startup, although the employees can not move up in position technically, they are still learning a lot and have the opportunity to take on more responsibility as they gain experience.



Question 11: I try to go above and beyond what is expected. Generally, the employees put in as much effort as possible. Notably, Lindsey, the longest employee, chose a score of 6, lower than the others. Thus, it can be inferred that as an employee stays at the company longer, the less motivated they feel because no concrete engagement strategies exist.



Question 12: "How many hours a week do you spend working at 215?"

Daniel: 40-50 hours

Natalie: 45 hours

Lindsey: 45 hours

Question 13: "What is the BEST part about the work culture of 215? Tell us in a sentence or two."

Daniel: "I like that the partners are very passionate about what they do, they truly believe in their company and it shows through

both their work and the appreciation of their clients. I also like that they are eager to help me learn the tools that I need to progress in my position."

Natalie: *"We're a young group, and because of that there is a never a dull moment working at 215. Our work environment is very dynamic, very fluid, and laid back yet hard working."*

Lindsey: *"The friendships that we have"*

Question 14: "The not-so-great part about the work culture of 215? Tell us in a sentence or two. "

Daniel: *"I've only been working here for a week and I haven't noticed anything that I would say I don't like."*

Natalie: *"What can also be considered a bonus to working for a young company can also be frustrating. There are a lot of unknowns and uncertainties."*

Lindsey: *"Very stressful all the time. Unorganized sometimes. No one to learn from sometimes."*

For each employee, all of their responses were averaged together (and the open ended responses were taken into account) to create a single number which, on a scale from 1-10, represents their current engagement level. Daniel has an average score of 9.6, Natalie has an average of 8.2, and Lindsey has an average of 7.6. These numbers will be used to measure employee engagement after the implementation of our plan, which will be explained later as part of the metrics.

2.2 - Employee Interviews: For the next stage of our primary research, we conducted interviews with the three employees at the actual office. The interviews with the employees were much less rigid in structure than the survey and allowed for more spontaneity in questioning and detail in responses. Here are the takeaway points from each individual employee:

Daniel: Daniel had nothing negative to say about the company or its engagement strategies. For him, the major highlights for working for 215 are that he has been taught so much by the management since he has arrived and that the relationships between everyone are great. He feels very connected to his job and to the greater mission of 215 as whole. It is important to note that Daniel has only been at the company for 6 days at time of interview, and as such, he believes management is 10/10 in transparency.

Natalie: Natalie was also generally pleased with the company. She has massive trust and faith in Mr. Vogel and Mr. Gillin. She feels that "everything she does contributes to this business." While she did not say that she is being explicitly taught what she should do anymore, she is still learning from her job, especially when she performs multiple

roles within the company. One of the things that concerns her is that the future of this company is uncertain, as it is a startup. Furthermore, she believes management is lacking in transparency, as we elaborate on later.

Lindsey: Lindsey, although content with the company in general, did have issues as she opened up to us in the interview. Out of all the employees, she seemed to have the most suggestions for improvement of employee engagement. She had major issues with the transparency of the management - that is, the ability of management to let the employees know the pertinent information about the company. This makes her, in turn, feel excluded and thus she gave management a 6 out of 10 in transparency, a glaring issue. She also commented about the lack of direction given by the managers and said she has no one to learn from. This is a striking disparity from what Daniel mentioned about "learning so much," and even from what Natalie felt as well - and she is the company's longest employee.

2.3 - Manager Interviews: During this stage of our primary research, it was extremely important that we conduct interviews with the management as well, to gain insight into how they felt about employee engagement strategies at their company, how they developed their current strategy, and what they looked to improve on.

Mr. Jon J. Vogel - Mr. Vogel, one of the managers and cofounders, was very open and honest about where his company stands in regards to employee engagement, and brought up a few key ideas. According to him, 215's engagement strategy is basically one that a) tries to give a good environment for productivity and b) tries to establish the importance of the employee's role to the company as a whole. In addition, he would describe his engagement strategies as "average," and his office as a "thankless place." In other words, 215 is a place where very little recognition is given for the work an employee does. He would describe the company and its work atmosphere as "confluent and process driven." Vogel also emphasized the point that all the employees and managers are friends and have very close relationships; however, that presents certain drawbacks that he does want to eliminate. Furthermore, he believes that engagement can not be solved with higher salaries. Overall, if Vogel had to change three things about the current engagement strategy, he would want to improve the management style, be able to set clear expectations for his employees, and establish a clear line of friendship and employer/employee relationship.

Mr. Garrett Gillin - Mr. Garrett Gillin, the other cofounder, had some different opinions about employee engagement at 215. According to him, the employee engagement strategies at 215 are completely in check, since they include healthcare, vacation time, and complimentary *Beats* headphones for all new employees. He believes that this is

enough, commenting on how the only way to increase employee engagement further is to put more into the employees' salaries. This is a very significant disparity from what Mr. Vogel said.

2.4 - Personal Observations: We concluded primary research at 215's office with personal observations about the physical space, where we gained a sense of the atmosphere and environment in which the employees work. One of our main takeaways was that the office was sparsely furnished and inadequately painted. This in turn creates a very empty, vacant feeling which is clearly not a good environment in which to promote engagement and wellbeing. Certain facilities and furnishings could also be added to make the space more physically comfortable for the employees.

2.5 - Competitor Phone Interviews: From our interviews with prominent marketing agencies in the Philadelphia region, we were able to discover that these agencies valued the same thing 215 does - a unique culture and driven team. They believe these things are an asset to their companies, as does 215. For example, Tierney, another marketing agency in Philadelphia, describes their culture as "crazy, busy, and fun," their team as very close knit, and their working schedules and arrangements as very "flexible." 215 has a very similar culture, as evident from our prior research. It is proven that there is a direct correlation between employee engagement and customer loyalty. It is a competitive advantage to have better strategies to engage employees than other competing businesses. Therefore, it is imperative that 215 takes steps to ensure that its employee engagement strategy and culture is truly a core competency, in order to have the best chance at competing with these threats.

From all of this data, we were able to create a SWOT Analysis, a chart that summarizes all our findings into 4 distinct categories: Strengths, Weaknesses, Opportunities, Threats. Our SWOT Analysis can be found on the following page. This makes it easy to see exactly where *215 Marketing* stands in employee engagement in terms of these four categories.

Strengths	Weaknesses
<p>Excellent friendships with coworkers and a sense of common effort to reach their goals</p> <p>Employees know how their job positions help to better the company and its mission as a whole</p> <p>Perks such as healthcare, free coffee, free Beats headphones, 401k</p> <p>Culture of "work hard, play hard" (A fun environment balanced by significant hard work)</p> <p>Small company, Gallup research shows that companies of this size can have a slight advantage when it comes to employee engagement</p>	<p>Massive communication issues within the company</p> <ul style="list-style-type: none"> • Little transparency between employees and management • Miscommunication between management on how to handle employees <p>There isn't any long term engagement in place, as they are a startup - their entire strategy rests on perks/culture. They don't receive employee input on engagement levels on a continual basis.</p> <p>The excellent friendships with coworkers can also be disadvantageous</p> <ul style="list-style-type: none"> • They blur the line of a professional relationship between employee and employer • They encourage the workers to not take their jobs seriously enough <p>Employees don't have time to focus on individual strengths and they are extremely stressed (managers also)</p> <p>Room has plain white walls, no inspirational quotes, and overall needs layout work</p>
Opportunities	Threats
<p>Better horizontal and vertical communication</p> <p>It is best to implement a long term engagement strategy; perks and external benefits will only help employee morale for so long</p> <p>Create an engagement strategy that will sustain the startup as it scales and hires several more employees, which will inevitably increase the managers' stress levels more</p> <p>Scalable engagement strategy will ensure that the culture and team remain a core competency at 215</p>	<p>** Top three major competitors listed **</p> <p>Push 10 - They are creative, easy going, and spontaneous. They have a "lunch and learn" event every week, where the employees get together and one employee shares what he/she has been doing. Employees feel very in the loop, unlike 215's employees.</p> <p>NimbleLight - Their culture is relaxed, casual, and dedicated. They are an 8/10 on the closeness of their team. Everyone gives input and there is high collaboration.</p> <p>Tierney - Their culture is described as crazy, busy, and fun. They gave a 7 regarding how close their team is. They have great flexibility in terms of schedules and remotely working.</p>

B. Conclusions based on the findings

Our research study allowed us to extract one main idea, the core principle behind our entire project. 215 Marketing does not have a scalable, long-term employee engagement strategy. Their strategy for employee engagement is, for the most part, primarily for the short run. It mainly consists of external benefits and perks that only satisfy temporarily (as evident by the longest employee). These strategies cannot compensate for severe issues within the

company that will inevitably dissatisfy employees (like Lindsey), such as communication and transparency issues, as evident from our data. Although their culture leads to increased engagement, that culture won't be enough if underlying issues like stress and uncertainty are not addressed. There is also a direct correlation between how long an employee has worked and their attitudes on current employee engagement at the company, as seen from our employee surveys as well as our employee interviews. Outlined is a list of issues within the company that will affect employee engagement in the long term.

1. High levels of stress are apparent at this company. Because this company operates as a startup, all of the employees commented on the fear of uncertainty - they feel that their personal investment in the company is a bit unnerving since they don't know exactly where 215 will be in the future, and how their roles at the company might change. The management can take steps to eliminate this uncertainty. In addition, since there are very few people at the company, the workers have to do a variety of other tasks in addition to their primary job, resulting in added stress from the different functions they have to perform. While stress is part and parcel of the job, it is imperative that the employees have wellness programs as well as know the direction that the company is headed - this will all help to reduce work related stress, a major step to improving employee morale and engagement. Such stress relief programs will help 215 scale by making the process of acclimating new employees to the high-energy startup culture easy, as well as eliminate any possibility that their employees leave the company due to too much stress.

2. There are very little clear expectations and boundaries in regards to employee roles within the company. 215 has a very laid-back atmosphere in terms of strict deadlines and rules as well as in a hierarchy of authority. At this company, nobody truly considers anybody as ranked superior to one another, even though they are (Vogel and Gillin). This undermines the authority of the managers and makes the employees not want to heed their directions or advice. In addition, while the lack of strict regulations and deadlines makes employees feel very comfortable at their job, this also gives the employees the impression that their job should not be taken too seriously, as Vogel pointed out. For example, employees sometimes abuse the privilege of coming into work at a later time by coming in much too late, according to the managers.

3. There is very little transparency of company information between managers and from the managers to the employees. We were first introduced to this issue when the graphic designer Lindsey (longest employee) specifically

commented on how the managers sometime withhold important information from the employees. She revealed how she used to participate in finance meetings with the managers in the earlier days of the company, but as they have gotten bigger and more profitable, that has stopped. In addition, we gathered from our interview that Vogel and Gillin have two very different ideas of where their company stands in terms of employee engagement; Vogel stressed that there was room to improve whereas Gillin thought their engagement through perks and benefits was sufficient enough. It is very important that the managers keep the employees informed about the company's status frequently and that the managers have discussions amongst themselves to ensure that they are in agreement when it comes to business decisions.

4. No recognition is given for what the employees do. Mr. Jon J. Vogel describes 215 as a "thankless place." Employees are not recognized very much for their work, they are just expected to do it. Simple acts of acknowledgement on the manager's end would really help the employees strive for perfection in their tasks, to know that their work is appreciated. Vogel feels that this is a factor that sometimes hinders employee motivation and something that, if fixed, can take their employee engagement strategy from average to excellent.

5. Employees are not given opportunities to focus on individual strengths. As seen by Natalie and Lindsey's responses to our interview, employees are frequently required to complete tasks and perform roles outside of what they were hired to do, because the company cannot hire continuously. While this does have benefits, such as the increased learning opportunities as well as the opportunity to fully get to know all facets of the company, it also diverts their attention from actually improving their individual skill sets. In addition, our data supports the conclusion that as the employees get further settled within the company, the managers do not specifically help with or teach them what they need to do, something that can wear on an employee's nerves after a while, as seen by Lindsey's dissent.

6. Renovations in the office are needed. The office space merely consists of white walls; there is no color scheme or inspirational posters hanging around. This lack of office decoration and office renovations can make the space look and feel dull, and put a damper on employee moods as they are working. If we were to renovate the office and make it feel more lively, it would inspire the employees to feel more engaged in their work. In addition, certain changes to the office, such as a relaxation room, can offer physical benefits for the employees and allow them to feel more comfortable as they work.

Summary of Research Study

Research Method	Findings	Conclusions
<i>1.1 Gallup's Report: State of the American Workplace</i>	<ul style="list-style-type: none"> • Management is key to improving employee engagement • Managers need to focus on employees' strengths • Honeymoon period of employees is not indicative of true engagement levels 	<ul style="list-style-type: none"> → Employee engagement strategies will center around steps management needs to take → High levels of engagement may disappear as employees get "older" at the company if new strategies are not implemented → Daniel's high engagement levels can be attributed to the honeymoon period
<i>1.2 Website, social media, and blog research</i>	<ul style="list-style-type: none"> • 215 is currently a high-energy startup (started two years ago) • Inactive blog • Employees receive perks at work 	<ul style="list-style-type: none"> → 215's unique company culture needs to be preserved and conveyed to new employees → Need for a scalable, long-term strategy with methods of measuring engagement
<i>1.3 Google Reviews: Employee-Customer interaction</i>	<ul style="list-style-type: none"> • Customers gave highly favorable online reviews, calling the team "very helpful." 	<ul style="list-style-type: none"> → Despite employees engaging well with customers, productivity does not necessarily equate to engagement
<i>2.1 Employee surveys</i>	<ul style="list-style-type: none"> • Difference in attitudes between new and old employees (honeymoon period referenced in Gallup study) • Managers and employees are all great friends, maybe too close • Employees are not always "doing what they do best" at work, or know what is expected of them at work because 215 is a startup and employees have wear several hats 	<ul style="list-style-type: none"> → Longer an employee is at company, dissatisfaction grows, so we will create ways for employees to feel appreciated → Create distinction between friends and employees → We will provide employees opportunities, like blogging and speaking at conferences, in order for them to showcase their skills
<i>2.2 Employee Interviews</i>	<ul style="list-style-type: none"> • Employees are stressed • Take on lots of different roles because startup does not have capacity to hire continuously • Uncertain environment of a startup is worrying • Unorganized at times • No one to learn from 	<ul style="list-style-type: none"> → Create stress - relief programs to prevent employees from burning out and maintain high level of creativity required for the job → Allow employees to showcase their specific skills by going to industry conferences and writing on the company blog → Purchase online courses for employees to learn from → Remove uncertainty with company retreats that discuss company future and goals
<i>2.3 Manager Interview: Jon Vogel and Garrett G.</i>	<ul style="list-style-type: none"> • Lack of clear goals and expectations for employees • No line between employee and employer • 215 is a "thankless place" with little praise given out • Current employee perks include healthcare, vacation time, gym membership, the beats, etc. • Mr. Gillin believes that engagement could be improved with more money, Mr. Vogel believes 	<ul style="list-style-type: none"> → Change in management style to include being more thankful and setting clear expectations → We will create structure and organization in regards to employee roles in the organization → Implement engagement strategies that include effective communication, overall wellness programs, and clear boundaries that specify employee roles and responsibilities → There is an urgent need for better

	engagement won't necessarily come from "throwing money at the employees."	communication at the management level
<i>2.5 Personal Observations</i>	<ul style="list-style-type: none"> • The office space is sparsely furnished and inadequately painted • Desks are arranged in a circle for maximum collaboration 	→ Paint the walls, height-adjustable desks, and motivational posters will all contribute to a more comfortable environment
<i>2.6 Competitor Phone Interviews and Website Research</i>	<ul style="list-style-type: none"> • Several competitors claim to have a unique culture and they use some engagement tactics not found at 215 	→ Adopt the "Lunch and Learn" program from a competitor, Push10
<i>3.1 Internet Research - Engagement tactics</i>	<ul style="list-style-type: none"> • Physical and mental wellbeing are crucial for employees, especially in stressful environments like startups • Mindfulness is a relaxation technique employed by Google and other successful companies 	<ul style="list-style-type: none"> → Create mindfulness program → Give each employee a FitBit and go on daily walking meetings → We will create a marketing campaign for a local gym in exchange for membership (same with health food stores)

V. PROPOSED STRATEGIC PLAN

A. Objectives and rationale of the proposed plan

The main objective of this proposed plan is to address the main conclusions of the findings while also addressing the core goal of developing an effective long term strategy. A **long term employee engagement strategy** is a strategy that motivates employees to do their best and be committed to the company for the duration of their time at the company. It is done by addressing core issues within the company and by setting programs into place to ensure the strategy's longevity as well as scalability. We have organized our plan into specific goals - certain objectives that we hope will combat the main issues mentioned previously - and subcategories underneath those goals for specific activities. Addressing these goals will help eliminate gaping holes within 215 that could hinder employee engagement in the long term as well as create systems for improving engagement as the company scales. Below are our proposed activities along with our reasoning for each of them:

Goal #1: Create Wellness Program to Improve Mental and Physical Wellbeing

Proposed Plan	Rationale
Mindfulness	➤ Meditation-like practice utilized by major companies like Google that teaches employees how to reflect and de-stress. By allowing employees to calm down and reflect, they will be able to eliminate stress and increase emotional intelligence, thereby improving engagement. This will include the Mindfulness Room.

Gyms + Health Food Store Campaign	➤ 215 will create a marketing campaign for a local gym and manage their account in exchange for gym memberships. They will do the same for a local health food store. Will increase employees' overall wellbeing, thereby reducing work stress.
Morning Walks with FitBit	➤ All employees will receive a FitBit and every morning, the team will go on a walk together, which will double as a meeting to kick off the day. Steve Jobs was a proponent of walking meetings, as they can often lead to creative ideas. This will help the employees get a positive head start to their day and get them motivated to work.
Tri-yearly Company Retreat	➤ These retreats will serve as "big picture meetings" to communicate to employees the future of the company and the general direction it is headed in. These retreats will mimic the Apple 100 retreats and will aim to eliminate the stress that comes with working in an uncertain environment.

Goal #2: Increase Communication Between Staff

Proposed Plan	Rationale
Monthly Employee Progress Meetings	➤ By periodically having meetings with the managers and employees present, employees will always be updated with the latest information about the company. They will feel included in company affairs and there will not be any resentment that comes from withholding information from the employees.
Manager Meeting	➤ The two managers can also have monthly meetings as well. By increasing the number of meetings the two managers have, it ensures that they will always be in agreement when it comes to important policies and things of that nature. They also need to have a meeting in which they lay down engagement policies and ensure that they are on the same page.
Monthly engagement survey	➤ Monthly engagement surveys will force the management to take notice of issues that are important to the employees, and force them to implement change. (TINYpulse offers these surveys)
"Lunch and Learn"	➤ Bi-monthly, lunch is catered to the office and one employee talks about what they've been working on, can discuss side project, talk about finances, etc. Will serve to increase communication by keeping employees in the loop.

Goal #3: Increase Acknowledgement of Employee Accomplishments

Proposed Plan	Rationale
iDoneThis	➤ iDoneThis is a computer program that sends employees emails every evening asking what they accomplished, and sends everyone an email in the morning detailing everyone's accomplishments. This will increase recognition of accomplishments within the office and make them apparent to managers.

Goal #4: Give Employees Opportunities to Focus on Individual Strengths

Proposed Plan	Rationale
Industry Conferences	➤ Industry conferences will allow employees to speak about their talents and skills to others; it will give them a sense of purpose as well as give them a chance to focus on their individual talents.
Blogging, Speaking, Writing	➤ Blogging, speaking, and writing will allow for the employees to showcase strengths much like the employee conferences
Online Courses	➤ Online courses will allow the employees to continue learning about the skillset they were hired for, something extremely important as they have to multitask between many different roles in addition to not getting the guidance they need to perform the work specific to their job description.
10% time	➤ Giving the employees side time to work on their own projects helps them create innovative projects and ideas using their own unique talents.

Goal #5: To Establish Clear Expectations/Standards for the Employees

Proposed Plan	Rationale
Develop Core Values	➤ General Core Values will keep the employees in line with the company's goals and what the company expects them to do. These values will mimic core values like Amazon's Leadership Principles and Zappos Core Values. Will be useful as the company grows and needs to communicate culture to new employees and interns.
Sit-Down Discussion About Employee Roles	➤ At the first company retreat, along with big picture discussion, each employee and manager can have a sit down discussion defining each person's role within the company. This is meant to define employee roles and role expectations in a non-combative way so everyone is on the same page about where they stand in the company.

Goal #6: Renovate the Office Space

Proposed Plan	Rationale
Paint walls (one teal)	➤ The teal wall will have the same shade as the company's official color, promoting connection to the company as the employees' work.
Motivational Quotes Posters	➤ The motivational quote posters will be present in prominent locations throughout the office that will encourage employees to do their best and try their hardest.
Height - Adjustable Desks	➤ The ability to stand while one is working can help them be more creatively stimulated. Remaining stationary in one place for long periods of time may hinder this.
Mindfulness Room Renovation	➤ After the employees learn more about how mindfulness can reduce stress and increase productivity, a small room in the back of the office (currently not

being used) will be used as a "Mindfulness Room" where employees can go and practice quiet and peaceful relaxation and mindfulness.

B. Proposed activities and timelines

Goal #1: Reduce Employee Stress Levels

Our first goal for reforming 215's employee engagement is to reduce the stress levels of the employees, an issue that definitely starts to wear on the employees as they get more settled within the company. To address this matter, we will have the employees practice mindfulness, implement a gym and health food store campaign, go on daily morning walks with their new Fitbits, and participate in tri-yearly company retreats.

Mindfulness: Mindfulness is the practice of being aware of one's surroundings and being fully within the present moment. When faced with stress and anxiety, mindfulness helps employees acknowledge all of their thoughts and feelings at the current moment. This act of staying in the present helps people focus on what is important, as opposed to stressing about the past or future. Many major companies including Aetna, Target, and Google have all invested in programs to foster and encourage this technique within their employees. Mindfulness can help the employees of 215 to increase focus and productivity of their workers while decreasing work related anxiety. To gradually introduce the frequent practice of mindfulness, we will first have the employees take the free *Online Mindfulness-Based Stress Reduction (MBSR)* course to give them background knowledge of what mindfulness actually entails. Then we will have a designated room within the office where the employees can practice meditation or even just sit quietly while taking in their surroundings. Ideally, this would be about 5-10 minutes in duration for about 2-3 times a day. This will ensure that the effects are beneficial, yet they do not take significant portions of time out from the employees' work schedules.

Gyms and health food store campaign: In addition, to further reduce stress through overall wellness, 215 will work with a local gym and health food store and conduct a marketing campaign for them in exchange for the use of their services. One such gym that is located near the office is *City Fitness Philadelphia*. In addition, *Natures Nutrition Center* is a prominent grocer in the area which sells nutritional groceries, supplements, etc. By offering these services to their employees, 215 will increase overall well being (physical and mental), which has a direct correlation to stress.

Morning Walks with Fitbit: Each employee will receive a complimentary *Fitbit*, a small device that keeps track of personal activity metrics, such as the amount of steps taken. We propose having the employees, along with the

two managers, go on morning walks with their Fitbits before they go to work. The light exercise, morning sunlight, and relaxation time will allow for the employees to start the day off with much less stress to begin with. In addition, the managers can talk to the employees about recent news, goals for the day, etc. to help the employees get the creative stimulation they need to be productive the rest of the day. Furthermore, Fitbits can foster healthy competition amongst the team as each individual aims to achieve the most number of steps.

Tri-yearly company retreat: We also propose a company retreat three times a year with all the managers and employees. They will serve as "big picture" meetings- they will address the problem of the stress due to an uncertain future of a startup model. These meetings will help alleviate that anxiety and keep the employees updated on where the company is headed for the future and their long term goals as well. The first meeting will also serve as a discussion of each employee's role within the company. The employees will all go to a common location for a few days to discuss all these important topics.

Goal #2: Increase Communication Between Staff

Our second goal to reform 215's employee engagement strategy is to increase communication between the 215 staff. The company has major transparency issues which seriously frustrate the employees. This reform is essential. As part of this goal, we propose that they have monthly employee meetings, monthly manager meetings, and a monthly engagement survey.

Monthly employee meetings, manager meeting: Transparency will improve if there is a formal monthly meeting held with all of the employees and managers present as well as a managers-only meeting. These employee meetings will force the managers to keep the employees informed with current information frequently and as it becomes available, and the manager meetings will force the managers to be on the same page as well.

Lunch and learn: These lunch and learns will be bi-monthly. Food will be catered to the office and each employee will talk about news or any side projects they have been working on. This will help keep employees in the loop and increase engagement over all.

Monthly Engagement Survey: In addition, a monthly employee engagement survey will be given to all the employees and the results will be given to the management for review, to ensure that employees are still engaged and have no new issues. This engagement survey will be much like the one we administered to the employees through our

research, because the questions assess all levels of engagement and provide a very comprehensive view of engagement and employee morale at the company from all different angles (stress, working with a purpose, etc.)

Goal #3: Increase Acknowledgement of Employee Accomplishments

While this can be a rewarding job experience for the employees that internally motivate themselves and take it as so, Mr. Vogel does describe 215 as a “thankless place.” It is clear to us that certain measures need to be put into place so that the managers can honor the employees frequently for what they are doing right for the company. This will give them satisfaction that their superiors notice their work efforts, as well as encourage them to continue serving the company in a positive way.

iDoneThis: One of the major ways we plan to increase acknowledgement of employee success is through the iDoneThis online program. Basically, this program sends an email every evening to the employees asking them to detail what positive things they accomplished at work for that day. The program compiles all the responses and the next morning, iDoneThis sends an email to everyone with everyone’s responses from the previous day. This will give them both the opportunity to reflect as well as gain a head start to the day by reading how productive of a day yesterday was. In addition, it serves to make sure the employees feel valued even if the managers are not available to them observe their hard work all the time and makes their accomplishments known to the other employees.

Goal #4: Give Employees Opportunities to Focus on Individual Strengths

With the nature of a startup being very paced and experiencing so much growth in a short amount of time, it is often necessary for employees to take on many other roles in the company from time to time. In addition, because running a startup takes so much time, the managers often cannot find the time to teach the employees about their jobs as the employees lengthen their tenure throughout the company. These are the two main complaints we heard in this category.

Industry Conference: It is a well known fact that employees that are given the opportunity by their employers to speak about their professional skills and talents are often more engaged when it comes to the workplace. While the company does send them to listen in on certain lectures and conferences, we believe the company will benefit more if the employees are actually allowed to speak of their skillsets at these conferences, such as those hosted by the *Business Marketing Association*.

Blogging, speaking, and writing: Much like the industry conference, giving the employees the opportunity to generally blog and write about their skills will also be effective at showcasing their individual talents, even when there are no industry conferences to attend. It will also benefit the company overall, as the 215 blog has been inactive for over a year. Employees will specifically blog about topics related to their line of work, for example, a graphic designer talking about his/her favorite computer aided design programs to use.

Online courses: One of the major concerns we received from our primary research phase was that as the employees get more advanced and experienced within the company there is often no one to learn from or receive guidance from anymore, which makes the employees feel undervalued and unimportant, even as a long standing member of the team. With online courses tailored to their specific job descriptions, such as the website *Open Sesame*, the employees will be able to continue learning about the specifics surrounding their jobs even when no one can explicitly teach them.

10% time: An employee engagement tactic that is used by Google, 10% time involves giving employees a bit of side time and creative freedom to let them engage in their own projects. By allowing 215 employees to work on side projects, it will impart in them a sense of achievement and allow them to sharpen their skills in their area of expertise.

Goal #5: To Establish Clear Expectations/Standards for the Employees

Establishing clear guidelines, expectations, and rules for the employees to adhere to keeps them on task and focused. Ultimately, the employees who are the most focused and less distracted tend to be the most productive. The managers revealed that setting somewhat strict rules and relationships with the employees that are still work professional is very important.

Develop Core Values: This is our main method in reforming this category. Amazon has its list of key core values they encourage their staff to adhere to, to make their impact on the organization more meaningful. Having 215 do the same will help the employees serve with certain indicators and goals in mind- "expectations" for how their work ethic and performance should be.

Sit Down Discussion About Employee Roles: At the first company retreat in Hershey, Pennsylvania, in addition to talking about the general direction of the company, there will also be a discussion between every manager and employee defining the employee's role, the manager's role, and how their roles work together to benefit the company and

get the job done. This will address the issue of the employees not respecting the boundary between employee and manager - by doing this at a company retreat in a completely casual discussion, there will be a non combative conversation about where they stand in the company.

Goal #6: Renovate the Office Space

It is a known fact that the environment one surrounds him or herself in can impact mood and productivity. According to Harvard Business Review, "Workplace design can make higher levels of employee engagement more likely. Honest design, spaces that reflect employees' needs and concerns, is something that employees notice, interpret, and value." As of now, the office is messy, plain, and not suited to help the office environment and attitude. In addition, renovating the office in certain ways can help employees feel physically comfortable, ensuring that they do not stop working because of physical discomfort. Forbes makes the excellent point that "In the "there's always more work to do" lives of small business owners and employees, more often than not, you stop working because you feel physically compelled to." Therefore, reforming the office space can have a profound effect on engagement.

One Teal Wall: One of the official colors for 215 is teal. Therefore, because the walls are just a plain shade of white right now, we believe that adding one teal wall increase excitement and passion about the company more than there already is.

Motivational Quotes Posters: These posters, about 3 of them, will have inspirational quotes about hard work, motivation, or any other underlying themes that encourage the employees to work harder and strive for a common goal.

Height- Adjustable Desks: This is such a simple, yet profound change. Being able to sit and stand whenever one pleases can help tremendously with boredom, creative stimulation, and just with the need to stretch the legs for a little bit. All of these can help with the need to remain physically comfortable in order to continue working.

Mindfulness Room: Currently, there is a room in the office that is not being used for anything in particular. By transforming this into a "Mindfulness Room," this will allow the employees to go in for a few minutes at a time to sit quietly and reflect on their thoughts, which will allow the employees to relieve the stress that comes with working. We plan on painting this room green, adding benches, living plants, pillows, and providing yoga mats in case anybody wants to practice yoga.

Timeline:

Our plan will start its activities over a one year period. However, our strategy is designed to be continued in the long term, so after all of our proposed activities are up and running, they will continue even after the one year is over. Our one year initial plan is broken up into three intervals, each consisting of four months of activities, as shown below.

Proposed Activities
<p>June 2016 - September 2016</p> <ul style="list-style-type: none"> <input type="checkbox"/> Daily morning walks with Fitbit begin <input type="checkbox"/> Have employees complete the online, eight week, <i>MBSR</i> program. They will watch one video, read one article, and complete one practice sheet per week during this month- each week relating to a different topic on mindfulness. <input type="checkbox"/> <i>City Fitness Philadelphia</i> and <i>Natures Nutrition Center Campaign</i> <input type="checkbox"/> <i>Business Marketing Association</i> conference <input type="checkbox"/> Tri Yearly Company Retreat in August. Staff will go to Pymatuning State Park (in Pennsylvania and part of Ohio) for camping. <input type="checkbox"/> Introduce 10% time <input type="checkbox"/> Introduce "Lunch and Learn" <input type="checkbox"/> Monthly manager meetings begin <input type="checkbox"/> Monthly all-staff meetings begin <input type="checkbox"/> Employees will begin blogging on the 215 website <input type="checkbox"/> Monthly employee engagement surveys begin <input type="checkbox"/> Renovations to construct the "Mindfulness Room" <input type="checkbox"/> Begin the daily <i>iDoneThis</i> email program
<p>October 2016 - January 2017</p> <ul style="list-style-type: none"> <input type="checkbox"/> Establish key core values and explain them to the rest of the employees <input type="checkbox"/> Tri yearly company retreat in November to Atlantic City <input type="checkbox"/> Office renovations (motivational quotes posters, height adjustable desks, and one teal wall) <input type="checkbox"/> Start <i>Open Sesame</i> online training courses <input type="checkbox"/> Continue "Lunch and Learn" <input type="checkbox"/> Continue 10% time <input type="checkbox"/> Continue monthly employee engagement survey <input type="checkbox"/> Daily morning walks with Fitbit continue <input type="checkbox"/> Monthly manager meeting <input type="checkbox"/> Monthly all-staff meeting <input type="checkbox"/> Continue blogging
<p>February 2017 - May 2017</p> <ul style="list-style-type: none"> <input type="checkbox"/> Industry Conference number 2- Business Marketing Association Conference <input type="checkbox"/> Tri Yearly Company Retreat in May to the Jersey Shore <input type="checkbox"/> Continue <i>Open Sesame</i> online training courses <input type="checkbox"/> Continue "Lunch and Learn" <input type="checkbox"/> Continue 10% time <input type="checkbox"/> Daily morning walks with Fitbit continue <input type="checkbox"/> Monthly manager meeting <input type="checkbox"/> Monthly all-staff meeting <input type="checkbox"/> Employee Engagement Survey <input type="checkbox"/> Continue blogging

C. Proposed metrics or key performance indicators to measure plan effectiveness

One method that will be used to measure employee engagement quantitatively is through **administering the same survey given to employees during our primary research** at the end of each calendar year. The survey will be useful in measuring how well our plan addressed important aspects of long term engagement, by measuring how much the employees' average numbers increased from before. Using each employee's averaged score from our original survey, we determined that increasing each employee up to a 9.5 averaged score would be a good indicator that our plan was effective in improving employee engagement. The rationale behind this chosen benchmark of 9.5 is that Daniel's average score was a 9.6 when we administered the survey, and at this point, he had been working for one week. This score is indicative of employee engagement present during the honeymoon period, the time period when employees are new on the job. Maintaining this level of engagement, rather than have it decrease as employees get "older" at work, is highly beneficial. While Daniel needs to maintain his level of engagement, as he initially scored a 9.6, Natalie would need a 15.9% increase to go from a 8.2 to a 9.5, and Lindsey would need a 25% increase to go from a 7.6 to a 9.5. If these levels are met, then our proposed plan will be considered successful.

In addition to the monthly engagement surveys mentioned in our plan, another metric is a **year end meeting** for all the staff and employees. At the end of each calendar year, the employees will come together with the managers to discuss the previous year's accomplishments, specifically in relation to the plan put in place. Through this year end meeting, the staff will be able to analyze how well our proposed plan worked for employee engagement in relation to the 6 goals we established. They can also establish new plan ideas and goals for the upcoming year to ensure that this type of an employee engagement plan is continued for the future, which is the goal for this plan in the first place.

VI. PROPOSED BUDGET

Costs associated with proposed strategies

We attempted to create a plan in which costs were minimized and positive results were maximized. As a startup, 215 will not be able to allocate large amounts of money to employee engagement, but every dollar they do invest should have profound results. All activities not mentioned below are free of charge.

Mindfulness: The room renovations for the "Mindfulness Room" will consist of green walls, benches, a few live plants, and pillows. The cost for painting a room (when labor, paint, and extra materials are added) is approximately

\$450. The cost of one Duke Wood Bench is \$195.85, and if we were to add three, the cost would total \$587.55.

Chinese evergreens are known to reduce stress and improve attentiveness. One plant of this type would cost \$13.98, so adding 6 of these plants in the room would cost \$83.88 in total. One single threshold pillow costs around \$20, so adding 7 of these would cost \$140. So the total cost for the Mindfulness Room renovation is \$1261.43.

Gym and Health Foods Store Campaign: Because a gym membership costs around \$250 a month, their marketing campaign will also cost \$250 a month. Combined with the health foods stores campaign, the cost should total around \$500 a month, so for a whole year is \$6,000.

Fitbits for the daily morning walks: The average Fitbit costs \$100 per unit. If 3 employees and 2 managers need these, the total cost will be around \$500.

Tri-yearly Company Retreats: Retreat number 1 to Pymatuning State Park consists of a cabin and food cost. Food for each person is around \$100, so five staff members will equate to \$500. The cost for a two bedroom cabin with a capacity of 6 people is \$55.66 per night, so for 2 days that is \$111.32. Retreat number 2 to Atlantic City will cost \$500 for food again, as well as as around \$1100 for a 1 night stay for 2 rooms at *Borgata*. The meeting room will cost around \$150 at the same location. Retreat number 3 will be to the Jersey Shore, on the beach. *The Grand Hotel of Victorian Cape May* is \$336 for two rooms, \$250 for a conference room, and \$500 for food. This all totals to \$3,447.32, which comes out to approximately \$700 per employee per year.

Lunch and Learn: \$100 for one lunch, so \$200 per month. Per year, this equates to \$2,400.

iDoneThis: The iDoneThis program for an organization/business costs \$38.25 per month. For our one year plan, this will amount to a total of \$459.

Industry Conference: The two industry conferences we plan to attend in fall 2016 and and spring 2017 will both be hosted by the *Business Marketing Association*. While their specific dates and conference titles have not been released yet, their past conference rates have been around \$1,096 per person. Each employee will have a cost of \$1,096.50. Each conference will be \$5,482.50. The total for both of these conferences is \$10,965.

Online Course: The average online video on Open Sesame costs around \$30. Assuming an employee watches a video once every two months, the cost per employee is \$120 for the one year plan (4 months of videos from when they start in October). Multiplied by 3 employees, this total comes out to be \$360 for the one year plan.

Teal Wall: Painting one wall teal will cost around \$30.

Motivational Quotes Posters: 3 posters with motivational quotes posters will cost around \$45.

Adjustable Desks: Each desk costs \$700 - multiplied by 5 employees is \$3500.

Total budget: \$28,967
Per employee cost: \$5,793

Also, according to a Harvard University wellness study, employers can save up to \$3.27 in health insurance for every \$1 they invest in wellness programs. As such, 215 can potentially save **\$21,255** in health insurance.

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VIII. APPENDIX

To Whom It May Concern,

This past Monday, Aanchal Aich and Anjali Agarwal visited the office of my company, 215 Marketing, located in Philadelphia, to conduct primary research for their DECA project. The girls were polite, diligent and very focused on the task at hand. It was a pleasure to receive a visit from current LHS students!

Jon J. Vogel

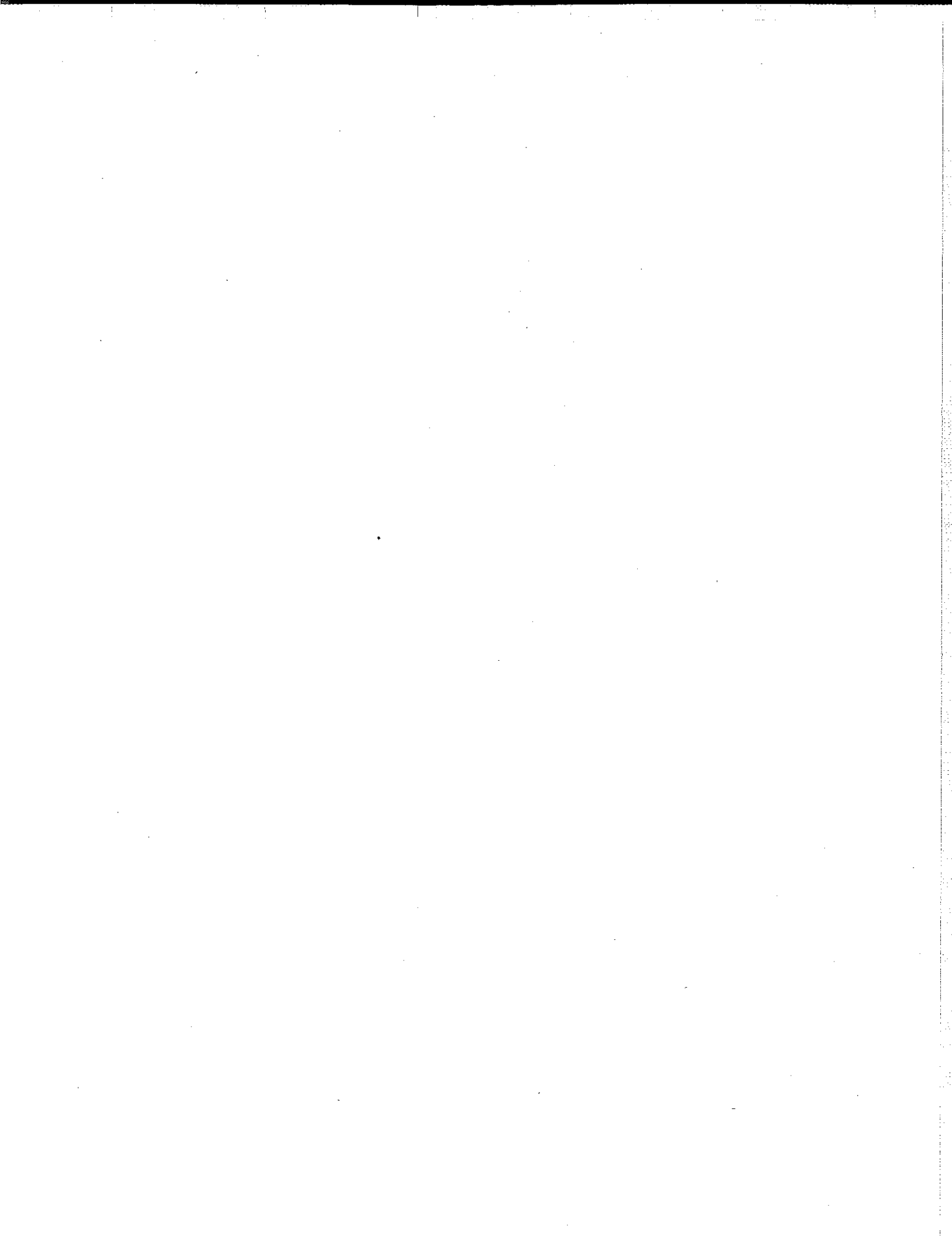
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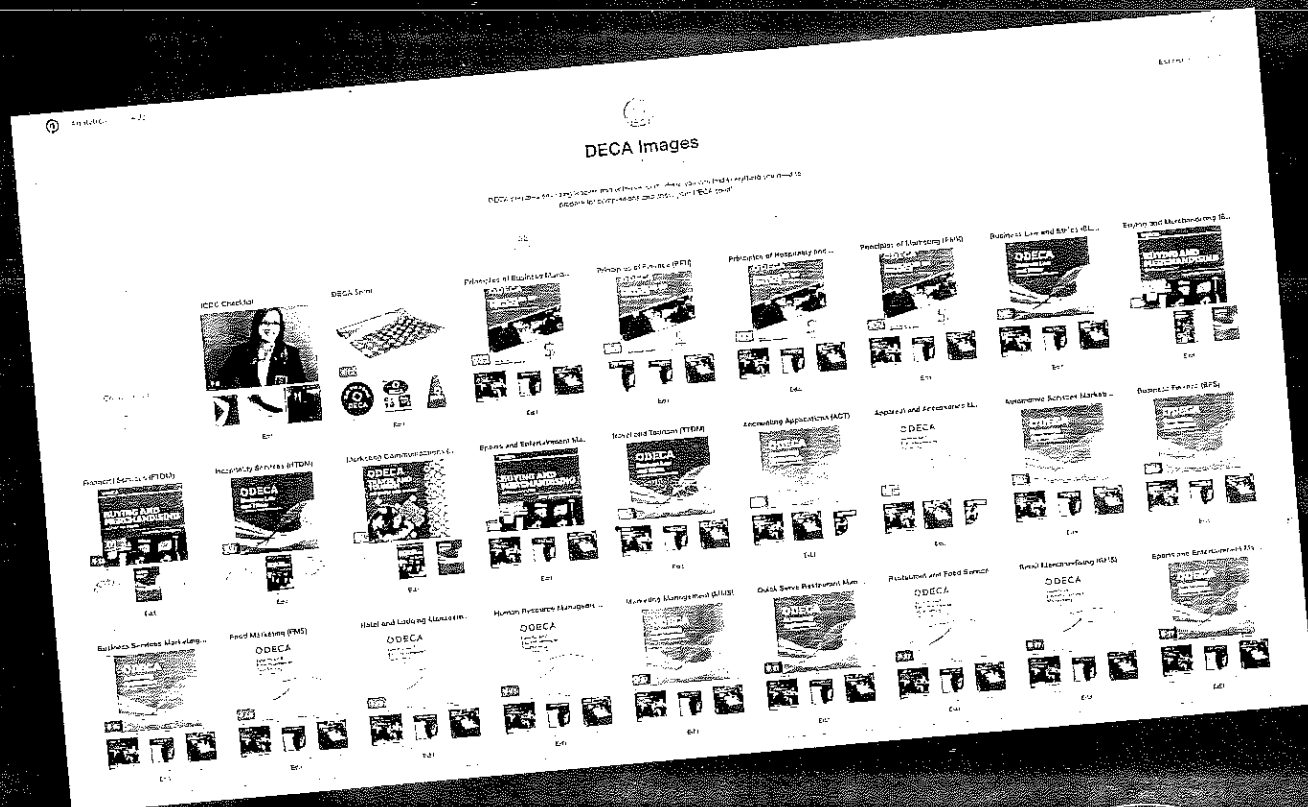
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1st PLACE

AMANDA ALBERTELLI

ALEXA ROSEN

JARED WOLFF

Plainview-Old Bethpage JFK High School, NY

2017

INTERNATIONAL CAREER
DEVELOPMENT CONFERENCE

BUSINESS SERVICES OPERATIONS RESEARCH EVENT

Improving SoLoMo Promotion at Paw Seasons



Plainview Old Bethpage John F. Kennedy DECA Chapter

Plainview Old Bethpage John F. Kennedy High School

50 Kennedy Drive

Plainview, New York 11803

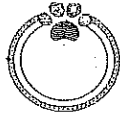
Amanda Albertelli, Alexa Rosen, Jared Wolff

April 2017



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I. EXECUTIVE SUMMARY

Business Description

Paw Seasons is a luxury pet hotel and spa founded in 1993 by Dr. Neil Weiss. It is located in Plainview, New York and offers many services that satisfy the needs of pets and their owners such as grooming and boarding options. Paw Seasons' target market consists of local pet owners who travel often and need a safe place to leave their pet.

Paw Seasons also targets pet owners with high discretionary incomes.

Problem

With technology advancing, Paw Seasons does not have a sophisticated social, local, and mobile (SoLoMo) promotional campaign in place. Currently, Paw Seasons utilizes very little local and mobile promotion, and does not have up-to-date social promotions. It is crucial for Paw Seasons to develop a SoLoMo campaign that will keep up with growing technology trends in order for the business to thrive, develop increased brand awareness and ultimately increase profitability.

Research and Findings

In order to craft an innovative SoLoMo campaign, we conducted both primary and secondary research, as shown on the chart to the right. We interviewed Ms. Tami Tappan, the marketing coordinator of Paw Seasons, who helped us develop a survey that we distributed to existing customers. For instance, we found out that 97% of customers felt that Paw Seasons should create a mobile app, and 96% of customers felt that Paw Seasons should partner with a charity. Additionally, we found out that an underwhelming 19% of customers have actually visited Paw Seasons website. From these findings, it was evident that Paw Seasons was lacking the effective promotional strategies they need in order to thrive in this day and age. Through secondary research and survey analysis, we gained a stronger understanding of social, local, and mobile promotions Paw Seasons could utilize.

FINDINGS

Primary Secondary Results



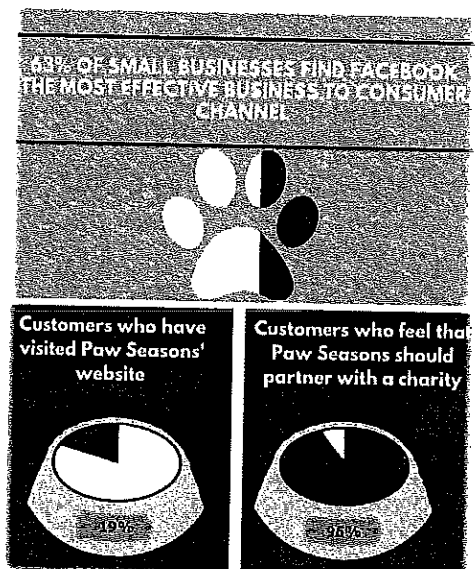
Conducted a survey and interviews



Extended research with different articles and conducted interviews



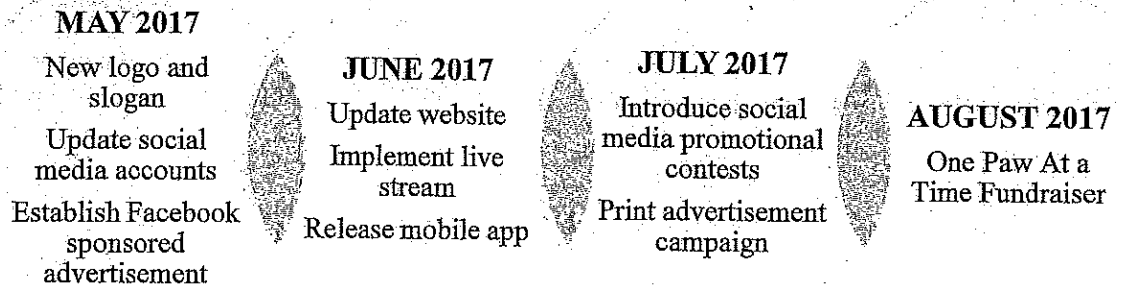
Analyzed and interpreted the information discovered





Proposed Plan

After analyzing our research and findings we developed the SoLoMo campaign consists of the following activities:



Metrics

Once the SoLoMo campaign was implemented, it was necessary to evaluate the success of the plan. Paw Seasons should use the return on investment formula to calculate the quantitative success of their SoLoMo campaign. Additionally, Paw Seasons should count the number of likes, comments, and followers to determine the success of the social media accounts. Also, comments can indicate customer feedback. By using similarweb.com, the number of visits the website has received can be determined. To evaluate the success of Facebook Live and the livestream, the number of views can be counted and the success of the Facebook sponsored advertisements can be found through Facebook Analytics. In addition, the success of the walk can be determined by taking attendance, the success of the coupons can be found by counting the number of coupons used, and the success of the promotional contests can be found by counting the number of contestants. Lastly, the success of the mobile app can be evaluated by counting the number of downloads it has received.

Proposed Budget

The projected total cost of the suggested SoLoMo campaign is \$2,068.77. Our projected figure is less than half of the budgeted amount of \$5,000. By implementing our SoLoMo campaign, we believe that Paw Seasons' sales and customers will increase, therefore outweighing the cost of this proposal and proving the campaign beneficial.



II. INTRODUCTION

A. Description of the business or organization

Paw Seasons, located in Plainview, New York, is a pet hotel and spa that was established as an extension of The Manetto Hill Animal Hospital in 1993. Dr. Neil Weiss founded Paw Seasons because of his passion and devotion for animals. He felt the need to create a place with a pet-loving atmosphere with employees who go above and beyond to create a quality experience for pets.



Paw Seasons is located at 122 Manetto Hill Road in Plainview, NY. It is next to the Manetto Hill Shopping Center, a highly populated area on a main road and near an expressway. The ambiance of Paw Seasons is beyond welcoming. The doors swing open and customers know they have found their pet a “home away from home.” Paw Seasons offers luxurious pet hotel and day spa accommodations that ensure care and quality treatments for both dogs and cats. Paw Seasons was created to offer more services for The Manetto Hill Animal Hospital's clientele.

The target market of Paw Seasons consists of local pet owners, specifically those who travel frequently without their pets. Although most pet owners get anxious when they leave their pet for an extended amount of time, Paw Seasons offers a unique kind of love and care that no other facility can compare to. Since there is only one location in Plainview, NY, it is only targeted geographically to people who live there or in surrounding areas. Additionally, it targets those pet owners that have high discretionary incomes (\$100,000+) and consider pet ownership and a pet spa/daycare as a reasonable expense. Furthermore, Paw Seasons targets people who value luxurious services and accommodations for their pets. The benefit of Paw Seasons is that it creates a lavish hotel for pets that eases pet owners' worries when not at home.



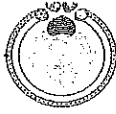
Paw Seasons has a passionate staff of 22 people. There are two ambitious and intelligent doctors, who will treat any ill pets during their stay. The hotel also features two veterinary technicians who assist the doctor. They have one hospital administrator, who performs “behind the scenes” tasks, including keeping the facility in pristine condition. Paw Seasons has an enthusiastic and accommodating office and a client relation’s manager who cares for any client and employee issues. Additionally, Paw Seasons has both a hotel manager and marketing director who are responsible for running the hotel and creating promotional material for the business respectively. Eight devoted staff members care for the animals to create a caring atmosphere during their stay. Additionally, there are four receptionists and two groomers. Paw Seasons is efficiently staffed to accommodate the needs of their customer base.

Paw Seasons hours are accommodating to its customers. It is open Monday through Wednesday between the hours of 8:30am-8:00pm. On Thursday and Friday, the hours are 8:30am-5:00pm and on Saturdays the hours are 8:30am-1:00pm. Lastly, while grooming services are unavailable on Sundays, the staff continues to diligently care for pets that are boarded.

Paw Seasons provides many luxurious services in order to create an amazing, one of a kind experience such as:

- 🐾 High quality grooming and spa service, using the highest quality products for pets
 - 🐾 Joint massage and bathing procedure
 - 🐾 Professional cut and blow for the pets
- 🐾 Dog and cat boarding for customers who need a place for their dog or cat to stay
- 🐾 Pets will be showered with love and attention all day while being exercised and fed

The prices of the services vary depending on the size of the pet. Grooming is based on the weight of the pet and can range from \$30 to \$100. The hotel rate is a per night fee, which varies

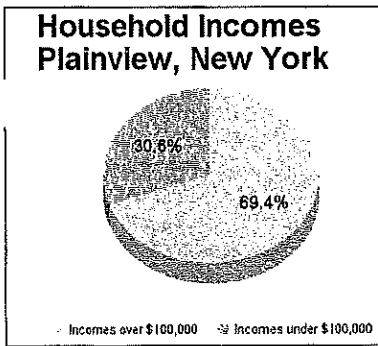


from \$30 to \$55 depending on if the customer prefers their dog to stay in a crate or remain without a crate.

B. Description of the Community

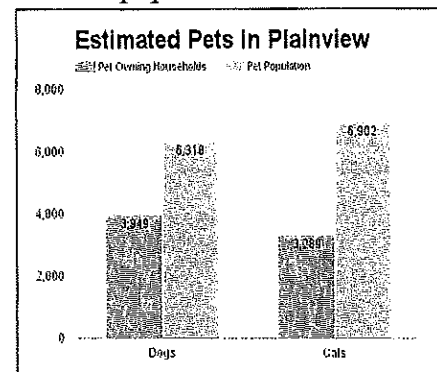
Paw Seasons’ sole location is located at 122 Manetto Hill Road in Plainview, New York. Manetto Hill Road is a busy street located in close proximity to the Northern State Parkway and the Long Island Expressway, making it convenient for customers in neighboring towns, such as Syosset and Woodbury, to frequent the business. Paw Seasons’ eye catching sign is very hard to miss. The location is surrounded by a variety of other popular stores in Plainview including Dunkin’ Donuts, Carvel and Bella Vista, a popular pizza place in the community.

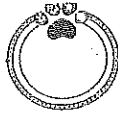
According to the *United States Census*, 28,127 people reside in Plainview. Amongst Plainview residents, 69.4% have incomes over \$100,000, as displayed in the graph to the left.



This statistic is crucial to the success of Paw Seasons because the business is in a town where people have a high discretionary income, enabling them to pay for the luxurious services the facility provides. Also, people earning higher incomes typically vacation more often thus having a necessity to board their pet at Paw Seasons while they’re away.

Additionally, the estimated pet population in Plainview is very high. The American Veterinary Medical Association (AVMA) created a formula based on the population of a community to determine the estimated pet population. In addition, they also established a formula to determine how many households in a given community own a pet. This formula was utilized to determine the pet population and the results are shown on the graph to the right. These numbers are





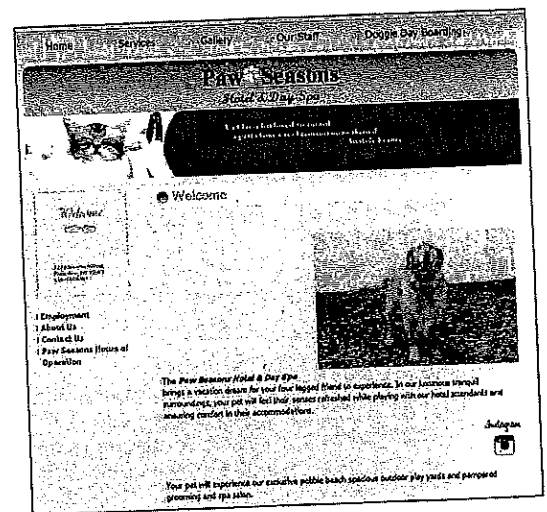
pivotal for Paw Seasons since their business depends on the population of these animals to sustain a successful business. It also indicates that the community is a pet friendly environment.

C. Overview of the business or organization's current promotional strategies and practices

In today's competitive business world, promotions are a vital aspect to success. The purpose of a business' promotional strategy is to inform potential customers about their products or services and entice current customers to purchase more products or services for consumption. Promotions are also used to create a positive reputation for a business, as well as to persuade customers that their products and services are reliable. Powerful promotions are vital in order to attract the customer base needed to make a profit. Paw Seasons currently has very minimal promotions. According to Ms. Tami Tappan, the marketing director at Paw Seasons, "Our local promotion is solely giving out coupons to existing customers."

Paw Seasons also has an annual fundraiser called Paws of Love. The purpose of this fundraiser is to allow people to adopt dogs at their local location.

While Paw Seasons has a website, it has not been updated since 2014, as shown in the photo to the right. There is an accessible link on the website to the business' Twitter page which only has nine followers and has not been used in nearly three years. Additionally, the handle for Paw Seasons is @manettohillanim, which can be extremely difficult to find and does not bring about brand awareness for Paw Seasons itself. They also have a Facebook page, which is their primary social media platform. While they are active on Facebook, much of their customer base is unaware that it exists because a link for the Facebook site cannot be found on their website.





The website includes photographs of dogs via Paw Seasons' Flickr account. Although they have three photo albums on their account, they still do not have any followers and they do not follow anyone. Finally, the website includes a small Instagram logo in the corner, and when clicked, you are directed to their Instagram page. However, this link is difficult to find on their website, and the Instagram account itself only has 21 followers, 0 following, and 6 posts dating back to 2014.

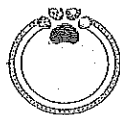
Paw Seasons lacks mobile promotion. Cell phones are a prominent aspect of society today and, without any type of mobile promotion, they cannot fully reach their target market.

Lastly, Paw Seasons relies strongly on "word of mouth" promotion. As the customers enter the facility, they are welcomed by kind hearted staff members. With the extraordinary treatment their pets receive, customers are sure to tell their friends and family about this one of a kind experience. As word spreads, Paw Seasons has received more customers to their facility. Although word of mouth promotion is essential, it is not enough for Paw Seasons to solely rely on if they hope to expand their clientele and ultimately their profits.

III. RESEARCH METHODS USED IN THE STUDY

A. Description and rationale of research methodologies selected to conduct the research study

In order to improve Paw Seasons promotional strategies, we needed to gather a substantial amount of both primary and secondary source information. Primary research can be used to answer specific issues or questions. It can involve questionnaires, surveys or interviews with individuals or small groups. On the other hand, secondary research consists of reports and studies by trade associations, government agencies, or other businesses within the industry. Both the primary and secondary research we obtained was critical in helping us create a new social, local, and mobile promotional plan.



Primary Source Research

Interviews

1) Ms. Tami Tappan: Marketing Director, Paw Seasons

Rationale: It was essential to interview Ms. Tappan because of her knowledge of Paw Seasons' target market and past promotions. We were able to use her insight to understand the current promotional plan of the business and to create optimal social, local, and mobile promotions the business could use in the future.

2) Mrs. Lindsay DeLuca: Business Teacher/DECA Advisor, POBJFKHS

Rationale: Interviewing Mrs. DeLuca was critical in order to gain more knowledge on the concept of promotion. With her guidance, successful SoLoMo promotion strategies were clearly understood and we were able to apply this newfound knowledge to benefit Paw Seasons' promotional strategies.

Surveys

1) Paw Seasons Customer Survey

Rationale: Distributing a survey to 52 Paw Seasons customers assisted us in acknowledging what current promotional strategies were successful and unsuccessful, which was vital in the improvement process. Additionally, the results of the survey were beneficial as they provided us with the customers' opinions on Paw Seasons potential promotional strategies.

Secondary Source Research

1) Census Bureau Website

Rationale: By referencing the Census website, we were able to collect demographic information relating to Paw Seasons target market. We then analyzed this data and applied it to our primary objective, improving Paw Seasons promotional strategies.



2) Paw Seasons Website

Rationale: We referenced the Paw Seasons website throughout the development of our campaign. Using the information on the website, we obtained background information of the business itself and evaluated some of the promotional strategies that are currently in use.

3) The American Veterinary Medical Association (AVMA) Website

Rationale: We needed to determine the population of pets in a given area in order to understand the community in which Paw Seasons is located. Collecting this information further helped us in the process of designing ideal promotional strategies for Paw Seasons.

4) Various Articles on Promotional Strategies

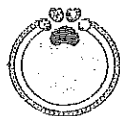
Rationale: These articles provided insight on a plethora of promotional strategies. We were able to learn new trends regarding social, local, and mobile promotional strategies and apply these concepts to Paw Seasons new promotional plan.

5) Social Media Platforms

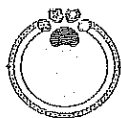
Rationale: By analyzing social media platforms utilized by Paw Seasons, as well as those used by their competitors, our team was able to determine what changes needed to be made. As we analyzed Paw Seasons' current platforms (Instagram, Flickr, Facebook, and Twitter), we took note of what aspects benefited Paw Seasons. Also, with knowledge of Paw Seasons' existing social media platforms, we were able to add, remove, and/or enhance the platforms in order to efficiently reach the business' target market.

B. Process used to conduct the selected research methods

There was a specific process we used to acquire the information needed in order to update Paw Seasons social, local and mobile promotions. The six questions on the following page assisted us in acquiring information to help revise Paw Seasons' promotional plan.



QUESTIONS	RESPONSES
1. <i>What question do you need to answer?</i>	How can Paw Seasons promote their business more effectively by utilizing SoLoMo strategies?
2. <i>What data do you need to collect?</i>	<p>We need to collect:</p> <ul style="list-style-type: none"> 🐾 Company background information 🐾 Information about Paw Seasons' target market 🐾 How customers learned about Paw Seasons 🐾 Current ways Paw Seasons uses social, local and mobile promotions 🐾 Customer/employee opinions and suggestions regarding the company's current local, social and mobile promotions and how they can be improved
3. <i>How will you collect the data?</i>	<ul style="list-style-type: none"> 🐾 Interviews (Ms. Tappan and Mrs. DeLuca) 🐾 Customer surveys 🐾 Census Bureau website 🐾 The American Veterinary Medical Association 🐾 Paw Seasons Website 🐾 Variety of websites and articles about promotional strategies 🐾 Various social media platforms
4. <i>What data have you collected?</i>	The data we have collected has helped us to better understand Paw Seasons' current promotions in the mindsets of both customers and employees. This data will assist us in determining what techniques and strategies to utilize in order to ensure the most effective SoLoMo promotional plan.
5. <i>What actions will you take?</i>	We will evaluate all of the information we collected through primary and secondary research. Based on the analysis of this information, we will develop and propose new ideas and revisions to Paw Seasons current social, local and mobile promotions. We will present our proposal to the Marketing Director, Ms. Tami Tappan at Paw Seasons. Ms. Tappan will then decide if Paw Seasons would like to implement these ideas.
6. <i>How do you evaluate the results?</i>	Only implementing the appended and revised promotional strategies is not sufficient. We must also make sure the strategies are productive in reaching our goal. After approximately six months, we will conduct a second survey to determine our customers' and employees' opinions about Paw Seasons' new promotional strategies. Additionally, we will evaluate changes in revenue, new customers and customer loyalty of Paw Seasons.



IV. FINDINGS AND CONCLUSIONS OF THE STUDY

A. Findings of the research study

A SoLoMo campaign includes three concepts: social, local, and mobile, which work together in order to design an optimal promotional plan. According to *Marketing91*, 82% of business report using secondary data for business intelligence. Therefore, it is crucial for a business to conduct secondary research in order to create an optimal SoLoMo campaign.

The social component of SoLoMo consists of social media which encompasses a variety of Internet applications that allow users to view information and interact with each other by sharing links to interesting information, viewing each other's profiles and posts, and also having the ability to comment on them. This interaction is vital for a business because it allows them to be responsive to customers, view what their customers are interested in, and intrigue their potential customers with information posted. According to *Statista*, 63% of small businesses find Facebook the most effective business to consumer promotion channel by small businesses.

Another necessary element of a SoLoMo promotional plan is the local component. The primary concept of local promotion is geomarketing. Geomarketing is a form of marketing that can target someone based on their location. This helps businesses convey a message to the appropriate target market, at the right time. According to Wesley Young, a columnist for *Local Search Association*, 60% of consumers use their mobile devices to find out information on local products or services and 70% are willing to share their location information if they believe they are receiving something of value from the store in return.

Finally, mobile marketing reaches their target market by creating websites and applications that are compatible with a mobile device, typically a smartphone. According to *Tech in Asia*, world mobile use continues to grow as shown on the infographic to the right. Also,

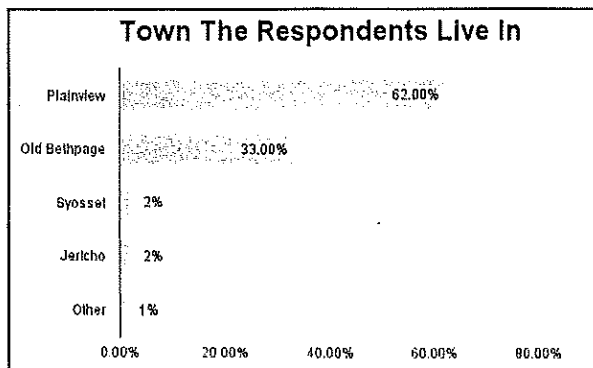


Hubspot states that between December, 2013 and December, 2015, smartphone Internet consumption grew by 78%. In addition, *Clutch* states that 68% of small businesses use a dynamic, mobile friendly website.

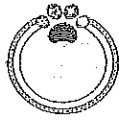
While the secondary research we conducted was very important, another crucial component in developing our plan was primary research. First, we conducted an interview with Paw Seasons' marketing director, Ms. Tami Tappan. This interview provided us with information regarding the business' current promotions. For example, we learned that Paw Seasons only distributes coupons to existing customers. The current strategy does not allow them to expand their customer base to new clients looking for an incentive to go to Paw Seasons for the first time. Also, they host a fundraiser, Paws of Love, where people can both donate and adopt animals. Ms. Tappan admitted that the Paw Seasons' social and mobile media campaigns are not as up to date as they should be.

After the interview and secondary research were conducted, it was also necessary to create and distribute a survey to the current customers of Paw Seasons. This survey was distributed at Paw Seasons and the link was posted on their Facebook during the fall of 2016. The information provided by 52 respondents helped us to design the most effective SoLoMo campaign for Paw Seasons.

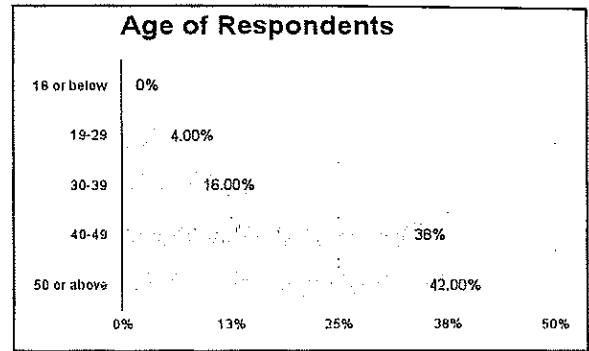
The first aspect we analyzed was Paw Seasons' customer base. As shown on the graph to



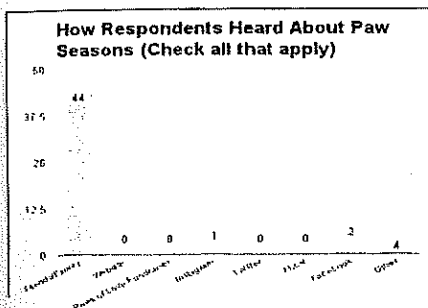
the left, we determined that most of the respondents lived in the Plainview and Old Bethpage area, therefore, Paw Seasons would benefit the most by promoting in those towns.



In addition to the location of respondents, the majority of respondents were over the age of 40, as shown on the graph to the right. Therefore, implementing promotions that target people of that age will benefit Paw Seasons greatly.

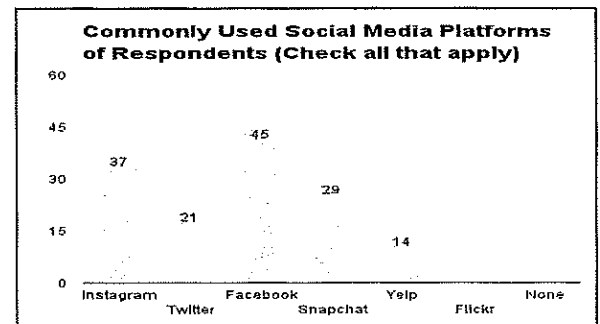


Furthermore, our study has shown us that most of the respondents learned about Paw Seasons through friends and family. This information, shown below, is important because it displays how just three people have heard about Paw

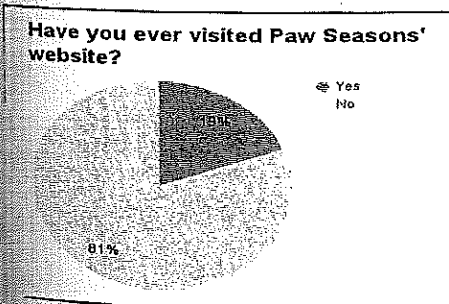


Seasons through social media platforms. Therefore, increasing promotions to customers will help bring awareness about Paw Seasons to more people. Relying on word of mouth is not a suitable way for Paw Seasons to reach customers.

Additionally, the graph to the right helped us to discover that the most commonly used social media platform amongst respondents was Facebook. Therefore, it can be concluded that using Facebook as a source of promotion is vital for Paw Seasons. Also, since Instagram is a close second in the most commonly used social media platforms, Paw



Seasons should take advantage of this and promote through their platform too.



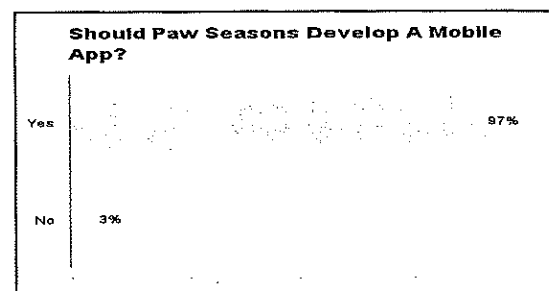
Moreover, the graph to the left, helped us in determining that only 19.2% of respondents have visited Paw Seasons' website. This information is important because it displays how the business



needs to improve their website in order to inform their current customers about the business and obtain potential customers in the future.

In addition, we analyzed if the respondents believed Paw Seasons should partner with a charity. Our survey showed that an overwhelming majority of the respondents (96%) wanted to see Paw Seasons partner with a charity, a suggestion which the business should highly consider in order to improve brand awareness.

Based on the findings to the right, we learned that Paw Seasons should also develop a mobile app. With the growing usage of mobile technology, it is important that Paw Seasons takes advantage of this trend.



B. Conclusions based on the findings

Below are our conclusions based on primary and secondary research regarding Paw Seasons:

Positive Findings	Areas for Improvement	Recommendations
<ul style="list-style-type: none"> 🐾 Target Market: 40+, Plainview 🐾 Loyal customer base 🐾 Well-known business throughout the community 	<ul style="list-style-type: none"> 🐾 No true promotional plan 🐾 Uninformative website 🐾 Unestablished social media brand 	<ul style="list-style-type: none"> 🐾 Revamp the website 🐾 Develop a mobile app 🐾 Enhance social media presence 🐾 Improve local promotions 🐾 Run targeted advertisements 🐾 Partner with a charity

V. PROPOSED STRATEGIC PLAN

A. Objectives and rationale of the proposed strategic plan

A goal is defined as an achievement that is meant to be accomplished within a certain period of time. After conducting thorough research of Paw Seasons, we have developed a variety of short and long-term goals we hope to achieve by implementing a SoLoMo campaign. The short-



term goals for Paw Seasons will take place during a six-month time span, while the long-term goals will take place during a one-year time span. Every six months, we will evaluate the success of the SoLoMo campaign and suggest changes as needed.



- Update logo/slogan
- Update social media accounts
- Implement a geo-marketing campaign with Facebook Sponsored advertisements
- Update website
- Implement livestream
- Develop a mobile app
- Partner with local charity



- Regularly improve the SoLoMo campaign
- Expand clientele
- Stay up-to-date with technology
- Increase customer loyalty
- Increase profits

B. Proposed activities and timelines

In order for Paw Seasons to prosper as a business, they must improve upon their promotional plan. Paw Seasons' current promotional plan needs improvement in order for the business to thrive. The activities proposed on the next page will help to expand clientele, develop customer loyalty, and increase profit.

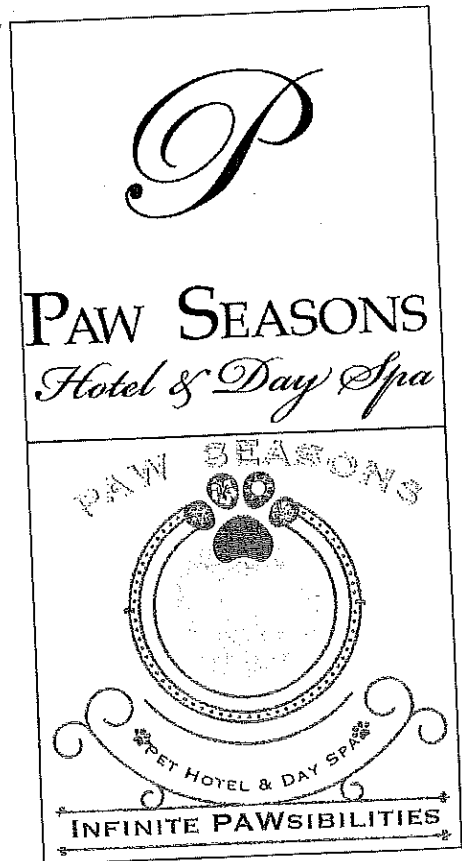


Timeline

April 2017	Present ideas to Paw Seasons
May 2017	New logo and slogan Update social media accounts Establish Facebook sponsored advertisement
June 2017	Update website Implement live stream Release mobile app
July 2017	Introduce social media promotional contests Print advertisement campaign
August 2017	One Paw At a Time Fundraiser
September 2017	Review short term goals
May 2018	Review long term goals

NEW SLOGAN/LOGO: MAY 2017

In order for a customer to have a positive first impression of a brand, both the slogan and logo need to be appealing and innovative. Paw Seasons' current logo, as shown in the upper right picture, is very simple, and does not catch the viewer's eye. Additionally, Paw Seasons lacks a slogan. We feel that it is necessary to create a new logo, as seen in the lower right picture, which is eye catching with a memorable and unique slogan. There is a constant color scheme of yellow and grey. These colors were chosen based on studies of the psychology of marketing that prove that the color grey portrays reliability and professionalism and yellow represents welcoming and cheerful characteristics. These are all characteristics that Paw Seasons





emulates. Additionally, the paw print in the logo has all four seasons of the year inside of it, which gives the logo more detail and relates to the business name. Also, the logo will continue to provide information on what services Paw Seasons offers by saying that it is a “Pet Hotel and Day Spa.” Finally, the new slogan, *Infinite Pawsibilities*, represents the endless love and affection provided by the employees at Paw Seasons to the pet guests during their stay. The staffs ultimate goal is to do anything and everything they can to satisfy their customers. Lastly, it also represents that Paw Seasons is committed to continuing a SoLoMo campaign.

SOCIAL MEDIA: MAY 2017

Social media offers businesses a valuable way to talk, connect, and learn credible information about their customers. It is a rapidly growing means of communication, and according to *Emarketer.com*, one in four people actively use social media. Paw Seasons will benefit from social media as their name will become more popular, and since having a social media page is typically free, it is an inexpensive yet efficient way of promotion. The SoLoMo campaign we hope to implement includes three specific social media platforms: Facebook, Instagram, and Twitter. By using each of these platforms we hope to increase brand awareness of Paw Seasons.

Instagram and Twitter

Instagram and Twitter are very effective social media platforms for promotion. According to *Hootsuite*, Instagram is used by 48.8% of brands, a number that is expected to rise to 70.7% by 2017. Instagram and Twitter are both trending platforms and Paw Seasons needs to use them to their advantage. We feel that by actively posting photos, videos and promotional contests, Paw Seasons will create a direct outlet to new and existing customers. Also, responding to customers via social media is crucial in creating positive business to consumer relationships.

when their tweet has been replied to. Not all businesses respond to their customers, so this easy task will put Paw Seasons above their competition.

Facebook

Paw Seasons' first and primary social media platform will be Facebook, as it is the most efficient platform for businesses and reaches Paw Seasons' target market effectively. According to *Sprout Social*, the average American spends 40 minutes a day on Facebook. Paw Seasons will utilize Facebook in a multitude of ways explained below.

1. Facebook Posts

In order to be active on Facebook, Paw Seasons should post photos and videos of the pets utilizing and enjoying the facilities, as well as videos of the friendly and loving staff interacting with the pets. These photos and videos will depict how much the pets enjoy Paw Seasons, which will then create a positive image for the business. Additionally, Paw Seasons should encourage their loyal customers to share the business' posts, so that their friends can view them as well. In order to fully take advantage of Facebook, Paw Seasons should respond to all customers' comments and private messages within 24 hours to show that they care about what their customers have to say. In turn, this will create a good relationship with customers and aid in developing customer loyalty.

2. Facebook Live

Through Facebook, Paw Seasons can also utilize Facebook Live, a trending feature that will allow the business to post videos of specific rooms, so customers can see exactly what their pets are doing and potential customers can understand what services Paw Seasons provides. Additionally, Paw Seasons should use Facebook Live to give viewers a full tour of the facility,



so existing and potential customers can see where their pet is staying while they are away. They should use Facebook Live to showcase special events, such as the existing *Paws of Love* fundraiser, so customers who could not attend could still view the event. Showing events on Facebook Live will interest people who did not attend this year, to attend the event the following year.

3. Facebook Geo-Targeted Advertisements

Paw Seasons should also invest in geo-targeting sponsored advertisements on Facebook. Using Facebook's geo-targeting feature, Paw Seasons should focus their advertisements on people living in Plainview and within the surrounding area, people between the ages of 40 and 55, and people who own pets. The sponsored advertisement should include Paw Seasons' contact information along with the business' logo, social media handles and website link. The sponsored advertisement will promote Paw Seasons to potential customers in their target market in order to expand the business' customer base. To measure the amount of views per advertisement, Paw Seasons can monitor the cost per a thousand impressions (CPM). Additionally, Paw Seasons can track the cost per one click (CPC). Therefore, Paw Seasons will be able to measure the success of their Facebook Geo-Targeting Advertisements.

REVAMPED WEBSITE: JUNE 2017

A simple and successful way to attract customers to a business is by having an exciting and attractive website. A website with a variety of information regarding the business, vivid graphics, as well as photos and videos will attract viewers. According to *HubSpot*, 38% of people will stop engaging with a website if the content/layout is unattractive. Therefore, it would be beneficial for Paw Seasons to create a new website design that is more appealing. As of the fall 2016, Paw Seasons lacks a website that provides sufficient information about their business and



services offered. Their website should be more organized, as shown in the picture below, and include tabs for different information, and maintain a color scheme of yellow and grey.

Additionally, the website should be compatible with a mobile device. If people are able to access the website in its entirety through their mobile devices, they are more likely to view the website and utilize the business' services. Furthermore, the website should include a *My Account* system which would allow for personalized accounts for each customer. Customers with an account will be able to log-in to the website to view their recent transactions at Paw Seasons, view recent photos of their pet and book stays and grooming services.



MOBILE APP: JUNE 2017

With the use of technology growing and mobile apps on the rise, it is recommended for a business to implement an app. An informative and innovative app can differentiate a business from their competition. We feel that creating an app can help Paw Seasons stay up to date with trends and also, rise above their competition. Customers who download the free Paw Seasons app and show the receptionist at the front desk the app on their phone will receive a free Paw Seasons frisbee. An image of the potential app home page is shown to the right and a description of the app we believe Paw Seasons should create is displayed on the following page.





App Page	Features
Appointments	<ul style="list-style-type: none"> 🐾 Customers can book appointments on the app, which it notifies the business when an appointment has been booked 🐾 Displays schedule of customers past and upcoming appointments 🐾 Customers can pay for appointments on the mobile app
Pawparazzi	<ul style="list-style-type: none"> 🐾 Photos and videos of the pets can be seen through this page
Pawstream	<ul style="list-style-type: none"> 🐾 A live stream of pets in the main play room will be shown 24/7 🐾 Customers can comment on the Live Stream and also view other customer's comments
About Us	<ul style="list-style-type: none"> 🐾 Paw Seasons' contact information (email and phone number) 🐾 Link to the website 🐾 Hours of operation 🐾 Address of Paw Seasons 🐾 Directions to the facility via Google Maps 🐾 Photo of the outside of the facility so new customers can easily recognize it
Social Media	<ul style="list-style-type: none"> 🐾 Direct links to Paw Seasons' Instagram, Twitter, and Facebook pages
P.S. Loyalty Card	<ul style="list-style-type: none"> 🐾 Collect 10 stamps to unlock a free grooming service
Customer Feedback	<ul style="list-style-type: none"> 🐾 Customers can view other customers' reviews
Upcoming Events	<ul style="list-style-type: none"> 🐾 This page provides customers with the dates and descriptions of upcoming events that Paw Seasons is hosting
Tell A Friend	<ul style="list-style-type: none"> 🐾 A share button is displayed on this page, which serves as a way for friends to share this business and its app 🐾 Customers can share the business via messages, email, notes, and a variety of social media platforms
Notifications	<p>Notifications will be sent to customers when:</p> <ul style="list-style-type: none"> 🐾 Their pet is groomed, fed, sleeping, and playing outside. 🐾 A photo of their pet has been posted 🐾 New promotions are available

This app will be created on *Business Apps*, a mobile app maker that helps small business clients increase revenue and customer retention. This platform is inexpensive, easy to use, and customers will be able to download this app from the Apple Store and Google Play.



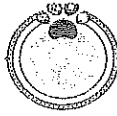
LIVE STREAM: JUNE 2017

Paw Seasons should increase their customer's satisfaction by implementing a live stream. The business should embed a live stream 24 hours a day, 7 days a week of their main dog playroom on their website. The live stream will show pets interacting with the friendly and caring staff, as well as playing with other pets. This will allow customers to feel more relaxed, knowing that their pets are safe and enjoying their stay. We plan on using *Dacast.com*, a free online streaming service, and using our own camera. Customers will be able to view the live stream through a direct link on the Paw Seasons website, as well as on the Paw Seasons app. Additionally, customers will need to log into their account in order to view the live stream. This live stream differentiates from the Facebook Live feature as Facebook Live has a four-hour limitation.

SOCIAL MEDIA CONTESTS: JULY 2017

Paw Seasons needs to spread awareness about their business in an exciting and creative way. To do this, Paw Seasons should hold seasonal contests on their social media platforms. To spread awareness about these contests, they should distribute flyers to current customers as they leave the facility and post contest information on their revamped website and throughout their enhanced social media platforms. These contests will promote traffic to their very own social media platforms. During these proposed contests, contestants will take a picture of their dog relating to the chosen theme depending on the season, and upload it to their own Instagram, Twitter, or Facebook page with the hashtag #EverySeasonIsPawSeason.





Contestants must also tag the Paw Seasons account on the appropriate platform so that Paw Seasons is able to view every submission. Then, Paw Seasons will repost the photo, and the contestant with the highest number of likes will win a prize. The winner will be announced on all of Paw Seasons' social media platforms and receive complimentary grooming at their next visit.

The proposed contest described above will not only spark excitement for Paw Seasons, but spread awareness about the business by driving current and potential customers to Paw Seasons' social media pages. Sponsored advertisements on social media could further promote the contests as well. These contests will be themed seasonally, as shown in the graphic on the right.



COUPONS: JULY 2017

In July 2017, Paw Seasons should release their first print advertisement, which should incorporate the updated company logo and their social media platforms, a coupon. The advertisement should be issued in both the Plainview-Old Bethpage/Jericho and Syosset-Woodbury *Pennysaver's* once every two months. These editions have been chosen because they are where a majority of the business' customers are located. This coupon will attract current and potential customers to



Paw Seasons and serve to increase brand recognition among residents in these areas. An example of the print advertisement that should be implemented is shown above.



ONE PAW AT A TIME FUNDRAISER: AUGUST 2017

A very effective way to reach out to the community is by hosting a local charitable event. According to *Nonprofit Hub*, 90% of American consumers want to know about what causes companies are supporting, therefore, partnering with a charity will better Paw Seasons' image and encourage customers to interact with the business to help the cause.

We believe that Paw Seasons should partner with Little Shelter Animal Rescue and Adoption Center, a nonprofit, no-kill animal shelter located in Huntington, New York. Paw

ONE PAW AT A TIME DOG WALK
SATURDAY
AUGUST 26, 2017
NATIONAL DOG DAY

FOR QUESTIONS AND MORE INFORMATION VISIT
WWW.PAWSEASONSCHATEL.COM
CALL (516) 942-9357
OR
EMAIL: INFO@PAWSEASONS.COM

SUGGESTED DONATION
OF DOG FOOD/SUPPLIES
TO BENEFIT
LITTLE SHELTER
ANIMAL RESCUE &
ADOPTION CENTER

DOG TREATS,
SNACK BAGS
&
WATER BOTTLES
WILL BE PROVIDED

START IS AT
BETHPAGE BIKEPATH

Little Shelter
animal rescue & adoption center

INFINITE PAWSIBILITIES

Seasons should team up with this charity and host a local dog walk entitled, One Paw At A Time. This walk should take place on August 26, National Dog Day, at the Bethpage Bikeway Trails, located about three minutes away from Paw Seasons.

Customers who participate will be asked to donate \$5, as well as a can of dog or cat food to benefit Little Shelter. Here, participants will leisurely walk along the trails with their pet, enjoy the beautiful of nature, and support Little Shelter Animal Rescue and Adoption Center. In addition, Paw Seasons will supply water bottles, mini snack bags, and dog treats. To raise

awareness about this event Paw Seasons can post information on their social media and can use the hashtag, #OnePawAtATime. This hashtag will spread awareness about this charitable event as well as create excitement about the business. A Facebook Live video will also be streamed at the event in order to increase attention and interest people who could not attend this event. Not only will this event support a charity, it will also promote Paw Seasons, as people in the town will see the event occurring through their daily travels. This will be a nice culmination to the

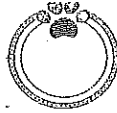


initial portion of the promotional plan, as Paw Seasons can utilize personal selling at the event to promote the new app, updated website, social media and livestream.

C. Proposed metrics or key performance indicators to measure plan effectiveness

It is essential to measure the progress of a promotional campaign, in order to determine its success. After evaluating each activity, it can be concluded which aspects are successful and which are unsuccessful. In order to fully analyze the success of each activity, a variety of evaluations would need to be completed. Methods for evaluation after 6 months and one year can be seen below.

Activity	Measurement
<p>New Slogan/Logo</p>	<ul style="list-style-type: none"> 🐾 Post survey responses 🐾 Customers will be provided with surveys after the new logo and slogan have been implemented throughout the business. From these responses, the customer satisfaction level with the new slogan and logo can be determined.
<p>Social Media Updates</p>	<ul style="list-style-type: none"> 🐾 Replies, comments, number of likes, and amplification rate <ul style="list-style-type: none"> ○ Instagram: 300 followers in 6 months, 5 regrams/post, 40 likes/post, 5 comments/post ○ Twitter: 300 followers in 6 months, 5 RTs/tweet, 20 likes/tweet, 5 replies/tweet ○ Facebook: 1000 Likes in 6 months, 20 shares/post 🐾 More likes on a post and a higher amplification rate represents customers' satisfaction with the image posted 🐾 Comments indicate customer's likes/dislikes
<p>Facebook Live</p>	<ul style="list-style-type: none"> 🐾 Views, customer's reactions, and comments 🐾 Customers' reactions show how customers felt about the live stream. 🐾 Facebook shows who views the live stream. Therefore, Paw Seasons will be able to see if they are reaching their target market. 🐾 Facebook directly shows when people view the live stream, so this information could be used in the future to stream at the most popular time. 🐾 At least 75 views on each live stream.
<p>Facebook Sponsored Advertisement/ Geotargeting</p>	<ul style="list-style-type: none"> 🐾 Facebook Analytics 🐾 Through Facebook Analytics, the name and location of each person who looks at the advertisement is provided. Therefore, if those people become customers, it can be determined how successful the advertisement was.



<p>Revamped Website</p>	<ul style="list-style-type: none"> 🐾 Post-survey responses and website analytics 🐾 Customers will be provided with surveys after the website has been revamped. From these responses, the customer satisfaction level with the new website can be determined. 🐾 Use <i>similarweb.com</i> to view the total amount of visits the new website received. This website calculates how many people visit the website with the click of a button and is very simple for any user. 🐾 Monitor amount of accounts and usage of each account <ul style="list-style-type: none"> ○ Goal: 100 accounts setup
<p>Livestream</p>	<ul style="list-style-type: none"> 🐾 Amount of views and comments 🐾 The Livestream will show how many views it has received. 🐾 Comments indicate customer's feedback about the Livestream.
<p>Mobile App</p>	<ul style="list-style-type: none"> 🐾 Number of downloads 🐾 App Store 🐾 Monitor reviews and ratings of app on App Store and Google Play store 🐾 Bizness Apps Analytics 🐾 See the amount of people that downloaded app 🐾 Shows the amount of times app is opened 🐾 Shows the amount of times each screen is opened
<p>Social Media Contests</p>	<ul style="list-style-type: none"> 🐾 Amount of people who entered the contest 🐾 Calculate the number of people who posted the contest on their own social media account, to measure the effectiveness of the promotion.
<p>Coupons</p>	<ul style="list-style-type: none"> 🐾 Amount of people who use the coupon 🐾 Calculating the number of coupons used will determine how successful the promotion was
<p><i>One Paw At A Time</i></p>	<ul style="list-style-type: none"> 🐾 The number of people who attend, amount of donations, and feedback after the event 🐾 Reviews on social media platforms will represent customer's feedback on the event 🐾 At least 50 people attending this event 🐾 Goal: Raise \$300 for Little Shelter and donate 100 pet food cans

Along with the evaluation methods described above, Paw Seasons should use the return on investment formula below to calculate the quantitative success of their SoLoMo campaign.



$$\text{ROI} = \frac{\text{Gain from investment} - \text{Cost of investment}}{\text{Cost of Investment}}$$

This formula will provide Paw Seasons with a percentage that would allow them to distinguish their return on investment, or gain after implementing their SoLoMo campaign. If the formula produces a 25% ROI, the SoLoMo campaign can be considered successful.

VI. PROPOSED BUDGET

In order to implement the proposed SoLoMo campaign, it is necessary to review the expenses and confirm that the budget is maintainable for Paw Seasons. The approximate budget for the first six months of the SoLoMo campaign is displayed below and on the following page.

<u>Activity</u>	<u>Unit(s)</u>	<u>Cost/Unit</u>	<u>Total Cost</u>
New Logo/Slogan	1 Logo/Slogan	\$0.00/Logo/Slogan	\$0.00
Update Social Media Accounts	3 Accounts	\$0.00/Account	\$0.00
Update Website	1 Website	\$0.00/Website	\$0.00
<u>Facebook Sponsored Advertisement</u>	<u>Unit(s)</u>	<u>Cost/unit</u>	<u>Total Cost</u>
(CPM) Views of Ad	1000 Views	\$.01335/View	\$13.35
(CPC) Clicks on Ad	60 Clicks	\$1.01/Click	\$60.06
Total Facebook Sponsored Advertisement Expense = \$73.41			
<u>Mobile App</u>	<u>Unit(s)</u>	<u>Cost/unit</u>	<u>Total Cost</u>
Hire Part-Time Worker	10 Hours	\$15.00/Hour	\$150.00
Mobile App Subscription	6 Months	\$42.00/Month	\$252.00
iOS Store License	Yearly Cost	\$99.00/Year	\$99.00
Google Play Store License	One Time Fee	\$25.00	\$25.00
Frisbee Giveaway	100 Frisbees	\$2.30/Frisbee	\$230.00
Total Mobile App Expense = \$756.00			



<u>Live Stream</u>	Unit(s)	Cost/unit	Total Cost
Live Stream Subscription	6 Months	\$19.00/Month	\$114.00
Live Stream Camera- VIXIA HF R700	1 Camera	\$199.99/Camera	\$199.99
Total Livestream Expense = \$313.99			
<u>Contests</u>	Unit(s)	Cost/unit	Total Cost
July 4th Summer Contest Prizes	2 Services	\$40.00/Service	\$80.00
Total Contests Expense = \$80.00			
<u>One Paw At a Time Fundraiser</u>	Unit(s)	Cost/unit	Total Cost
Small Water Bottles (48 bottles/case)	6 Cases	\$5.88/Case	\$35.28
Mini Snack Bags (60 Packs/Box)	3 Boxes	\$10.79/Box	\$32.37
Dog Treats (24/box)	3 Boxes	\$29.24/Box	\$87.72
Total One Paw At a Time Fundraiser Expense = \$155.37			
<u>Pennysaver Print Advertisements</u>	Unit(s)	Cost/unit	Total Cost
Plainview, Old Bethpage, Jericho Edition	3 Advertisements	\$115/Ad	\$345.00
Syosset, Woodbury Edition	3 Advertisements	\$115/Ad	\$345.00
Pennysaver Print Advertisements Expense = \$690.00			
TOTAL EXPENSES = \$2,068.77			

Many components of the budget will not incur any cost. Since Paw Seasons already has a marketing manager, she will enhance the logo, social media, and website that already exists. Therefore, there will not be an additional expense for these activities. Since Paw Seasons already has a website, paying for the domain name and host site will not incur additional charges. We think that Paw Seasons should hire a part time employee to help develop the app.

After thorough research, it was determined that the Facebook Sponsored Advertisements will cost \$.01335 per view and \$1.01 per click. Paw Seasons should set a limit of 60 clicks,



totaling \$60.06 and 1,000 views totaling \$13.35. However, if these become lucrative forms of social promotion the budget for these items can be increased.

Additionally, within the six-month time span of the budget, Paw Seasons will host one large scale social media contest. Therefore, the only cost for the “Contests” activity is the July contest shown above.



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