



DAVID L. SPENCER

PROFESSIONAL SAMPLES

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WRITING

7 Ways to Cultivate a Team of Owners

Creating the right conditions to organically grow employee investment, proactivity and ownership

One of the most important things I've learned in leadership is a relatively simple truth: employees that are emotionally invested in and connected to the business are incredibly valuable, and vital to its success. In our broader team culture, we call those people "owners". As in, they feel an emotional ownership over their work, their peers, our clients, and our business at large. Sometimes, we contrast these people with their not-so-invested counterparts – "renters."

Owners are more likely to proactively identify opportunity, solve problems, bridge gaps, and find new and better ways to execute on our business goals. They care about the needs of our clients/customers, thinking about how we can drive more value and how they can directly impact that value. They are company stewards and good corporate citizens, even off the clock. They are ambitious, and they feel pride of ownership in the work they do. The best part? They enjoy it. They are happier, and feel more career contentment (from my observations and conversations).

But you can't just ask employees (even very good employees) to be owners. It doesn't work that way. True ownership is much more intrinsic. At least the kind that endures.

So how can we help people along this path? The answer is easy to aspire to but difficult to deliver on: we can try to create the right conditions to incubate proactivity, investment, and ownership, and then let it develop organically among a group of good people. Doing so can help facilitate a culture where people are more likely to be invested in what they do, proactively leverage their skills and talents, and obtain job satisfaction.

Starting with the assumption that we have the right people in the right seats, here are seven ideas that can help create a culture of owners:

1. **Define and Articulate Meaning** – Job satisfaction is difficult to obtain without a sense of meaning or significance. It's important for all of us to understand how our work and efforts can positively impact something larger than ourselves. What that something is can vary. It can be the success or well-being of a team/division/company, a set of clients or customers supported, or a community. It can be the opportunity to carve out a new process/solution/product or to overcome a difficult obstacle. It can be several of those things. If employees understand how their contributions positively impact the greater good, they can achieve more meaning in their work and have a greater investment in the outcome.
2. **Carve Out Attribution** – How do we know that our efforts helped contribute to a successful outcome, or failed to do so? Sometimes it's a very direct correlation, but other times it can be more obscure, especially if the process is very interdependent among many people or variables. It's important to try to lock in on what an employee can affect, and then close the loop by following back up with them on the outcome. The more that we can stamp our identity on an outcome, the more valuable (and valued) we feel.

About Project: I have experience writing editorial-style articles and content. This is an excerpt from a personal piece posted to LinkedIn that conveys some of the important lessons I have learned during my time in leadership.

7 Ways to Cultivate a Team of Owners

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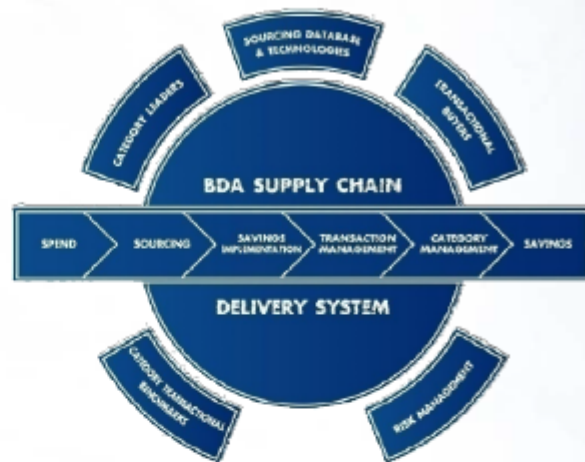
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3. **Trust and Empower** – To do their best work and to grow and evolve, talented people need space to operate. Train them and give good strategic direction, define their playing field and where the boundaries are, and then let people get after it. Empower them to independently make decisions and to take actions wherever possible. Encourage ideation and risk-taking. Forgive honest mistakes and let the employee help identify and execute the solution. Having autonomy and the trust of your co-workers and leadership is empowering. It also puts the onus on each of us to be alert, engaged and proactive instead of waiting for someone else to give us direction.

WRITING

About Project: I strategized and wrote more than a dozen proposals for the promotional products firm Bensusen Deutsch & Associates (BDA) in its efforts to win new business and retain existing business. Most were approximately 80-100 pages and were in response to complex RFPs from Fortune 100 businesses and major sports leagues. In total, I helped win more than \$25MM in revenue.

Supply Chain Management: A 'Spend to Save' Structure

BDA understands that intelligent and strategic procurement is critical to a company's performance and bottom line profitability. To meet this need, BDA utilizes industry-best supply chain management practices that optimize cost savings opportunities and drive year-after-year savings. Powered by a dialed set of processes and unrivaled industry expertise, BDA's supply chain management can create visibility to A-B's entire merchandise spend, and leverage this spend to gain economies of scale and drive cost savings. As an all-encompassing merchandise partner, BDA will provide complete support and expertise at every stage of the procurement process, including:



- **Sourcing** – BDA's sourcing experts are category specialists that leverage market insight into additional cost savings. Utilizing qualified, certified, and compliant sources, BDA leverages its spend volume and componentized supply chain to drive out additional markups.
- **Savings Implementation** – BDA will implement cost savings strategies that can be applied to supply chain management processes in order to gain efficiencies in design, production, and delivery. BDA's supply chain specialists utilize automated processes and work with suppliers to realize target savings.
- **Transaction Management** – BDA's skilled team of purchasing professionals actively manages processes, infrastructure, and day-to-day project transactions in order to optimize the supply chain and simplify the buying experience of the user.
- **Category Management** – Armed with purchasing metrics and an intricate knowledge of marketplace trends, BDA's category experts continually monitor purchasing and then execute solutions that improve performance, corral rogue spend, and drive program compliance.

Ultimately, BDA's procurement expertise will bring value to A-B by driving hard-dollar cost savings to its bottom line. As a full-circle supply chain expert, BDA will generate quantifiable cost savings through strategic supply chain optimization, and continue to seek out and capitalize on cost improvement opportunities as dictated by marketplace conditions. A-B can be confident knowing BDA's supply chain will facilitate maximized cost savings, ensure quality and safe product, and deliver merchandise on time. This is what we call our Perfect Order Rate.

About Project: I have written many press releases, including a series for El Taller Latino Americano in NYC. All press releases in this series were crafted by reading transcripts from interviews with the respective artists.



PRESS RELEASE

FOR IMMEDIATE RELEASE

Contact: Veronica Aberham
veronica@tallerlatino.org
Ph: 212.665.9460

Exhibit of Mexican Artist Combines Passions for Music and Painting

(March 3rd, 2008) El Taller Latino Americano presents “Murals, Music, and Masks of Mexico”, an exhibition of work by Alberto Villalobos, a talented painter and musician from Veracruz, Mexico. Villalobos will present a series of hand-painted masks and murals with a focus on celebrating the culture of Mexico, specifically Veracruz. The exhibit, which runs from March 8th – April 15th, 2008 will also feature select musical performances by Villalobos and his brothers.

Drawing from a multifaceted background infused with both formal education and grass roots cultural exposure, Alberto Villalobos’ work is as distinctive and intricate as his own life. The colorful masks in his collection are representative of such diverse topics as politics, culture, and nature, yet come together to form an inclusive body of work. The murals depict a trio of musicians from Huasteca, a region of Veracruz.

The bulk of Villalobos’ work has roots in his Mexican heritage. “I’m trying to stress the color and joy of Mexican tradition,” says Villalobos, noting this as a reason for utilizing pure, bright colors. Many of Villalobos’ paintings draw inspiration from the “fandangos” played by musicians in Veracruz, to which residents dance and drink. “So this colorful background is just that: a party, a fandango,” Villalobos explains, describing one of his murals.

Some of his work, though, carries a more serious undertone. One of the featured masks, titled *Marcos*, is a tribute to the man of the same name who leads the political movement of the Zapatistas in Mexico. “I admire his determination,” says Villalobos, “he is a living legend in Mexico.”

Villalobos is also an accomplished musician and, together with his brothers, plans to perform a special concert at both the opening and closing of the show. “It will be a beautiful gift for everybody who attends the exhibition,” he says.

El Taller Latino Americano is a non-profit arts and education organization that seeks to bridge the distance between Latin Americans and North Americans through the language of art and the art of language. El Taller also offers conversation-focused Spanish classes.

“Alberto Villalobos – Music, Murals, and Masks of Mexico” runs from March 8th – April 15th, 2008 at El Taller Latino Americano, 2710 Broadway / W. 104th Street in NYC or visit www.tallerlatino.org.

WRITING

***About Project:** This web copy was written for a local chamber of commerce touting the benefits of relocating to Southeastern Washington. I have extensive experience writing web copy in tones that match the respective brand and audience.*

About the Region

Tri-Cities

Located in southeastern Washington, the Tri-Cities is a family-friendly region that has drawn national attention in recent years for its strong economy, low cost of living and quality of life offered. The region is comprised of four cities – Kennewick, Richland, West Richland, and Pasco. With a combined city population of about 220,000 and a metro population topping 260,000, the Tri-Cities is the fourth largest metropolitan area in the state.

Located in a semi-arid climate with mild winters and more than 300 days of sunshine each year, the Tri-Cities offers many opportunities for outdoor recreation. Its location at the confluence of three major rivers makes it an ideal venue for watersports and fishing. Golf is also a popular activity among local residents, with the region being home to at least 10 golf courses. The region also features dozens of wineries and many wine tasting tours and wine-related festivals. For sports enthusiasts, three minor league professional sports teams (baseball, hockey, arena football) call the Tri-Cities home.

The Tri-Cities area is well known for its robust school system and post-secondary opportunities. In addition to eight public high schools, the area also offers a technical skills center, community college, and a four-year branch campus of Washington State University. A recent U.S. News and World Report survey placed three local high schools among the top in the state.

The region's diversified economy has remained strong over the last decade, leading to national recognition. In 2010, Kiplinger recognized Kennewick as one of the Top 10 places to raise a family, citing the strong economy, low cost of living and abundance of outdoor activities. Also in 2010, CNN/Money listed the region as one of the top 10 best bets for gains in housing value.

Yakima

Located in south-central Washington, the city of Yakima attracts those who enjoy an arid climate and relaxing lifestyle alongside the benefits of city living. Yakima has a population of approximately 91,000, making it the eighth-most populated city in the state. The metro population within a 20-mile radius of the city tops 125,000.

Situated in the Yakima Valley, Yakima is known for having four distinct seasons and an abundance of clear, sunny days throughout the year. With a climate and soil conducive to growing grapes, Yakima has emerged as a destination spot for wine-lovers, and features over 50 local wineries and many wine-related festivals. In addition to providing the grapes for over half of the wine produced in the state of Washington, the Yakima Valley also produces about 75% of the hops grown in the United States each year.

The Yakima River flows alongside the city, providing plenty of fishing and recreational opportunities. Also featured along the river are a wildlife sanctuary, several parks and a beautiful 10-mile trail conducive to walking, jogging, bird watching, and cycling. Many small lakes dot the area north of the city, providing additional fishing and swimming spots during the summer months.

In addition to abundant recreation, Yakima residents can enjoy big-city amenities including a world-class symphony, a beautiful theater that hosts touring Broadway musicals, local theater performances, and a downtown area that offers residents and visitors a variety of shopping and dining pleasures.

Post-secondary education opportunities include one of the oldest community colleges in the state, Yakima Valley Community College, and a recently established medical school that graduated its first class of osteopathic physicians in 2012.

POWERPOINT PRESENTATIONS



POWERPOINT PRESENTATIONS

About Project: I believe that effective communication must speak to the target audience on its terms, in language that resonates with the audience. This excerpt from a furniture store pitch is a good example of how this approach establishes mutual trust.

Key Insights For Your Business

Every business we work with has unique goals, unique challenges, and unique definitions of success. We take this fact to heart when researching and building out solutions for our clients. Our solutions are based on data-driven decisions at every step of the process.



Your Audience



HHI \$100K+



Any Family Makeup



Women



Home Owners



Ages 35+



The Furniture Buying Flow

As a veteran in the furniture game, you know that the furniture industry has a flow, and it's smart to prepare for the flow of the industry. Beyond that, it's important to structure your messaging to align with the time of the year, and the focus of your goals, and the age of your business.

% OF ANNUAL SALES



TRENDS

- There is a natural lull in the winter months, which is likely more extreme in cooler climates.
- The best time of year for sales is just before the seasonal lull
- March hits big, possibly due to tax returns pumping a sudden influx of cash into the industry, and spring energy of "renewal" with spring cleaning.

POWERPOINT PRESENTATIONS

About Project: I have created hundreds of PPT presentations in the past 5 years, and am experienced at conveying important information in an easy-to-digest format. This presentation was created to pitch advertising solutions to a Ford dealership in Montana. I started with spreadsheets of POLK data and pulled out key storylines.

Performance of Key Models – DMA

YTD through August

Make	DMA UNIT SALES			DMA MODEL SHARE*			Share Trend
	2018	2019	2020	2018	2019	2019	
F-Series	205	177	199	41.2%	40.6%	47.0%	↑
Ranger	0	14	32	0%	32.6%	36.8%	↑
Explorer	33	23	27	38.8%	45.1%	39.1%	↓

* % of all New Model sold in the Missoula DMA



F-Series **(+22 Units)** and Ranger **(+18 Units)** truck sales drove the bulk of YOY unit growth.

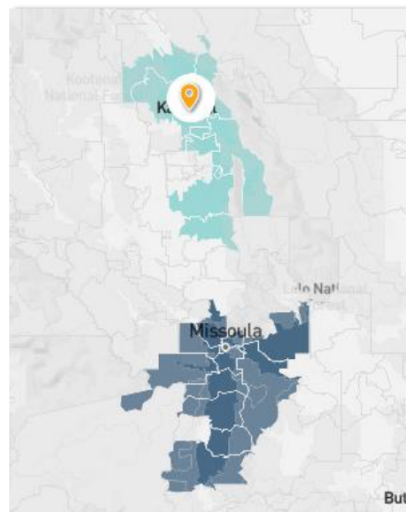


Explorer **(-6% Share)** and Expedition **(-9% Share)** both lost ground in the DMA.

Source: IHS Markit Polk data, Kalispell Ford/K

Sales Distribution by Linear TV Zone

% of Kalispell Ford sales by geographic distribution, YTD through August



78% | Kalispell Zone

2% | Missoula Zone

80% of sales fall within the Missoula DMA

20% of sales fall outside a Linear TV Zone



With **78%** of Kalispell Ford sales falling into the Kalispell zone, linear cable TV advertising in this zone is an extremely efficient way to reach your most likely **Ford buyers**.

Source: IHS Markit Polk data, Kalispell Ford/Kalispell Toyota/Kalispell VW, YTD 2020 v 2019, Pulled Sept 2020

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Back to Home

POWERPOINT PRESENTATIONS

About Project: Every effective piece of communication begins with understanding the target audience for the message and the goal of the communication. PPTs are most effective when they keep these two things tightly in scope throughout. This is an example of the effectiveness of the “problem/solution” format, reframed as goal/plan.



GOAL

Reach prospective residential buyers/sellers in Walla Walla

PLAN

- Use targeted Cable TV advertising to create brand awareness efficiently while driving search/website visits.

Geography: Walla Walla Zone

Demo: Married Adults 25-54, HHI 50K+

Top Networks Delivered (by estimated impressions):   

- Layer in online display advertising to zero in on your best prospects (targets behaviors and interests).

Geography: Walla Walla Zone

Demo: Married Adults 25-54, HHI 50K+

Contextual Interests: Real Estate Listings, Home Financing, Home & Garden

Ad Placement: Local Media (keprtv.com, nbcrightnow.com etc), Real Estate (Zillow.com, realtor.com etc),

Home & Garden (wayfair.com, HGTV.com, etc), and more

19,445

TV ad Impressions/mo. (est)

31,150

Display Impressions/mo.

\$1000

Monthly investment

Spectrum
REACH



GOAL

Reach affluent prospective buyers of farms/farmland

PLAN

- Use targeted online display advertising to zero in on your best prospects (targets behaviors and interests).

Geography: Walla Walla and surrounding rural areas (can zero in at the zip level)

Demo: A35+, HHI 100K+

Contextual Interests: Investment Real Estate, Real Estate Listings, Agricultural Equipment, Crops & Seed, Food Production, Livestock

Ad Placement: Local Media (union-bulletin.com, keprtv.com etc), Agriculture & Forestry (almanac.com, agweb.com etc), Agricultural Equipment

(mytractorforum.com etc), Real Estate (Zillow.com, realtor.com etc), +capitalpress.com, wheatlife.com, and more.

- Layer in addressable household targeting while broadening net (targets specific households).

Geography: Broader geography can include Tri-Cities, Yakima, or whatever radius it is believed would find interest

Farming Households: Occupation: *Farmer*, Property Size: *10+ Acres* (can go larger or smaller)

Investor Households: Net Worth: *1MM+*, Investment Resources: *500K+* (can adjust up or down)

135,417

Display Impressions/mo.

\$1250

Monthly investment

Spectrum
REACH



POWERPOINT PRESENTATIONS

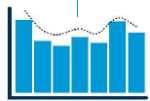
About Project: This presentation is a great example of my ability to first derive strategy and then distill it into a shareable form. I initially poured through data to identify these four positive correlating factors for higher account retention (using linear regression), and then turned it into a concise story with takeaways for sellers.

We Followed the Data



Data is changing the way advertisers reach their customers.

With a treasure trove of viewership and media consumption data, we are building more precise, informed and effective audience-driven campaigns than ever before.



Data is also helping us identify trends across successful campaigns...

Our data team analyzed thousands of advertising campaigns spanning three years, and looked for correlations between the makeup of a campaign and the long-term success of our clients. The positive indicators became part of our *Successful Client Anatomy*.



...and then replicate that success with more and more advertisers.

Now, we're on a mission to ensure that our best clients are positioned for long-term success by ensuring healthy, robust campaigns that integrate the success indicators we found.

Our analysis revealed there are **four key indicators** that drive successful campaigns...



The **Four** Key Indicators

Effective Annual Spend



Advertisers with budgets that sufficiently drive effective reach and frequency (based on target audience and geography) are more successful than those that overly-dilute their spend.



Consistent Exposure

Campaigns with ads running in most or all months within a calendar year drive greater long-term client success than those with more sporadic flight dates, regardless of business seasonality.

Broad mix of Networks & Dayparts



Linear campaigns with a broad, healthy mix of networks and dayparts perform better than those that are narrower in scope (i.e. primetime only).



Messaging Across Multiple Screens

Advertisers that run ads across multiple Spectrum Reach platforms (linear cable plus online products including display or video) are more successful than those that run linear-only or digital-only campaigns.

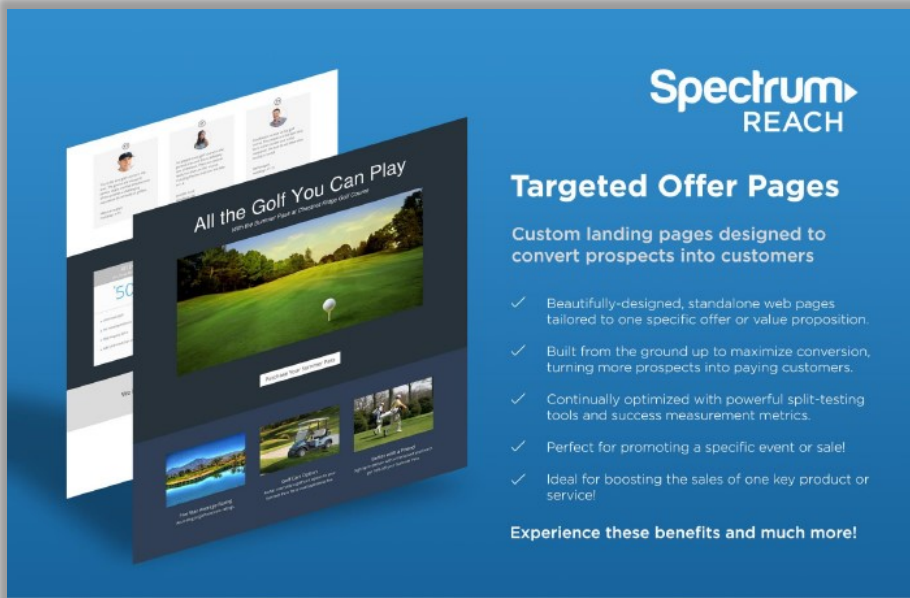


SALES SHEETS & COLLATERAL



SALES SHEETS/COLLATERAL

About Project: I designed this front-and-back one-sheet to be client-facing in support of the launch of a new landing page initiative at SR. I also spearheaded the initiative and flew to several markets to launch it in person.



Spectrum REACH

Targeted Offer Pages

Custom landing pages designed to convert prospects into customers

- ✓ Beautifully-designed, standalone web pages tailored to one specific offer or value proposition.
- ✓ Built from the ground up to maximize conversion, turning more prospects into paying customers.
- ✓ Continually optimized with powerful split-testing tools and success measurement metrics.
- ✓ Perfect for promoting a specific event or sale!
- ✓ Ideal for boosting the sales of one key product or service!

Experience these benefits and much more!

A simple, collaborative process:



1 Identify Unique Offer and Create Call to Action



2 Design Landing Page & Matching Creative Ads



Getting clicks on your banner ads is only a part of an effective conversion strategy to turn prospects into customers.

A custom landing page will close that loop and dramatically increase the efficiency of your advertising.



A strategic call to action is selected to match the goal of your offer

Some common calls to action include:

- Print a Coupon
- Get a Quote
- Buy Tickets
- Reserve Your Spot
- Call Today
- Get Free Trial
- Claim Free Sample
- Try Demo
- Learn More
- Submit Request
- Sign Up
- Join Newsletter
- Email Us
- Print Directions
- Watch Our Video
- Scan QR Code



We optimize your page's conversion rate through split testing

Testing is a critical component of any effective digital strategy. Through A/B testing, we can take an already-great page and keep making it better throughout the life of your campaign.

How It Works!

- 1 We create multiple versions of key landing page elements, including
 - Heading
 - Subheading
 - Images
 - Background Color
 - Call to Action
 - Button Size/Color
 - Benefit Statements
 - And More

- 2 We measure the variants head-to-head and see which leads to higher engagement & goal conversion. Performance metrics monitored include clicks, reads, bounce rate, opt-ins, and more.

3 In consultation with you, we select split test winners. These become the new standard, and more variants are measured against them. This way, the bar is continually being raised.



Your landing page is expertly designed to increase conversions

We design your landing page to be equal parts art and science. Most successful landing pages include most or all of these key elements:



- MAIN HEADING**
Articulates your main value proposition and concisely tells prospect what's in it for me.
- SUBHEADING**
Reinforces or expands upon your value proposition.
- HERO SHOT**
Shows your product or service in action to help prospects envision themselves in that role.
- CALL TO ACTION**
Everything on your page reinforces the single action you want your prospects to take.
- FEATURES/BENEFITS**
Key selling points of your offering, framed as benefit statements.
- SOCIAL PROOF**
Testimonials, reviews or social metrics that give your offering more validity.
- REINFORCER STATEMENT**
A re-phrasing or repurposing of main heading, designed to keep prospect locked in. About halfway down and/or at the bottom of the page.

FREQUENTLY ASKED QUESTIONS

- Q. How long does it take to get up and running?**
A. Once information is gathered, about 2 business days.
- Q. What if I'm not sure what value proposition to offer?**
A. Our team will help brainstorm a great offer with you.
- Q. What URL will my page appear under?**
A. Your page will appear at [www.localoffer.info/\(your offer\)](http://www.localoffer.info/(your offer))
- Q. Can I use a custom URL unique to my business/offer?**
A. Yes, we can help you secure one if you'd like.
- Q. Can I have different landing pages for different offers?**
A. Yes, as many as you want. That's a great strategy.
- Q. Can I include my TV commercial on the landing page?**
A. Video is great - as long as it supports your message.
- Q. Can I sell products (accept payments) through this page?**
A. Yes, but it will require a few extra charges to get set up.
- Q. If I love my page can I expand it to a full website?**
A. Let's do it!

Visit www.localoffer.info to view landing page examples.

Is it time for your digital advertising strategy to evolve?

Back to Home

SALES SHEETS/COLLATERAL

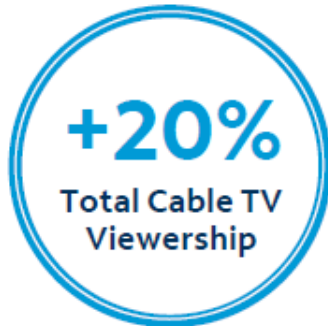
About Project: I created this sheet for use by our internal sales team, with a unique variant for each of our 10+ markets served in the Mountain Region. I went looking for this story in the data on a hunch, and was able to pull out a message that strongly resonated with SR's client base and reinforced the value of its product offering.

Bozeman TV Viewership is Skyrocketing



People are still gathered – they're just gathered around programming & content
As our community becomes increasingly isolated at home, TV viewership is rising dramatically. Individuals and families turn to the TV for relief, for vital information, and to connect together.

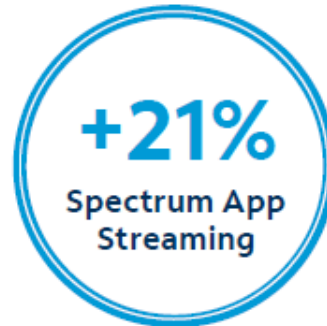
Week of 3/1 → Week of 3/15 in the Bozeman Zone:



219K hrs. → 262K hrs.



48 → 58



20.7K hrs. → 25K hrs.

Networks with Significant Local Viewership Spikes:

	+84%	+29%	
	+50%	+28%	
	+41%	+27%	
	+41%	+27%	
	+21%	+22%	
		+22%	

People are gathering in front of the TV. What messages will they see? Who will stand out in our community? We can help you share your message.

Source: Proprietary Set Top Box Data, Comparison of weeks of 3/1/20 and 3/15/20, Butte/Bozeman DMA, Bozeman Zone

SALES SHEETS/COLLATERAL

About Project: This email marketing message was part of a series I did post Covid-19 pandemic in the Spring of 2020 to help SR's salesforce maintain contact with its customers and provide helpful guidance on advertising strategy during a very unusual time for both client and provider. The contact info was automated using Publisher.

COVID-19
ADVERTISING

DOs & DON'Ts

In the midst of a global pandemic, it might feel like the right time to dial back on marketing. Turns out that the **contrary** is true—there is very little expectation among consumers that brands should stop advertising during the COVID-19 Pandemic, a global study from Kantar finds. In fact, **92% of respondents** said **stopping advertising shouldn't be a priority!**

The study found that people want to see ads that are:

Category	Percentage
HELPFUL	77%
INFORMATIVE	75%
REASSURING	70%
FUNNY	-40%
EXPLOTTATIVE	-75%

The Dont's

- Ignore the pandemic.
- Wait and see what happens
- Respond too many times
- Respond on the wrong platform
- Miss the point
- Fail to learn from the past

Kantar warns that a six-month hiatus on TV advertising could result in a **39% Decrease** in total brand communication awareness!

The Do's

- Keep (or start) Advertising
- Recognize the situation
- Update your website and social media.
- Express a positive hopeful tone.
- Double-check your messaging
- Tell the community about the things you are doing to help.

Let's work together to keep your business and our community strong and prosperous.

ANGELA LYNCH
ACCOUNT EXECUTIVE
805.305.9684 | angela.lynych@charter.com

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SALES SHEETS/COLLATERAL

About Project: Shown here are two examples from a series of email blasts I designed to help sell through television advertising inventory in key sports programming. These were used across dozens of DMAs/markets with customized metrics utilized for each geographic area.

NBA PLAYOFFS!

Limited 2021 Avails now open in Billings

Key Dates & Networks

05/18-05/21	Play-In Tournament	ESPN, TNT (TBD)
05/22-07/22	Playoffs Begin	ESPN, TNT, RSNs
06/07 Start	Conf. Semifinals & Finals	ESPN, TNT
Late July (TBD)	2021 NBA Draft	ESPN
Late July (TBD)	NBA Awards	TNT

Who Watches NBA in Billings?

59% A25-54
\$82K MEDIAN HHI



69,883 HOURS WATCHED

Number of hrs. SR customers watched NBA Playoff Basketball on ESPN and TNT in 2020 in the Billings DMA.



PUT YOUR BUSINESS AT CENTER COURT



NHL PLAYOFFS!

Limited 2021 Avails now open in Billings

Key Dates & Networks

01/13-05/08	Regular Season	NBCSN, RSNs
05/11-05/24	Playoffs Round 1	NBCSN, RSNs
05/25-06/09	Playoffs Round 2	NBCSN
06/10-06/23	Stanley Cup Semifinals	NBCSN
06/29-07/09	Stanley Cup Final	NBCSN (TBD 2 Games)

Who Watches NHL in Billings?

72% A35+
\$91K MEDIAN HHI



34,805 HOURS WATCHED

Number of hrs. SR customers watched NHL Playoff Hockey on NBCS in 2020 in the Billings DMA.



GET YOUR BUSINESS IN THE GAME



MARKETING & BRANDING



MARKETING & BRANDING

About Project: These business cards helped personify the Intrigo brand and create a sense of cohesiveness across all facets of the business. I am skilled at understanding the voice of a particular brand and channeling it in marketing efforts.



Text on back of cards, which corresponded to the business unit of each person at the company:

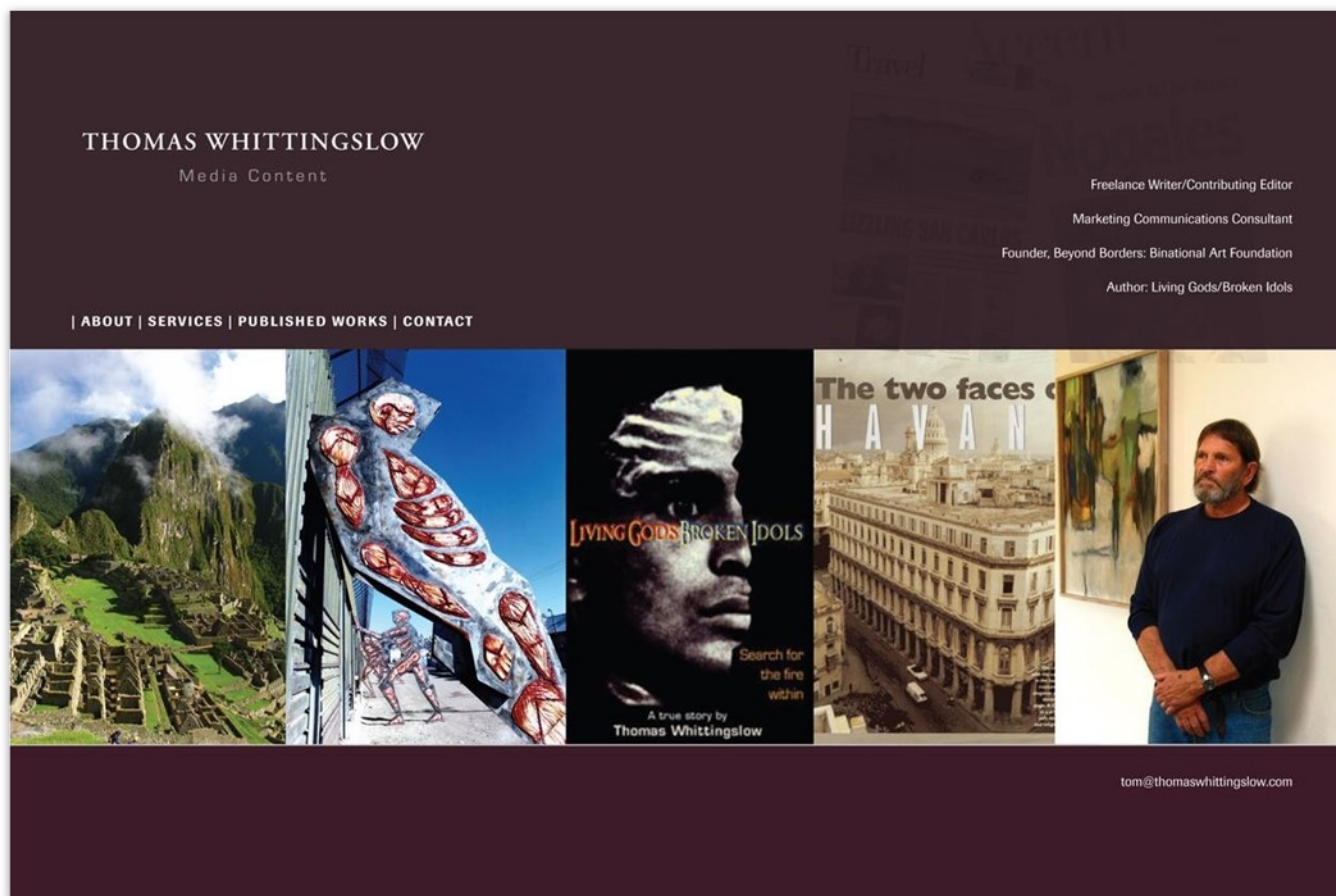
Identity. It's everything about your business that the outside world sees. It's you logo, website, and marketing, and the message they send about who you are. It's your image, and how it helps you shine through the clutter. It's putting your best foot forward. *It's your business, energized.*

Automation. It's the art of efficiency. It's taking the daily, repetitive tasks that slow you down and making them mechanized, streamlined, and powerful. It's improving productivity and workflow. It's cutting down wasted time, money and mistakes. *It's your business, simplified.*

Support. It's ensuring that your system is always ready to go. It's finding innovate ways to handle business, work efficiently, and communicate accurately. It's utilizing technology to gain a competitive advantage. It's having help when you need it most. *It's your business, fortified.*

MARKETING & BRANDING

About Project: Thomas Whittingslow is a nationally published author and was in need of a brand that matched his personality. I delivered a new business card and website featuring earth tones and straight lines.



MARKETING & BRANDING

About Project: This marketing collateral (direct-mail piece top, tri-fold brochure bottom) was created to support the launch of a new auto classifieds brand. I also created branded folders and FAQ collateral for dealers, all built to match the logo.



cars208.com is launching!

Make sure your cars are included in Boise's newest auto marketplace

Free 30-day unlimited upload period!

- ❑ Free exposure
- ❑ Easily add your listings with just a few clicks
- ❑ Connect with buyers using blogs and videos
- ❑ No contracts, no obligations
- ❑ Launches to the public September 1st



A BETTER WAY TO CONNECT WITH LOCAL BUYERS!

Why use Cars208.com?

- ❑ No contracts, ever. List only the cars you want, whenever you want, for just \$10/listing.
- ❑ Connect with buyers using free tools, including your own blog and video channel, private messaging, and more.
- ❑ This user-friendly website is geared toward local buyers, and will be advertised on TV every day, so your cars will be seen and sought out.

Free 30-Day Unlimited Upload Code: **TRYCARS208**

To redeem your code, sign up for a free account at www.cars208.com and enter your code when purchasing the "Unlimited Uploads - 30 Days" plan from your account menu. For help, just send us an email. The last day to initiate this code is Sept 15th.

Visit www.cars208.com/learnmore to find out more about how Cars208.com can help your dealership. We're new, we're local, we're different, and we're excited to hear from you. Let's get started!

CALL US: 208.918.0927 EMAIL US: sales@cars208.com



Redeem
Coupon Code
on Back


AUTO CLASSIFIEDS +

Cars208 is much more than an auto classifieds platform - it is a tool you can use to build relationships. Let's face it, buying a car is personal. And buyers are looking to connect, to learn, and to invest in the buying process.

With Cars208, you can connect with these buyers through built-in site tools. By providing consumers what they really want - information - you can create organic connections that build brand loyalty.

Using your own free blog, bulletin board, video channel, forum thread, and more, you can market yourself strategically. You'll build trust, increase confidence, broaden knowledge, and ultimately help people make that purchase - chosen from your well-featured inventory.

It's auto classifieds, plus more - helping you connect with today's information-driven consumers to successfully win their hearts, minds, and, most importantly, their business.




AUTO CLASSIFIEDS, SIMPLIFIED

Cars208 is an attractive, user-friendly classifieds platform for local Boise car shoppers. Simple and effective for searches, it is the perfect showcase for your inventory. Best of all, there are no contracts, no subscriptions, and no obligations. List only the cars you want, whenever you want - for just \$10 per listing. The math is easy: finding a comparable value is not.

Listing details:

- ❑ 50 pictures
- ❑ 5 videos
- ❑ List for up to 60 days
- ❑ Make any listing "Featured" for \$5 extra

With our intuitive account management tools, you can edit, renew, upgrade, or delete a listing at any time.



Cars208 is a low-cost, no-contract solution that drives prospects to your dealership. At just \$10, each listing is a bargain that generates marketplace visibility, conversations, and increased opportunity to make sales. Try Cars208 today to see how engaging consumers with content is the key to winning more business.

THE + FACTOR

Cars208 offers something more than any competitor: Local Classifieds PLUS. The unique pluses we offer can help boost your position in the marketplace and forge personal and meaningful connections with today's web-savvy consumers.

Connect right away with your customers through:

- ❑ **BLOGS** - We provide you with your own free blog. Update your blog frequently with relevant information to build a loyal readership. Provide info about your inventory, events, and general tips for prospective car buyers and owners.
- ❑ **BULLETINS** - Inform Cars208 users of events and specials with quick-hitting snippets which post to a common bulletin board. Include reminders of sale dates and events, current financing specials, new inventory arrivals, and more.
- ❑ **PRIVATE MESSAGE** - Our accessible messaging feature helps you stay in touch. Buyers can send you private messages from multiple pages on the website including any of your listings. Answer questions, be a resource, and convert inquiries into solid leads.
- ❑ **VIDEO LIBRARY** - With your own video channel, you can post any video to the site's video library where users can watch, rate, comment, and link directly to your YouTube page. Include model overviews, general tips, and your TV commercials.
- ❑ **FORUMS** - As a Cars208 dealer, you will have your own top-level thread with admin privileges. By posting on our forums, you make yourself accessible to potential buyers. Provide useful feedback and answer questions to build trust and loyalty.

THE TAKEAWAY


What makes Cars208.com different?

Cars208 is different than any other option in the auto marketplace in several ways:

- ❑ It's local. Cars208 is advertised and marketed locally. It is a top choice by shoppers nearest you who are ready to buy in the Boise market.
- ❑ No contracts, ever. You're in control at all times. List every car in your inventory or just your top 10 best sellers. It's up to you.
- ❑ It's where the buyers are. Cars208 is advertised on TV every single day and is heavily marketed in the area, creating high visibility and web traffic.
- ❑ It helps you connect. More than a classifieds platform, Cars208 is a marketing tool that provides you the opportunity to use blog, forum and video content to build relationships and attract consumers who are in all phases of the purchasing cycle. And all of these tools are free.

By marketing with your unique content, not just listings, you can:

- ❑ Increase market visibility
- ❑ Foster brand loyalty
- ❑ Communicate important information
- ❑ Convey accessibility to buyers
- ❑ Mine for prospects
- ❑ Fill your pipeline
- ❑ Take your entire brand into the digital space



TRY IT OUT, FOR FREE


Of course, the best way to understand how Cars208 can benefit you is to try it out firsthand. It's absolutely free to do so, and you can list as many cars as you want during your 7-day trial. Any car listed will stay active for its full 60-day cycle, and you can continue to use our free content tools for as long as you'd like.

To start your free trial or for more information, email sales@cars208.com, or call 208.918.0927. We look forward to helping you get started.

- ❑ CALL US: 208.918.0927
- ❑ KNOW US: www.cars208.com



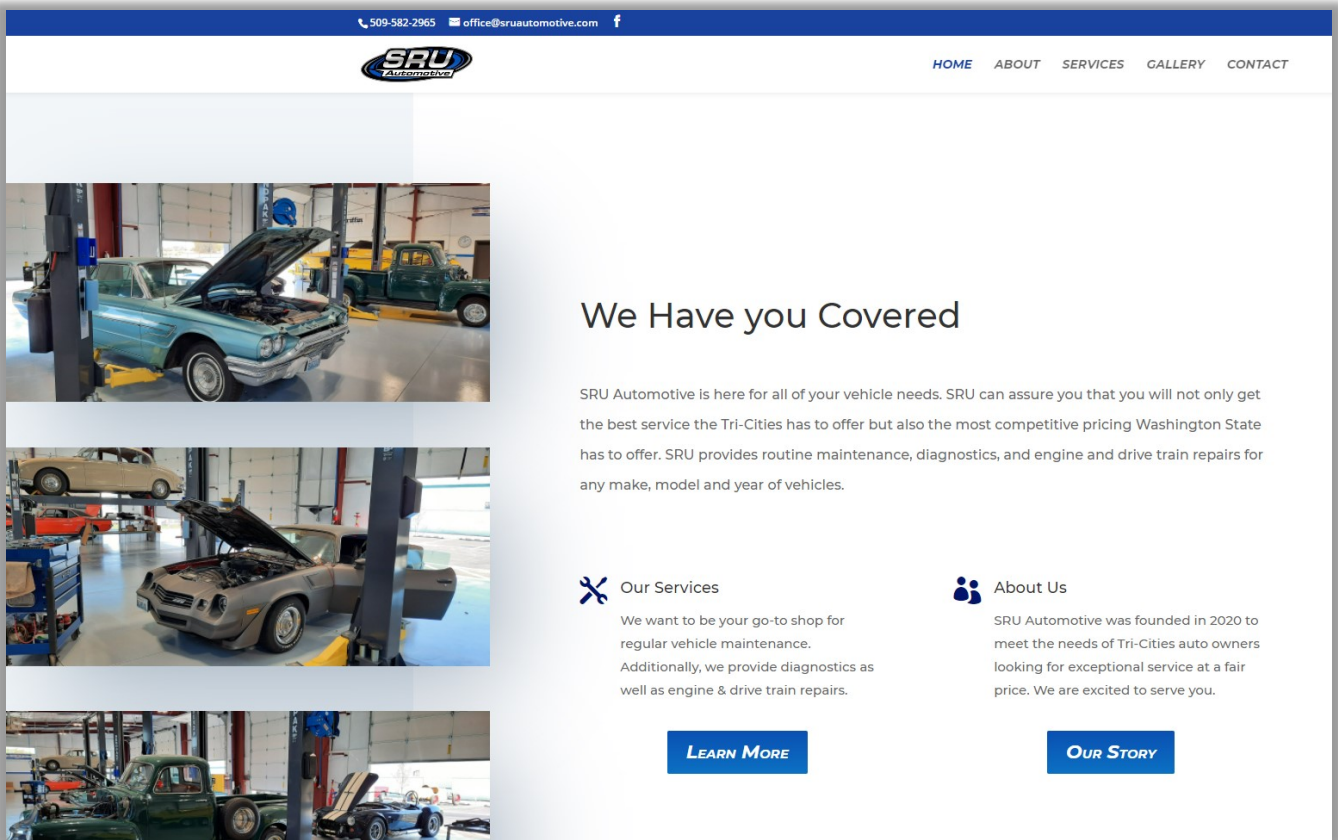
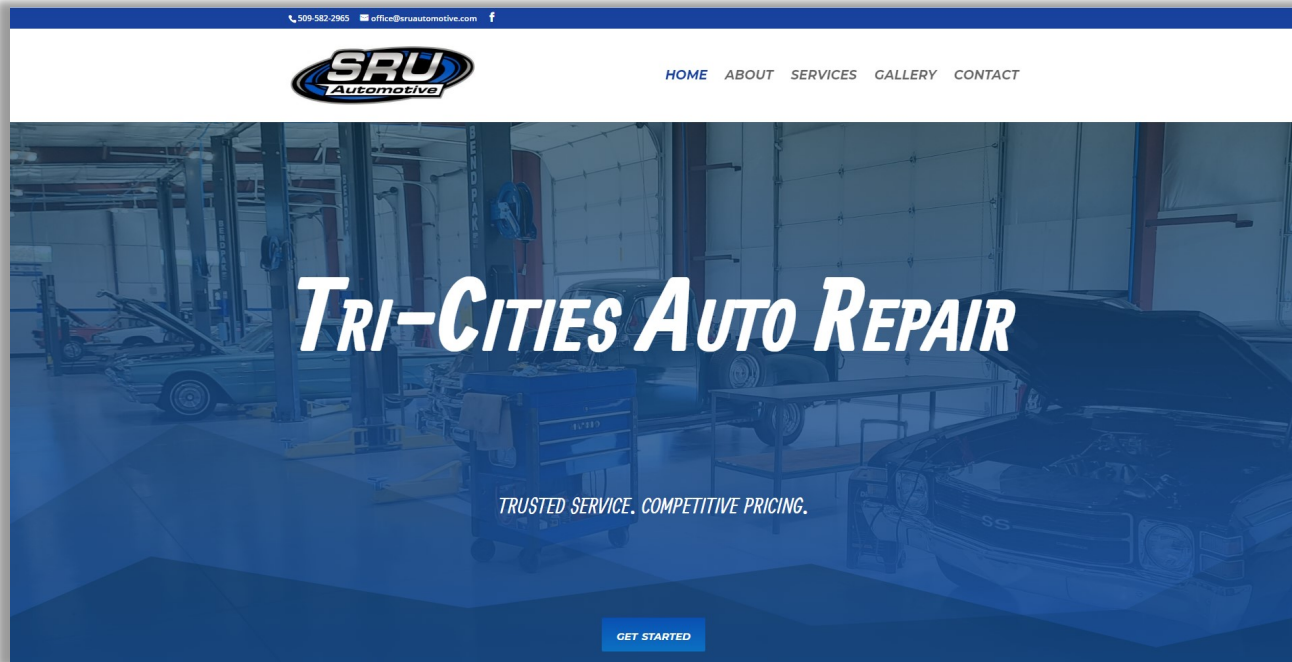
HELPING YOU CONNECT WITH BOISE CAR BUYERS



MARKETING & BRANDING

About Project: I built this website for an auto repair dealer. I have built dozens of websites and landing pages utilizing the wordpress.org infrastructure. I can integrate analytics, A/B test images and text, and track actions and conversions.



STORIES IN DATA



STORIES IN DATA

About Project: This is an excerpt from a report I put together detailing my findings of the impact that various client discounts and offers had on longer-term revenue retention. The goal was to understand what offers and client-service approaches could potentially be emulated/scaled to other markets in the company.

THE MOUNTAIN STATES

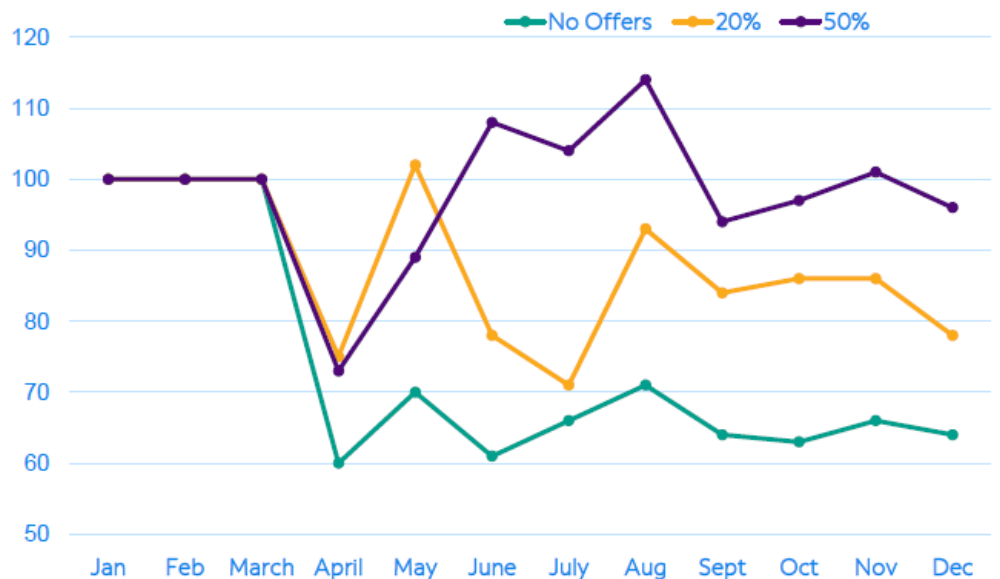
Top Commodity Codes - Shifts by Variable

Variable	3/1 REV	4/2 REV	% Change	6/30 REV	Total Change
Automotive					
All Clients	\$1,583,886	\$1,473,132	-7%	\$1,460,609	-8%
20% Provided	\$783,249	\$782,668	+0%	\$806,667	+3%
50% Provided	\$630,002	\$669,411	+6%	\$669,563	+6%
Meal Offer/Accepted	\$730,318	\$687,660	-6%	\$648,412	-11%
Retail					
All Clients	\$964,943	\$914,966	-5%	\$932,051	-3%
20% Provided	\$462,011	\$462,011	0%	\$462,011	0%
50% Provided	\$423,831	\$423,831	0%	\$423,831	0%
Meal Offer/Accepted	\$196,131	\$196,131	0%	\$196,131	0%
Home Services					
All Clients	\$562,131	\$562,131	0%	\$562,131	0%
20% Provided	\$135,141	\$135,141	0%	\$135,141	0%
50% Provided	\$275,431	\$275,431	0%	\$275,431	0%
Meal Offer/Accepted	\$225,631	\$225,631	0%	\$225,631	0%
Financial Services					
All Clients	\$359,621	\$359,621	0%	\$359,621	0%
20% Provided	\$182,601	\$182,601	0%	\$182,601	0%
50% Provided	\$15,291	\$15,291	0%	\$15,291	0%
Meal Offer/Accepted	\$92,561	\$92,561	0%	\$92,561	0%

THE MOUNTAIN MARKETS

No Offer Versus Offer Type

Normalized to 100 for March Revenue final to show percent shifts

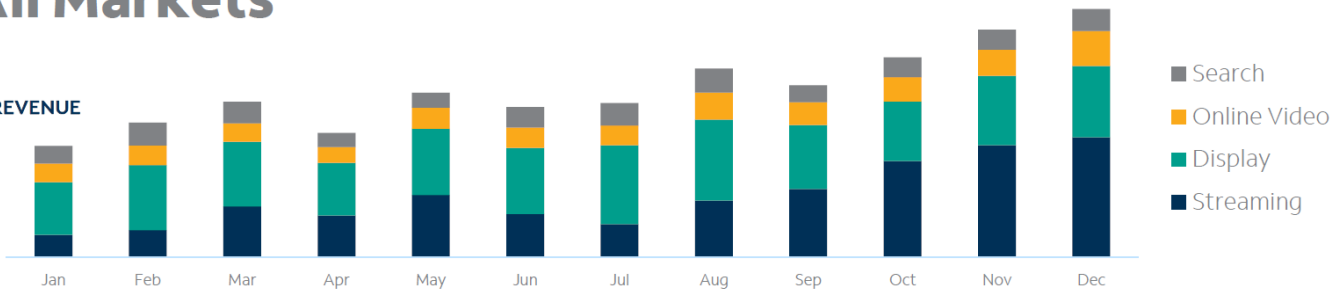


STORIES IN DATA

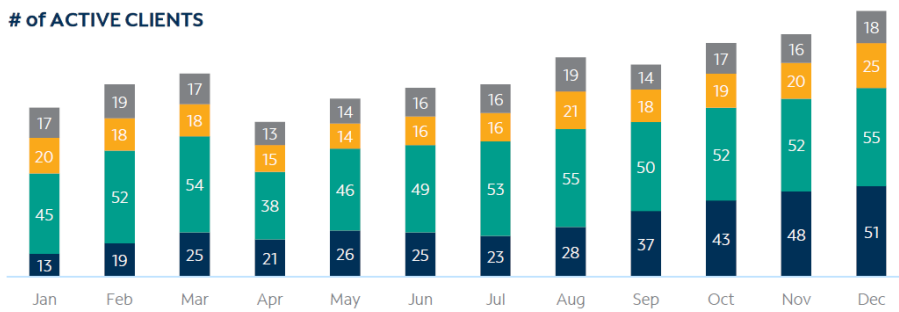
About Project: This is an excerpt from a product category sell-through presentation I put together to highlight YOY trends by product/channel across different geographic areas. I included a “takeaways and recommendations” slide for the sales leader of each specific market in order to focus sales and training/education efforts.

All Markets

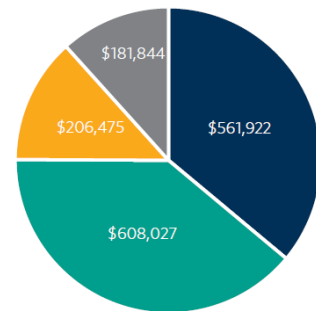
REVENUE



of ACTIVE CLIENTS

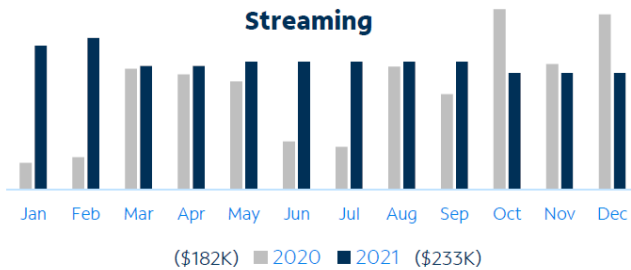


ANNUAL REVENUE

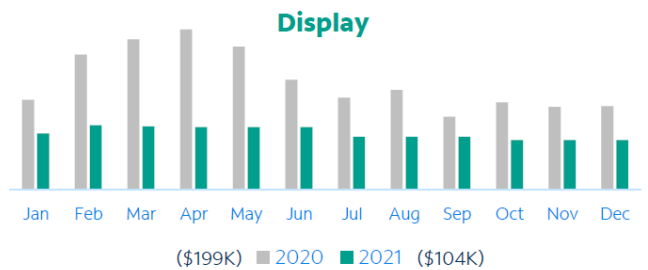


WYOMING

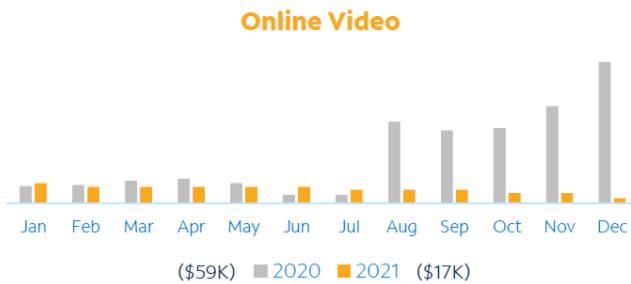
Streaming



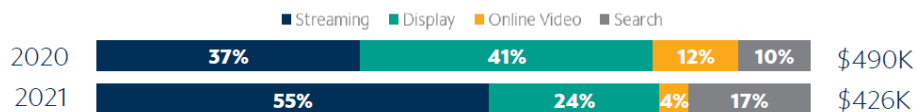
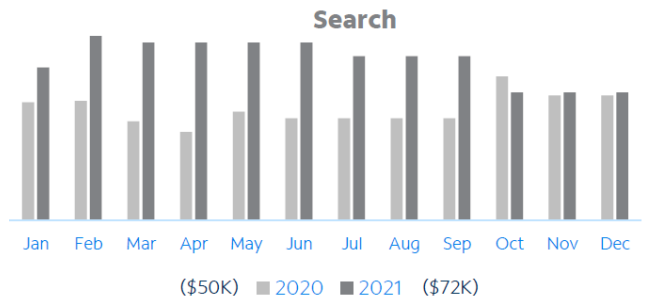
Display



Online Video



Search



STORIES IN DATA

About Project: This case study was part of a series of Google Analytics case studies designed to show real-life examples of how advertising drives website traffic. In this example, the client had two commercials in a Monday Night Football double-header and each produced a significant spike in traffic post-airing.



impact of local ads in live sports

build awareness to drive valuable online engagement

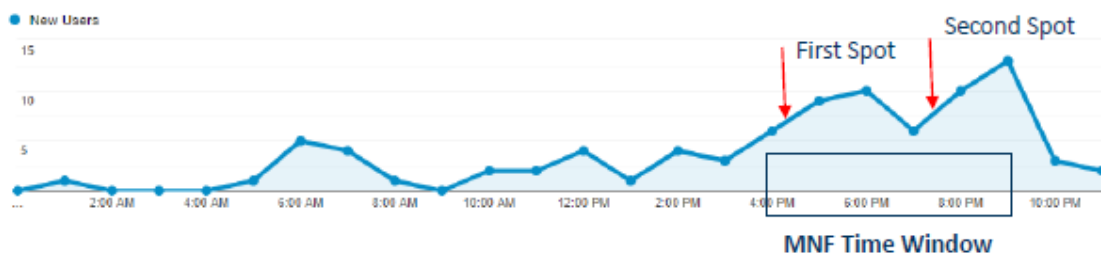
Real-Life Case Study

A local car dealer airing in MNF opening weekend (*Raiders v. Broncos & Saints v. Texans*) saw **70% more unique users** visit their website during the game. The client has seen an average 67% lift in total web traffic on Monday nights during MNF.

74%

of client's daily product interactions occurred during the MNF game

Hourly New Web Users during *Raiders v. Broncos & Saints v. Texans* double-header games



Impact of Television vs. Live Sport TV Advertising

Television

87% of 125 brands that increased their TV ad spend saw web traffic increase by 24%. **

Live Sports on TV

YoY 113% more users visited the advertiser's website through search on the day of Monday Night Football.

Ready to see how live sports can accelerate your real-life business?
Contact your local Spectrum Reach office.



*During the game 70% more unique users visited the website through search during the game, than in the 4 hours before the game. Out of all vehicle interactions (clicking on listing to see full details) 74% occurred during MNF. Based on Sept. 9th, 2019 game. 67% more users visited the website on a six-week average compared to the six weeks before airing in MNF. **Source: VAB, The TV-Traffic Correlation for call-to-action-brands

STORIES IN DATA

About Project: I was tasked with giving a presentation on best-practice utilization of two internal technology platforms. To begin, I identified high-performing individuals at the company for each platform using commonly accepted metrics of success, and then I designed a survey soliciting their input. I organized their responses to find common themes and takeaways, and then provided scalable recommendations and paths forward based on these common best-practices and challenges.

Solicited Feedback

- Asked 14 high-performing Big West AEs for feedback about how they utilize and maximize the platform
- Most have **60%+** of their 2021 linear flowing through AA + HPOAA. All are exceeding 45%.
- Received feedback from:

Christine Erb
Lucas Dean
Doug Floyd
Julie Thomason
Linda Carter
Michael Young

Dawn King
Barbara Geary
Todd Andrews
Savannah Carsten
Shenandoah Milan
Steven Anderson

Common Themes and Takeaways



Main Value Propositions Used in Client Pitch

- High Reach & Frequency
- 1st Party Data (No one else has)
- Maximized Impressions
- Data-Driven (Removes Bias)

Best Practices

- Do a comparison to an alternative schedule to highlight impressions, spots etc.
- Trust your AP and give them good info about the target audience to drive inputs
- Blend AA and non-AA linear depending on client (some may be 30% and some may be 80% depending on their goals, but it's not an all or nothing proposition)
- Keep it simple/don't get in the weeds/sell reach & freq. and give summary #s
- Majority do not use the term "Audience App" but rather speak to data
- Majority do not use in a live environment except as a capability demonstration

Objections & Challenges

- Clients don't always want overnights
- Perception it's remnant inventory
- Can't include client "must-have" nets
- \$500 **zone** threshold prohibitive
- Uneven zone disbursement
- No R&F numbers at fingertips

TRAINING & EDUCATION



TRAINING & EDUCATION

About Project: After my team absorbed some new responsibilities in a restructure, I needed a way to quickly get them up to speed without creating overwhelm. I developed a training consisting of a weekly checklist (the what) along with a series of videos delivered via Vimeo Showcase (the how). I worked with subject matter experts internally and recruited several to record segments for the training so that there was variety in the voices/people on screen. The training was adopted by many other markets and position groups.

CAMPAIGN MANAGEMENT CHECKLIST

SCAN ALL CAMPAIGNS (2-3X WEEKLY)

GENERAL PERFORMANCE

- Flight Dates - Make sure they are correct (follow up in SF as needed)
- Pacing/OTI - Check that it's on track (follow up in Pacing Report as needed)
- Budget - Make sure it matches expectations by campaign/product

ALERTS (HOVER FOR DETAILS)

- Retargeting Triangle - Double-check retargeting in full reports (as warranted, grab pixel from settings wheel and send to client)
- Creative Calendar - Check dates of the upcoming missing copy

REPORTING SNAPSHOT (CLICK CAMPAIGN NAME WITHIN ROW)

- Activity - Make sure impressions are firing/trending as expected
- Geography - Check for correct geos (click expand charts to see)

YOU CAN SEARCH BY

- ✓ Client
- ✓ Campaign Name
- ✓ Market
- ✓ Product
- ✓ Campaign Status

CREATIVE (UNDER SETTINGS WHEEL)

- View Creative - Click view creative to check for accuracy/seasonality
- Landing Page - Ensure landing page is correct/matches the current creative
- UTM Code - Check for proper embedment of UTM code in landing page

TIP: For campaigns with ending status (ending within 7 days), make sure there is a plan of continuity for the account/client. **NOTE:** Streaming TV Campaigns do not appear in the campaigns tab of AT. Please check them individually in AT Reports & the STTV Pacing Report.

CLIENT-LEVEL DEEP DIVE (1X WEEKLY, AND AS WARRANTED)

CAMPAIGNS OVERVIEW SCAN (BY CLIENT)

- Product Mix is Correct/Complete
- No Unexpected Impression Gaps
- All Known Campaigns are Live
- Retargeting Impressions Firing

USER ENGAGEMENT

- CTRs and VCRs - Ensure benchmarks are being hit/exceeded
- View Throughs - Validates creative is resonating & retargeting is active

PLACEMENTS

- Site Placements - Look at both performance and client optics
- Retargeting - Isolate to analyze retargeting effectiveness

BENCHMARK MINIMUMS

- ✓ Disp. CTR = 0.04%+
- ✓ OV CTR = 0.2%+
- ✓ Search CTR = 1-2%+
- ✓ OV VCR = 60%+
- ✓ STTV VCR = 94%+

GEOGRAPHY

- Geos - Ensure goes are correct and look for high or low performers

CREATIVE

- Copy - Ensure correct creative is live (current, matches campaign)

SEARCH (CLICK INTO MERCHANT CENTER)

- Performance - Check Impressions, Top Keywords, Imp. Share and Top Imp. Rate

LIFT

- Showing? Review 50k impressions for 7

Campaign Management 101

Learn how to monitor your advanced campaigns with focus, efficiency, and impact.

Share

<h3>INTRO</h3> <p>Spectrum REACH</p> <p>Intro to Campaign Management 101</p> <p>→ Will To Win TV</p>	<h3>CAMPAIGN MONITORING IN AUDIENCE TRAK</h3> <p>Spectrum REACH</p> <p>Campaign Monitoring In AudienceTr...</p> <p>→ Will To Win TV</p>	<h3>PACING</h3> <p>Spectrum REACH</p> <p>Pacing</p> <p>→ Will To Win TV</p>	<h3>RE-TARGETING</h3> <p>Spectrum REACH</p> <p>Retargeting</p> <p>→ Will To Win TV</p>
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TRAINING & EDUCATION

About Project: I created this exercise/assignment to bolster my team's (and several other teams') knowledge about a particular internal tool. I distilled the different "indicators" by spending time in the tool myself, and then I crafted a streamlined assignment that became a staple of morning sales meetings around the enterprise.

Auto Analyzer: Storytelling

Goals for Existing Clients:

- Justify value and create attribution by highlighting positive stories that correlate/map to existing strategy
- Identify incremental growth opportunities to reinforce existing strategy and/or capitalize on new geographies/audiences

Goals for Prospective Clients:

- Identify areas of dealer underperformance against market, competitors, or broader make to highlight existing strategy gap (if applicable)
- Pinpoint reasons for underperformance, and/or illustrate strategic opportunities to win share in key areas (geographies, models, etc)

Potential Indicators You Can Look For



Market Composition

New/Used

- What are sales trends across both new/used inventory?

Make

- What is the make share and how is it shifting?
- Is the dealer's make up or down?

Segment

- What segments are performing the best/worst? Does this create a particular opportunity/risk for the dealer?

Geography

- What areas are driving sales?
- Is this shifting and why?



Dealer Performance

Sales Volume

- Are total dealer sales trending up or down?

Share

- Is the dealer's total market share increasing/decreasing?
- Is the dealer's share of their own make increasing/decreasing?
- What is the dealer's share of key segments and are there shifts?
- Is the dealer over or underperforming in certain geographies?

Vs Competitor(s)

- How is the dealer faring against a key competing make/dealership?



Dealer Sales Composition

Model

- What models are key sales drivers for the dealer?
- Are key model sales/share trending up or down?
- Are key competitor model sales/share trending up or down?

Geography

- What zones/zips are driving sales? Share by zone?
- Is this shifting and why?
- How well do sales align with the Spectrum footprint?
- Is there opportunity for growth in non-TV zips via advanced products?



Storytelling Assignment

- 1** Pick a dealer that represents a viable opportunity
- 2** Find a story that aligns with one of the corresponding goals above
- 3** Share your story visually in Auto Analyzer and explain your reasoning
- 4** Field team questions/brainstorm ideas for appropriate next steps

TRAINING & EDUCATION

About Project: Looking to deliver timely, relevant info to many internal stakeholders while avoiding yet another email that got lost in the shuffle, I developed and created a monthly educational video series called SupportCenter (a riff on SportsCenter). I hosted the first episode before turning the reigns over to others on my team (and adjacent to it) to help give them valuable leadership and project management experience.

Segments

We'll have several (but not all) of these each month. They'll rotate through based on the ideas we get from the support team.

Victory Lap

Team-centric success stories that are scalable to other markets

Stat Sheet

Key high-level statistics we can share (media consumptions, brand appeal, etc)

Touchpoint!

Client-facing touchpoints (email blasts, one-sheets etc that we can unveil

The Scouting Report

Info on industries, prospects, tie-in events, etc that would be viable, timely opportunities. Lead opportunity. (Kylie Wray owns)

The Checkered Flag

Auto-specific segment that focuses on Analyzer, Polk, Cop, and can include guests

You Gotta See This!

Visual demonstration of core/key/new functionality of the tools we use

Tee'd Up

Share creative or campaign ideas that have worked in other markets, or we've found in AT.

Blocking & Tackling

Highlight the fundamentals of product execution & fulfillment, relevant to AEs.

Top 5 Tips of the Week

Chance to highlight quick tips/tricks from people around the region, in a countdown format

Sideline Report

Bring in guest speakers and interview them to showcase expertise and timely info. (Marketing, Advanced, Sales, MRI, etc)

MVPs

Employee recognition segment where SSMs can highlight some of your great individual contributions

Starting Lineup

A chance to introduce the full team in individual offices, similar to in a sports broadcast. This will rotate to a new team each month



CLICK TO PLAY!

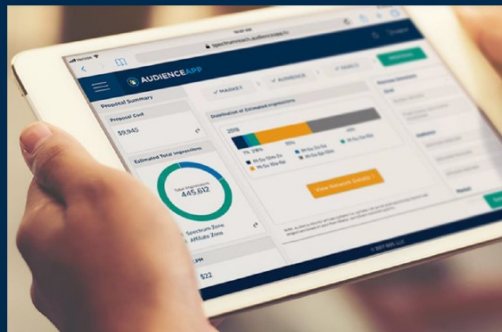
SUPPORTCENTER
OCTOBER EDITION

TRAINING & EDUCATION

About Project: This is the beginning of a training I delivered in 2018 to a group of about 45 individuals in Bozeman, MT. I am experienced at pulling together educational trainings that are concise, substantive and interactive. And, I can deliver this type of training as needed, including remotely via teleconference.

AUDIENCE APP & FINDER

Spectrum
REACH



AGENDA

- **The Power of our Data**
- **Audience App**
 - Feature/Functionality Highlights
 - **Value Propositions**
 - **Live Demo**
 - **Objections/Concerns/Questions** (Kylie and Dennis)
 - **Pitch Exercise**
- **Audience Finder**
 - Latest Features & Functionality
 - Additional Targeting Capabilities
 - Stories in the Data
- **Jeopardy Game** (Dennis)

Spectrum
REACH

2

LEADERSHIP

MOUNTAIN CLIENT SUCCESS TEAM

TEAM VALUES

We Assume the Best

We give each other the benefit of the doubt, and operate from a place of assuming good intentions. This is the foundation of trust, and we earn this trust every day by the way we treat and interact with each other.

We Have Each Other's Backs

We look out for each other, and are there to help each other when help is needed. We understand that success is a group endeavor, and that what is good for the group is good for us all. We operate with empathy and kindness.

We're Honest and Open

We value and facilitate an open team culture where we can express ourselves in an honest and respectful way, and expect to be heard and valued. We do everything in the open, authentically, as professionals and teammates.

We Welcome Change

Not only do we embrace change as it happens, we facilitate positive change by looking for new ways to attack our jobs and goals. We question old habits and listen thoughtfully to fresh thinking. We seek to evolve what we do.

We Find a Way Forward

We know that we will face challenges every day, and we maintain a positive, forward-thinking mindset. We are flexible and resourceful, and we find workarounds and alternate paths when we run into obstacles.

We Take Pride in Our Work

We are proud of our leadership position in the Mountain Region and across all of Sales Support. The consistently excellent work we do is a reflection of this pride of ownership. We hold ourselves to a very high standard.

We Step Up

We continually look for ways to help our AEs and our teammates, and insert ourselves in leadership and ownership roles wherever we're able. We facilitate ideas and solutions, directly or indirectly, even when it's "not our job".

We Shine a Light

We celebrate each other's wins and successes, and shine a light on those who help us or make a positive difference in our day. We look for and find opportunities to communicate our appreciation and our gratitude.

Spectrum
REACH

LEADERSHIP

About Project: These are the team values I developed for my team at SR. I worked hard to make sure everything we did as a group or as individuals was in alignment with these values. This is one component that helped this particular team of 14 individuals become recognized as the flagship Client Success team within the enterprise.

MOUNTAIN CLIENT SUCCESS TEAM

TEAM VALUES

We Assume the Best

We give each other the benefit of the doubt, and operate from a place of assuming good intentions. This is the foundation of trust, and we earn this trust every day by the way we treat and interact with each other.

We Have Each Other's Backs

We look out for each other, and are there to help each other when help is needed. We understand that success is a group endeavor, and that what is good for the group is good for us all. We operate with empathy and kindness.

We're Honest and Open

We value and facilitate an open team culture where we can express ourselves in an honest and respectful way, and expect to be heard and valued. We do everything in the open, authentically, as professionals and teammates.

We Welcome Change

Not only do we embrace change as it happens, we facilitate positive change by looking for new ways to attack our jobs and goals. We question old habits and listen thoughtfully to fresh thinking. We seek to evolve what we do.

We Find a Way Forward

We know that we will face challenges every day, and we maintain a positive, forward-thinking mindset. We are flexible and resourceful, and we find workarounds and alternate paths when we run into obstacles.

We Take Pride in Our Work

We are proud of our leadership position in the Mountain Region and across all of Sales Support. The consistently excellent work we do is a reflection of this pride of ownership. We hold ourselves to a very high standard.

We Step Up

We continually look for ways to help our AEs and our teammates, and insert ourselves in leadership and ownership roles wherever we're able. We facilitate ideas and solutions, directly or indirectly, even when it's "not our job".

We Shine a Light

We celebrate each other's wins and successes, and shine a light on those who help us or make a positive difference in our day. We look for and find opportunities to communicate our appreciation and our gratitude.

LEADERSHIP

***About Project:** Heading into 2021, my team at SR was coming off of a hectic year and had recently been assigned additional responsibilities as part of a role convergence. I developed this roadmap to ensure that they understood what was expected of them and how we would get there. I then ensured that all subsequent trainings and initiatives were squarely in alignment with this foundational document.*

2021

MOUNTAIN CLIENT SUCCESS ROADMAP

ADVANCED ADVERTISING KNOWLEDGE/EXPERTISE

- Be a partner to and advocate for your AEs in terms of hitting 2021 MSE (50%), DE (30%), and AA (40%) metric goals. **AP AC**
- Understand the value proposition(s) of every product in our advanced advertising lineup. **AP AC**
- Be able to position each product appropriately and with confidence, educating AEs (verbally) and clients (via the client-facing materials you produce) as needed. **AP**
- Build off the momentum of Streaming TV (aggressively push continued growth), place renewed emphasis on SEM as our key product to close out the bottom of the funnel, and purposefully strategize ways to position Display and Online Video as unique complementary products to video (linear + streaming) in order to maximize overall share. **AP**
- Continue to self-educate and internalize order-processing protocols unique to each product, leaning in to peer trainings and building out written materials as needed. **AC**
- Have a command of required steps and timeline/lead-times for both pre-sale and post-sale processes, and continually educate and advise sales team accordingly in order to ensure we help deliver a positive client experience and maximize revenue. **AP AC**

REPORTING, ANALYTICS & CAMPAIGN MANAGEMENT

- Assume a primary role in monitoring campaigns (proper pacing, retargeting pixel, correct creative, etc) while they are live. **AP AC**
- In addition to utilizing AT to monitor pacing/OTI metrics, leverage the Pacing Report situationally to follow up on anomalies, and periodically to take a deeper look at campaign pacing for the market(s) you support. **AP AC**
- Increase ability to interpret campaign performance metrics (via AudienceTrak) and make corresponding recommendations for campaign extensions, additions and adjustments in the name of retention and incremental growth. **AP AC**
- Build a baseline understanding of Google Analytics, obtain your individual GA certification by passing the exam, and make gains in your ability to identify positive attribution back to SR via this platform. **AP AC**
- As facilitated by CSMs, maintain responsibility for filling in Campaign Performance Recap (CPR) sheets for specified clients. **AC**
- Build out custom monthly reporting for key clients as deemed appropriate by CSM, AASM, and LSM. **AP AC**

PROCESSES AND TOOLS

- Embrace new processes being rolled out by the enterprise, including an updated DIR process and a Unified Proposal rollout. Look for new efficiencies and capabilities that you can leverage for your team, and lean in to the change. **AP AC**
- Commit to continued refinement with regard to existing processes and tools, self-identifying possible gaps and working independently or with your CSM to help shore these up. **AP AC**
- Assume greater ownership of the automotive space by spending substantive time in Auto Analyzer, and becoming versed in how to fill in the new auto template with data and storylines unique to your markets and dealerships. **AP**
- Deliver unparalleled *client success* by fine-tuning your workflow to prioritize accuracy and seamless execution. Build in appropriate safety nets, double-check work, and carve out the warranted time/space around projects to achieve excellence. **AP AC**

REVENUE CREATION AND LEAD GEN

- Leverage the principles of the *Smart Prospecting Guide* and the *Prospecting Playbook* to proactively identify and capitalize on local opportunity to grow existing revenue, find and help convert new prospects, and build our book of business. **AP AC**
- Maintain dialogue with your AEs and LSMs to ensure that your energy and efforts are in alignment with their goals and will be beneficial to the overall market-level efforts. **AP AC**
- In collaboration with CSM, identify a timely focus for AMPLIFY and track all related activity in SF. **AP**

LEADERSHIP

About Project: Project AMPLIFY (branded to accentuate the A and the P) was an initiative I created to help push our Account Planners (APs) with regard to proactive revenue creation, while attempting to quantify those efforts with nuanced naming conventions and reporting in our CRM (Salesforce). This initiative was a significant success, and positioned our AP team as thought-and-action-leaders within our division.



SCOPE:

Timeframe: March 9th – June 26th

APs Included: All Legacy Mountain APs (9 total)

Geographic Scope: WA, MT1, MT2, WY, GJ

Group Initiative:

New Business/Prospecting Initiative

Summary: Each AP has a major focus on identifying and cultivating new business prospects in their respective markets, in an effort to increase our overall book of business and help facilitate incremental revenue. APs will prioritize: existing advertisers on other mediums, businesses with employees that we have an existing relationship with (AP or AE), specific verticals where we have an identified growth opportunity in the market and/or have a competitive advantage we can leverage within this vertical, and prospects that are clustered geographically. APs will work to warm up leads by cold calling, email prospecting, and/or providing materials and industry/company intelligence that enables us to have a more meaningful dialogue with the prospect.

SMART Goals (Measured by June 26th 2020):

- 4 New Business closes per AP (36 Total)
- 8 Reciprocated Client Interactions per AP (72 Total)
- Combined New Business Revenue Goal: \$150K

Tracking/Salesforce Naming Conventions:

- AMPN for opportunities related to the group New Business initiative

LEADERSHIP

About Project: I developed this Smart Prospecting Guide as a companion piece to the aforementioned Project AMPLIFY. It codified all of our known best practices about lead gen and prospecting into one, easy-to-reference document. This document was subsequently co-opted by the broader enterprise and used by many departments.



Identify Promising Client Traits (Start Externally)

THESE THREE POSITIVE IDENTIFIERS SHOULD BE PRIORITIZED WITH EVERY PROSPECTING APPROACH

1

Existing Advertiser

- Find leads by monitoring local media channels, including radio, print, outdoor, broadcast TV, and social media channels including Facebook, Twitter and Instagram (among others)
- Take note of local banner ads that you see on web pages, or local video ads that appear before video content that you consume.
- Type vertical-specific search terms (chiropractor) into Google, and take note of the paid search advertisers that appear in Sponsored Ad results. These prospects may or may not be happy with their Paid Search, but they are prime prospects for other types of advertising either way.

2

Existing Relationship

- If you have an existing relationship with a decision-maker, you can try to...
- If you have a relationship with a non-decision-maker, you can try to find...
- You can leave your business card behind at places you patronize, and/or...
- Networking at chamber events can be a great way to develop more relationships...

3

Proud/Excited/News to Share

- A client that is excited about something is probably more likely to want to advertise via advertising. You can scan social media, news sites, chamber site, etc.
 - New location/remodel
 - Name change/re-brand
 - New ownership
 - Special anniversary sale or large event
 - New product line or expanded service offering
 - Special award or recognition



Match Our Offering to Potential Prospects (Start Internally)

Look at our Products/Tools

- Are there clients that span a DMA or state that would be a good fit for AdsE?
- Are there bottom-funnel industries (locksmith) that we could approach with Paid Search?
- Can we prospect based on ability? For example, can we take a specific propensity in Audience App and match it to a list of prospects, with a ready-made pitch?
- Are there any auto dealers (perhaps smaller, used lots, or niche lots specializing in trucks) that we haven't spoken to recently that could benefit from our ability to target auto intenders, or our ability to view sales by zip in Auto Analyzer/Catalyst?
- Are there any large agencies (as existing clients or prospects) that could benefit from white label reporting? Do they meet the impression threshold for this pitch?

Look at our Inventory

- Are there avails in any of our upcoming sports inventory, and would those avails resonate more strongly with a specific type of business?
- Can we put together inventory-packages based on low sell-through levels (as identified in InnVision or with the PPM) that would be beneficial to a certain type of business? DIY for home improvement? TLC and EI for beauty? The list goes on.
- Are there local ties/interests to specific programs/sporting events?
- Are there new networks being launched in your markets? If so, we can grab the attention of new advertisers with exciting new program options that help them connect with their audience?



LEADERSHIP

About Project: I put together an afternoon team Olympics event, conducted via WebEx. The event was designed to distract the team from the grind of a post-COVID chaotic world and help them come together in the name of camaraderie and fun. With about 8 individual and team events and significant prizes for all (including hand-made items from the group and the poster shown above), it was a ton of fun and a resounding success with the team.



MAd Libs!

Goal: Work with your team to create a silly, clever and funny advertising mad lib.

- Each team will get a different set of blanks
- Work together to fill them in with creativity
- We'll plug them into one of three unique mad libs and read it out loud to the entire group.
- The group will vote on the winning team.



Prizes

1

Gold

- Sales Support Olympics Gold Medal
- \$50 Dinner on T&E Card
- \$40 Local Establishment Gift Card
- Engraved Wooden Desk Nameplate

2

Silver

- Sales Support Olympics Silver Medal
- \$25 Lunch on T&E Card
- \$30 Local Establishment Gift Card
- Engraved Wooden Desk Nameplate

3

Bronze

- Sales Support Olympics Bronze Medal
- \$25 Lunch on T&E Card
- Engraved Wooden Desk Nameplate

Supporting. Most creative mad lib wins.



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