

# JULIA EVERITT

## MARKETING PORTFOLIO

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# M A R K E T I N G   C O N T E N T

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## Marketing Content

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Introducing Judge Hall E-blast -- Created for JAMS, page 13

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# BENEFIT//QUEST

## Business & Personal Insurance

### CROSS-SELLING

### BENEFIT QUEST

Insurance Agency



## USING AMS SHELLS FOR CROSS-SELLING

- Make sure you're looking at clients' AMS shell
- What business do they have with us?
- What business do they NOT have with us?
- Pay attention to client updates



## Example

If a new address added:  
Ask the customer if they need new personal lines, noting that moving is a big life-change that they might want to review insurance options.



- ✓ Have they had a life change?
- ✓ Account Rounding
- ✓ Communication
- ✓ Have they opened any recent emails about different insurance?

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you shoot a QR card and  
they can use it to access  
all of their images online  
and make purchases  
directly from there!



**LEARN MORE**





# EMPLOYER- SPONSORED RETIREMENT PLANS

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**BENEFIT//QUEST**  
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[www.benefitquest.com](http://www.benefitquest.com)  
[info@benefitquest.com](mailto:info@benefitquest.com)

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(212)-389-7828  
WWW.BENEFITQUEST.COM  
INFO@BENEFITQUEST.COM





# BENEFIT QUEST, INC.

## FIRM HISTORY

Mission Statement:

“Provide the best insurance and financial services available to our clients with maximum objectivity and customer service.”

**Eric Cohen**, Managing Director,

- Has been in the Property & Casualty Insurance and Benefits business for over 33 years
- Expertise: unparalleled; Integrity: unmatched
- Recognized by his peers for his dedication to his clients & commitment to the financial services industry
- Featured on Fox & Friends Live for expertise in the insurance and employee benefits field



**Phone: (212)-389-7939**

**Email: eric.cohen@benefitquest.com**

**Milind J. Shah**, CFP®, Insurance & Investments,

- Has over 22 years of hands-on experience in the financial services industry with an expertise in insurance and investments
- **CERTIFIED FINANCIAL PLANNER TM** certification recognize Milind as an expert in the financial services field



**Phone: (212)-389-7824**

**Email: milind.shah@benefitquest.com**

**Established  
in 2001**

in New York, New York

Eric and Milind are also Members of the **Million Dollar Round Table (MDRT)**.

MDRT is the Premier Association of Financial Professionals. It is an international, independent association of more than 31,000 members – less than 1 percent of the world's most successful insurance and financial services professionals – from 476 insurance companies in 80 nations and territories. MDRT members demonstrate exceptional professional knowledge, strict ethical conduct and outstanding client service. MDRT membership is recognized internationally as the standard of sales excellence in the insurance and financial services business.

# EMPLOYER-SPONSORED RETIREMENT PLANS

## Safe Harbor 401(K)

The Safe Harbor 401(k) is a popular retirement option for employers with 50 or fewer full-time employees and for those who are establishing start-up plans. The benefits to the employer include attracting and retaining qualified employees by offering a retirement plan. Another benefit is that they are exempt from certain annual administration that is necessary with Standard 401(k) plans. There are three Safe Harbor provisions that could benefit employees who contribute to the plan by having their contributions matched with employer dollars. Please see section on Safe Harbor 401(k) Plans below.

**Great for companies with 50 or fewer full-time employees**





# EMPLOYER- SPONSORED RETIREMENT PLANS

## Standard 401(k)

The standard 401(k) plan is more common for employers with more than 50 employees. In this type of plan the employer typically has an organized human resources department that works closely with a third-party administrator (TPA) to administer the plan. Most standard 401(k) plans offer a profit-sharing provision. This allows the employer to make additional contributions on behalf of the employees based on company profits. Plan assets typically exceed \$1,000,000.



**Popular choice  
for employers  
with more than  
50 employees**

# EMPLOYER- SPONSORED RETIREMENT PLANS

## **Simplified Employee Pension Individual Retirement Arrangement (SEP IRA)**

A SEP is a simplified employee pension plan. A SEP plan provides employers with a simplified method to make contributions toward their employees' retirement and, if self-employed, their own retirement. Contributions are made directly to an Individual Retirement Arrangement (IRA) or Annuity set up for each employee (a SEP-IRA. It is most appropriate for very small employers (usually 3 employees or less) and for owners who are usually related. It is easy to set up and administer. The annual contribution limits are lower than with other retirement plans.



**Best for employers with 3 employees or less**



# EMPLOYER- SPONSORED RETIREMENT PLANS

## KEOGH

Although small employers may establish this plan, it is most often established by the self-employed. It is more complex to maintain than any other type of plan described above due to its extensive annual administration. A Keogh plan may be established in one of three versions – Profit Sharing Keogh (most flexible), Money Purchase Keogh (most restrictive) or Paired Keogh (a combination of Profit Sharing and Money Purchase). Most Keogh plans incorporate permanent life insurance. This feature increases allowable annual contribution limits and maximizes business tax-deductions for both plan investments and life insurance premiums.

### Did you know?

Providing a 401(K) or retirement plan option improves employee morale by reducing financial stress.



**KEOGH: for the  
self-employed  
(and other small  
employers)**

# EMPLOYER-SPONSORED RETIREMENT PLANS

## Individual 401(k)

The Individual 401(k), also referred to as a Solo-401(k) or Individual(k), allows the self-employed person or sole-proprietor to establish a retirement plan with the same features as those of the 401(k) plans described above. These features include loan provisions; simplified administration and annual plan limits.

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### 401K Partners





# EMPLOYER- SPONSORED RETIREMENT PLANS

## Individual Retirement Arrangement (IRA) Account

Individual Retirement Arrangement (IRA) accounts are established by employees on their own to augment their retirement savings in one of two ways – Traditional or ROTH. In a Traditional IRA account, most investors are able to make annual tax-deductible contributions (within certain income limits) regardless of income. These contributions grow tax-deferred and are taxed at ordinary income tax rates upon distribution. Furthermore, at age 72 the account owner must start withdrawing funds from the account.

ROTH IRA accounts allow for after-tax contributions and although they grow tax-deferred, no income tax is levied upon distribution. Eligibility to contribute to a ROTH IRA is determined by IRS-imposed income limits. For 2022, income must be less than \$214,000 for Married Filing Jointly filers. For a Single/Head of Household it is \$204,000. The account owner can contribute to the account at any age.

For both types of IRA accounts, the annual limit is \$6,000 for 2022 with catch-up provisions of \$1,000 for those 50 years old or older.



**ROTH IRA accounts  
allow for after-tax  
contributions and  
grow tax-deferred**

# Welcome Hon. L. Priscilla Hall, (Ret.)!

TO OUR BEAUTIFUL COMMUNITY...

## Meet Judge Hall



Please help us welcome Hon. L. Priscilla Hall to JAMS panel of arbitrators/mediators!

A little about Judge Hall:

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- Her diverse career has spanned the fields of law, public service, and community service



Judge Hall at JAMS:

Based in the New York Resolution Center, Justice Hall will serve as an arbitrator, mediator, special master/referee, and facilitator, handling disputes in business and commercial, civil rights, mass torts, construction, education, employment, government and public agency, insurance, banking, personal injury and torts, real property, and securities. She is available to conduct sessions in person as well as virtually for attorneys and their clients across the country.

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# M A R K E T I N G   W R I T I N G

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## Marketing Writing   15-36

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## **A Jump Start into Your Happiness Journey: Quick Tips for First Steps Towards Lifelong Happiness**

So you want to improve your life? A great place to start is with your mindset. Your journey to a happier you can be a long process, but it doesn't have to be! With a few quick tips, you can start today on your path to a lifestyle of confidence, high-self-esteem, and... greater happiness!

### **1. Be open with your feelings**

Sharing your thoughts and especially talking about your feelings can improve your mood and help you stay in good mental health. Pushing past the initial awkwardness to open up a conversation about how you're feeling can seem daunting but a majority of psychologists agree that having these discussions and conversations about your feelings and emotions will lift your mood and raise your spirits.



### **2. Bring joy to others**

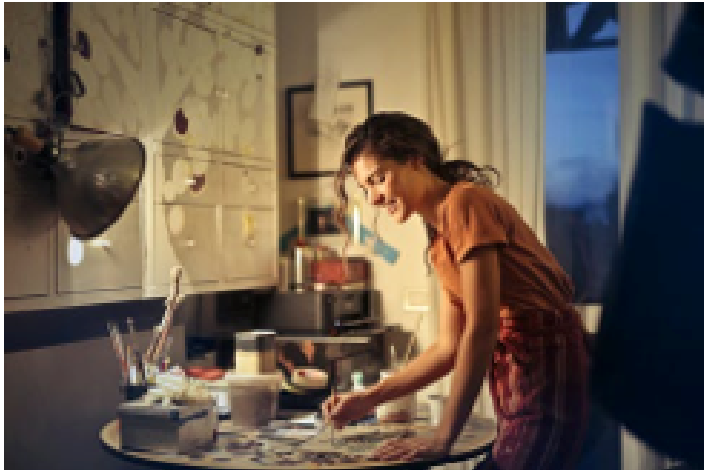
Helping others can be a great way to help yourself. Even small acts of kindness can be a good way to boost your spirits. A combination of scientific research and experiments have shown that altruism and acts of giving stimulate the areas of the brain that result in pleasure. So giving some of your time to a person, group, cause, or organization you care about can be a great way to embrace your own pursuit of happiness.





### 3. **Build new skills**

Challenge yourself by trying a new hobby or improving your skills and strengths at a current one. Activities that allow you to be creative, involve skill, and you enjoy doing are another great way to lift your mood and confidence levels. Hobbies can encompass a variety of activities from playing an instrument, to reading, to team sports, and more. Hobbies let you unwind from the stresses of your day-to-day and have been shown to improve your well-being.

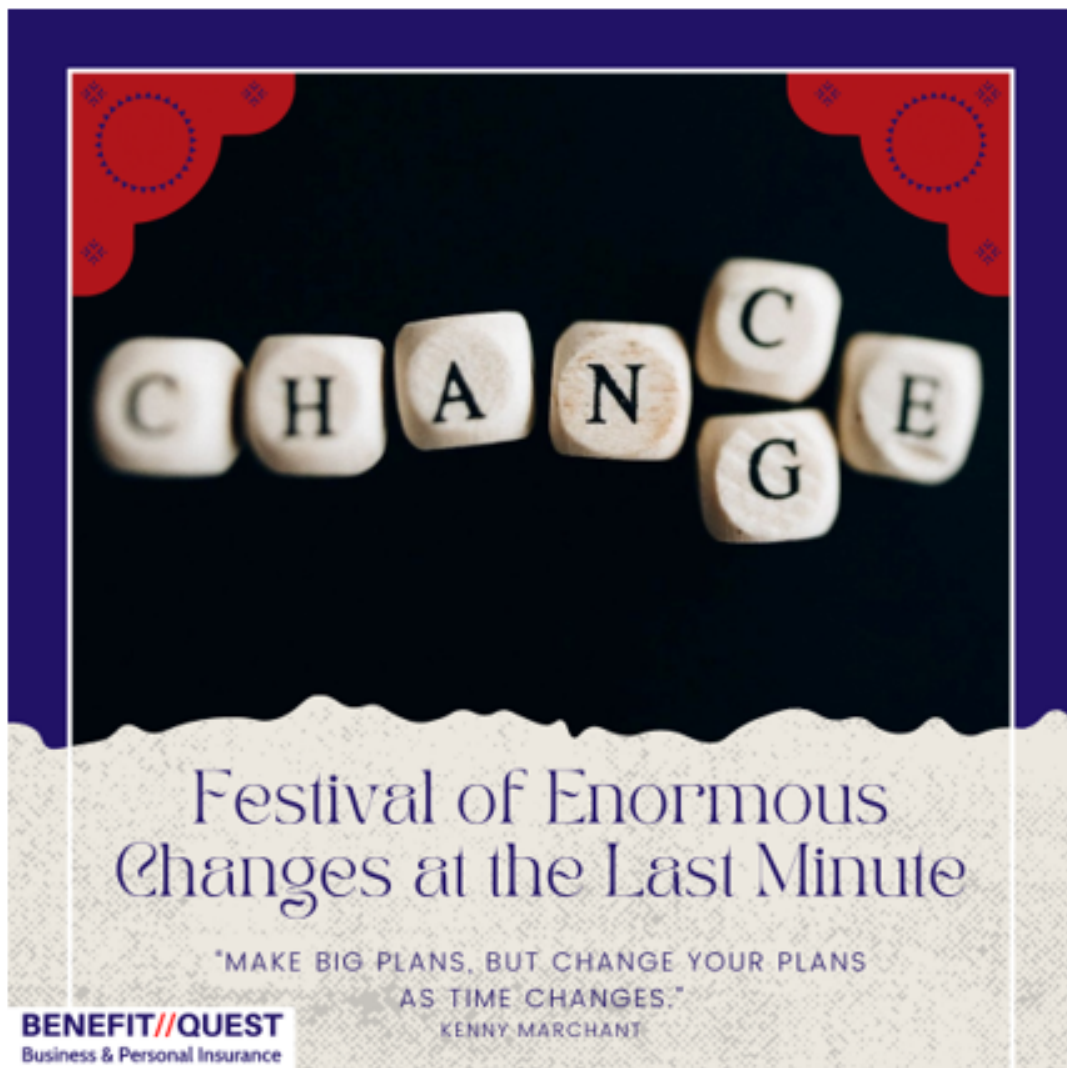


### 4. **Move your body!**

We've all heard it. Regular exercise generates endorphins for a natural feel-good buzz. Pop on your walking shoes or your personal favorite workout for thirty minutes a day at least three days a week to improve your emotional well-being. You don't have to have a crazy exercise routine to feel the effects, just have fun and get moving!



Next steps! Now that you've gotten started with some first steps towards a happier you, it's a great time to **reserve tickets to Coaching Season's Happiness Conference** for even more ways to cultivate happiness in your life.



If you don't like your current plan... make a new one. Today's holiday gives you the chance to switch things up– better late than never! And just before the new year starts!

And if you need to change up your insurance, we're here to help. We offer lots of insurance options, contact us and let us help you find great coverage– wouldn't that be a great change?

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**We are excited to offer a free webinar on what recruiters and hiring managers want to see when reviewing your resume.**

**The webinar will be an hour conversation with Target recruiter, Jenny Thompson, who has over 10 years of experience hiring qualified candidates in multiple fields.**

**You attend the webinar for free, live, on Saturday, September 24<sup>th</sup>, at 2pm, or sign up to receive the webinar recording if you can't make it on Saturday.**

**Here's the [link to sign up for the live webinar](#).  
And here is the [link to receive the webinar recording](#).**

**You may be able to ask a question at the live webinar!**

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## Customer Persona for hypothetical Monster.com Rebrand: Job-Hunt Jazzmine

Persona Name: Job-Hunt Jazzmine			
	<b>Biography</b> Jazzmine is a 22-year-old undergraduate student living in Boston, MA. She is a senior in college and will be graduating in a few weeks and has been looking for her first full-time job. She does not have much time to look between taking five classes, working as a part-time retail associate at a nearby clothing store, serving as the Vice President of her university's Elite Heat (competitive obstacle course) club, and participating as a member of the Biology Club.	<b>Lifestyle</b> (location type, cultural context, etc.)	<b>Occupation</b> (job, type of industry, etc.)
	She isn't committed to finding a job and living in a certain city after graduating, but would prefer to stay on the East Coast. She hopes to find a full-time position as soon as possible to avoid having to move back in to her parents' house, but the current job climate, as well as effects of COVID are making it exceedingly difficult for her to find anything in her field that she's qualified for that will interview her.	<ul style="list-style-type: none"> <li>Lives in Boston</li> <li>Fairly progressive ideology</li> <li>Active social life in a lot of on-campus activities</li> <li>Very limited free-time</li> </ul>	<ul style="list-style-type: none"> <li>Student</li> <li>Part-time retail associate at a clothing store (slightly over minimum wage)</li> </ul>
<b>Demographics</b> (life stage, socioeconomics, gender, relationship status, children, etc.)		<b>Goals and Joys</b> (personal, professional, or category-specific)	
<ul style="list-style-type: none"> <li>Gen Z (Age: 22)</li> <li>Not Married</li> <li>No children</li> <li>Senior in college, about to graduate with a B.S. in Biology</li> <li>Middle class background with some, but minimal student loan debt</li> </ul>		<ul style="list-style-type: none"> <li>Graduate from college</li> <li>Get a full-time job offer in a biology-related position</li> <li>Maintain an active social life (find a new obstacle course club in her new city post-college)</li> <li>Buy a house/condo by age 28</li> </ul>	
<b>Where and what do they consume?</b> (preferred stores, brands, companies, design styles, etc.)	<b>How do they consume?</b> (early adopter or laggard? (im)patient? price or quality? online or in-person?, etc.)	<b>Challenges and Frustrations</b> (personal, professional, or category-specific)	
<ul style="list-style-type: none"> <li>LinkedIn</li> <li>TikTok</li> <li>Amazon</li> <li>Apple</li> <li>Target</li> <li>Disney</li> <li>Shein</li> <li>Netflix</li> <li>Hulu</li> </ul>	<ul style="list-style-type: none"> <li>Early adopter</li> <li>Impatient</li> <li>Prefers budget-friendly options (price sensitive)</li> </ul>	<ul style="list-style-type: none"> <li>School is stressful and time-consuming, does not leave a lot of free-time to look for jobs</li> <li>Job hunt is not going well, has applied to over 100 jobs, only receiving two interviews, neither of which she was hired for</li> </ul>	

## Customer Persona for hypothetical streaming service "FXNow": Free-Time Frankie

Persona Name: Free-Time Frankie			
	<b>Biography</b> 20 year old Free-Time Frankie lives in East Lansing, Michigan.	<b>Lifestyle</b> (location type, cultural context, etc.)	<b>Occupation</b> (job, type of industry, etc.)
	She enjoys going to parties, procrastinating by streaming her favorite shows, and is in the alpine ski/snow board club at MSU.	She currently attends Michigan State University full-time where she is studying Business with a focus on Management. She works during her summer breaks, but not during the school year.	<ul style="list-style-type: none"> <li>Lives in East Lansing, MI</li> <li>Fairly progressive ideology</li> <li>Active social life</li> <li>Fair amount of free-time</li> </ul>
<b>Demographics</b> (life stage, socioeconomics, gender, relationship status, children, etc.)	She is currently living on student loan money so she is budget conscious but not worried about money.	<b>Goals and Joys</b> (personal, professional, or category-specific)	
<ul style="list-style-type: none"> <li>Gen Z (Age: 20)</li> <li>Not Married</li> <li>No children</li> <li>Current undergraduate college student</li> </ul>		<ul style="list-style-type: none"> <li>Graduate from college</li> <li>Land an awesome summer internship</li> <li>Have fun</li> <li>Build strong social bonds</li> </ul>	
<b>Where and what do they consume?</b> (preferred stores, brands, companies, design styles, etc.)	<b>How do they consume?</b> (early adopter or laggard? (im)patient? price or quality? online or in-person?, etc.)	<b>Challenges and Frustrations</b> (personal, professional, or category-specific)	
<ul style="list-style-type: none"> <li>Amazon</li> <li>Apple</li> <li>Target</li> <li>Disney</li> <li>Shein</li> <li>Netflix</li> <li>Hulu</li> <li>Kroger</li> </ul>	<ul style="list-style-type: none"> <li>Early adopter</li> <li>Prefers to shop online</li> <li>Prefers budget-friendly options</li> </ul>	<ul style="list-style-type: none"> <li>School is stressful</li> <li>Uncertainty about internships and future career options</li> </ul>	



## L'Oreal Case Study

**Situation Analysis:** L'Oreal is looking for room for growth in the at-home hair coloring market and has spotted three new hair dye styles through their research on celebrity styles and what is currently prevalent on social media. These three new styles are tie-dye, splat, and ombre hair. L'Oreal wants to determine which of these styles are quickly passing fads or longer-lasting trends in order to decide whether to create new products to cater towards these trends.

**Issue:** Should L'Oreal create new at-home hair dye products to cater to any of the new hair style trends: tie-dye, splat, and ombre?

**Strategic Alternatives:** One possible alternative for L'Oreal would be to create no new products to cater to any of the emerging three styles. With this choice, the risks to L'Oreal would be minimal, with no upfront costs to produce new products or expenses related to marketing the new products. With this option, however, there would be the risk that one of these trends does become a mainstay in the hair dye scene and that L'Oreal will have missed out on revenue from these products and/or come into the game too late, so that people have already grown attached to purchasing products for these styles from other brands.

Another possible alternative for L'Oreal would be to create three new hair dye products, one to create each new hair dye style. The risk with this is a large upfront cost for production and marketing these products with the potential for one, two, or all three styles to turn out to be a fad instead of a trend. While L'Oreal would be sure to have produced a product to fulfill any longer trend that these hair dye styles may become, if none of the trends continue to be in-style, the products may not make enough money to justify any up front costs.

A third alternative is to choose just one or two of the styles to create a new product for. For this there is less upfront cost of designing and marketing multiple products, but there is the possibility of jumping on the wrong style. If L'Oreal chooses only one style to create a product for, their new product will not be competing against their other new products and they will be able to put all of their marketing efforts into making sure the hair dye style they have created a product for is a more lasting trend.

**Recommendation and Rationale:** Before making a recommendation, we should address whether it is likely these new hair dye styles are trends or are fads. There are four key questions we can ask to help determine whether a style is a fad or a trend:

1. Is the item/style compatible with a change in consumer lifestyle?
2. Does the innovation provide real benefits?
3. Is the innovation compatible with other changes in the marketplace?
4. Who is adopting the trend?" (Dubois 4).

The first potential trend/fad is tie-dye hair. This style does not appear to be compatible with a change in consumer lifestyle, nor does the innovation provide real benefits. The innovation seems to follow other trends in the marketplace around generally more wild or less natural looking hair colors. The trend seems to be adopted primarily by celebrities and young people who are not yet in the workforce. The style is unlikely to be acceptable at many more

professional/corporate jobs. Given this information, I believe that tie-dye hair will turn out to be a fad.

The second potential trend/fad is splat. It seems to have most of the same answers to these key questions as the tie-dye hair dye style did. The style does not appear to be compatible with a change in consumer lifestyle, nor provides real benefits. The trend also seems to follow other trends with less natural looking hair colors. This style seems to be adopted primarily by celebrities and young people who are not yet in the workforce. The style is unlikely to be acceptable at many more professional/corporate jobs. Given this information, I believe that the splat hair dye style will turn out to be a fad.

The third potential trend/fad is ombre. This style does not appear to correlate with a change in consumer lifestyle or provide real benefits. This innovation is compatible with both trends towards unnaturally colored hair, as well as more natural colors. This trend is being widely adopted by celebrities, young people, and women. Given the broader adoption of this style, and that it is compatible with more lifestyles, I believe that ombre hair will turn out to be a trend.

In addition to using these four questions to determine whether these emerging styles are trends or fads, we can look at the loop strategy for guidance. The first step of the loop strategy would be to listen on social media to what consumers are interested in. The social media listening L'Oreal did for these trends garnered mixed results. Articles were being released that suggested ombre was going out of style in favor of the splat trend, while thousands of YouTube tutorials on getting the ombre style suggested that it was actually the most popular of the emerging styles. Given the practicality of the ombre trend over these other emerging styles, I find it likely the trend will stick around for longer.

My recommendation to L'Oreal relates to the second step of the loop strategy—to develop. I would recommend that L'Oreal manufactures a product for the ombre hair dye style only. Given the criteria from the four key questions, it seems the most likely to be a trend while the other two styles seem more like short-term fads. This hair dye style is the most wearable for an ordinary consumer. It can be subtle or bold which appeals to a variety of audiences. There is already an accessible product to recreate the splat hair dye style at home, but the ombre style offers the opportunity to be the first at-home product on the market.

Regardless of which style(s) L'Oreal ends up choosing to create a product for, the third step of the loop process comes into play next, promoting the product(s). I would recommend to them certain social media strategies to market their product. Even if the style they chose might have ended up as a “fad” L'Oreal does have some power to influence that. If the product they release is easy to use, works well, and looks good, they may have the ability to reignite the trend, if it had been losing interest partially due to inaccessibility. I would recommend that L'Oreal use influencer marketing for their products. If celebrities and style icons are posting on social media, continuing the trend then everyday consumers are more likely to continue the trend as well.

As the loop strategy circles back around, once they have developed and promoted their product, L'Oreal should continue to listen and look for customer feedback as well as feedback from the general public about adaptations on current trends or even newer emerging styles.

**KPIs and Expected Outcomes:** For key performance indicators we have many quantitative and a few semi-qualitative metrics to look at. On the quantitative side, we will know if the new ombre hair dye product is successful based off of sales numbers. If the product has sales numbers comparable to products in their existing *Casting Crème Gloss*, *Preference*, and *Excellence* product lines we will know the new product is successful.

Also on the quantitative side, if the revenue generated from the product is greater than the development costs, marketing costs, and variable costs, this is another key indicator of success for the new product.

Another indicator for us would be the longevity of the trend. If the trend lasts more than a year, L'Oreal can be confident it made the correct move in developing this product.

From a semi-qualitative, semi-quantitative perspective, if the product appears to be getting a lot of attention on social media and if the product/style has a renewed sense of interest in fashion articles and YouTube videos, these metrics on consumer/public response would indicate how successful the product is.

# *What if all workers wrote software, not just the geek elite?: Reaction*

Julia Everitt

No-coding solutions may seem like a dream, at first glance. They offer the ability to create apps without the need for complex technical skills or even any coding experience at all. While these no-code/low-code solutions might do in a pinch they are truly no replacement to custom software. The article itself even quickly admits one of the short comings of no-code options when describing a no-code app built by a field technician for Telstra, “the interface may look cluttered: the landing page jams in 150 buttons and a local-news ticker—the app equivalent of an airplane cockpit” (“What if all workers”). That is to say, while no-code apps may be functional, their appearance can be clunky and application-optimization is quite low.

Custom software is the better and often only true solution to many technological needs. With custom software you get a higher level of complexity. There are virtually no limits on features you can build, ensuring your software will easily integrate with any necessary third-party applications. In addition to these key integration components, the additional security and support options provided by custom software cannot be overlooked. The article points out that “[no-code/low-code solutions] could also become a headache for corporate IT departments if citizen developers collect customer data that are worthless or, worse, that violate privacy” (What if all workers). Application security is very important especially when dealing with financials or customer data. No-code solutions offer little to nothing in the way of security while custom software offers many options for ensuring sensitive information is kept safe. Another incredibly useful key feature that is not available in no-code apps is support options. When you build a no-code app yourself, you do not have anywhere to go for troubleshooting or inexplicable errors. When you work with a custom software solution, the entity who has built the software can help you if issues arise and have background to recommend and implement new features and additions to solve unanticipated pain points.

What the no-code proponents often overlook is the superior level of fit and finish offered by custom software. While no-code options are limited to pre-built options, as mentioned above, custom software can really be tailored to your needs. All aspects of your custom software can be coded to work seamlessly together and with the existing systems you have in place. The finishing and aesthetics of custom software surpass those of no-code options since templates offered on no-code platforms cannot account for all of your needs and require compromises to be made.

While we will likely see the no-code and low-code market space continue to grow, companies need to ask themselves whether they want to save a bit of time and money upfront building a stock-model application that will give them headaches later on with integration issues and potential for data breaches, or do they want to put all their worries aside and opt for an easy-to-use, designed-with-their-needs-in-mind, secure, custom software solution. There are many trade-offs between these two software options, but custom software reigns supreme in so many key areas, that no-code and low-code options are merely a cheap, substandard alternative to the true quality found in custom software solution.

# Understanding Tonal: The New In-Home Fitness System

**Author:** Julia Everitt

**Intended Audience:** Brand new Tonal users, potential Tonal users, or fitness personal trainers interested in learning about a potential competitor

**Date:** February 9<sup>th</sup>, 2020

## Tonal

### Intro

This report will cover the functions of the fitness system Tonal. This report is designed for brand new Tonal users, potential Tonal users, and personal trainers to learn more about what Tonal is and what its functions are.

Tonal is an in-home gym and personal trainer that goes on your wall. It has two arms that adjust three ways in order to replicate almost every machine or free weight you would use in a gym. The Tonal uses electromagnets to create up to 100 pounds of digital resistance per arm, for a total of 200 pounds of digital resistance.

### Workouts

Tonal has a variety of workouts and programs to meet users' strength training goals. Users follow along with a coach during workouts through several strength "blocks" (where a block is between two and four exercises that user will repeat between two and four times depending on the workout). Workouts are one-off individual workouts ranging from 15 minutes and up to an hour in duration. Programs are four-weeks long and either three times or four times a week; they are designed to meet a more long-term fitness goal. In addition to the over 100 programs and workouts currently available on Tonal, new content is added to the library every two weeks. No existing content is removed during these updates, only added.)

[https://www.whipsaw.com/wp-content/uploads/2019/11/Tonal\\_Main.jpg](https://www.whipsaw.com/wp-content/uploads/2019/11/Tonal_Main.jpg)

The image above displays Tonal in three different positions. The first is a Tonal that is turned off and entirely stowed away. The second is a Tonal with the bar attachment on with the screen in Free Lift Mode. The third is a Tonal with smart handles attached with the home screen displayed.

### Free Lift Mode

In addition to workout and programs led by coaches, Tonal also has Free Lift Mode. In Free Lift Mode, users can look through Tonal's entire library of movements to build their own workout, if they do not feel like following along with a coach that day, or want to complete additional exercises not in their scheduled workout. In addition to Free Lift Mode on the Tonal itself, a user can build their own

workout using the Tonal app that will sync automatically to their Tonal account so they can easily pull up the workout they built on screen.

### **Smart Accessories**

The Tonal has a Smart Accessories package available for purchase that is recommended for best use of the Tonal system. The package includes smart handles (image A), a smart bar attachment (image B), a rope attachment (image C), a roller (image D), bench (image E), and workout mat (image F). The two smart handles attach to each arm of the Tonal quickly and easily using “t-locks” where you simply insert and twist the handle to attach. The handles, rope, and bar all attach using these t-locks. The smart handles allow you to turn on and off the resistance (weight) simply by pressing a button on the side of the handle (where both handles have these buttons, but you only need to press one side to toggle the weight on and off). The smart handles also have a gyroscope inside of them which allows Tonal to better evaluate the quality of your reps. The smart bar similarly toggles the weight on and off in the same manner, by simply pressing a button that is clipped to the smart bar; the clip is removable and can slide along the bar, so users can place it where it is not in the way of their hands while exercising. The rope attachment only attaches to one arm of the Tonal and does not have any of the smart features, but simply caters better towards certain movements than the other attachments; movements including, but not limited to chops, bicep curls, and pull-throughs. The roller can be used for active recovery exercises as well as stretching. The bench allows for a greater number of movements in your workout including popular exercises such as bench presses and chest presses. The final item in the Smart Accessories package is the workout mat; the workout mat provides cushion and support for any exercises on the floor including warm up exercises, active recovery, cool downs, etc.

### **Customized Strength Training**

When a user is first setting up their Tonal, they create an account where they select their current fitness level, as well as choosing two fitness goals from a selection of six goals: building muscle, improving performance, gaining strength, maintaining fitness, getting lean, and boosting energy. From the goals the user provides, as well as their current fitness level, Tonal will recommend specific programs to users to meet those goals. Users can choose whether or not they would like to complete those recommended programs, or join any of the other programs in the library, or complete individual workouts.

### **Strength Assessment**

After a user puts their goals into the Tonal, they will be asked to complete “your first tonal workout” which is a strength assessment, used to calibrate recommended starting weights for every exercise in the system. The system also grows with the user. When a user goes through a set of reps quickly and without struggling, the Tonal will increase the recommended amount of weight for that movement the next time the user encounters the movement. For example, if a user completes a set of 8 reps of goblet squats quickly while maintaining their range of motion at 28 pounds, the next time the user does a set of goblet squats, the recommended weight for the movement will be 29 pounds.



## User Interface

Tonal has a touch screen, so users can scroll through the library of workouts and programs on the screen, as well as adjust the digital resistance and toggle the weight on and off on screen. The homepage of Tonal displays recommended programs first, followed by the newest workouts, and then a selection of other workouts. From the home screen, the users can select a function to search for specific workouts or programs based on factors like the length of time the workout takes, which coach is leading the workout, what muscles the workout uses, and what level the workout is (beginner, intermediate, or advanced).

## Advanced Features

Tonal has several other advanced features. One is a spotter mode. Spotter mode functions as a replacement for having a friend spot for you in the gym, on Tonal, if Tonal feels you struggling on a rep (i.e. you take too long to complete the rep) it will decrease the resistance for you on just that rep so you can complete your workout. Another advanced feature is burnout mode. Burnout mode reduces the weight one pound at a time until you complete your last successful rep. The other two advanced weight features are chains and eccentric. Chains mode simulates how one would lift with chains in a gym by increasing the resistance on the outset of a movement and decreasing it back to the set weight on the decline. Eccentric is similar to chains, except in eccentric mode the weight is the set weight on the outset and then increases on the decline. These two advanced weight modes are designed to increase the amount of time the muscle is under tension in order to build muscle at a quicker rate.

## Sound on Tonal

Sound on Tonal can either be played out loud through built-in speakers, like a television, or can be paired with any wireless Bluetooth headphones or earbuds. Tonal has a selection of different music playlists that you can choose to listen to while you are working out. There is a volume control that allows you to increase or decrease the volume of the coach, music, and sound effects independent of one another to suit your preferences.

## Future Advancements

Tonal's hardware has been "future-proofed" for further advancements, with a currently non-functional built-in camera, so potential customers do not have to worry about buying an obsolete model; all updates will be on the software.

## Summary/Conclusion

Overall, Tonal combines digital resistance with the expertise of fitness coaches to create a system where users are able to complete workouts and meet strength training goals. Tonal has smart accessories that attach to the hardware's two arms to help Tonal to replicate more of the machines and free weights available in regular gyms. Tonal keeps track of how much weight a user should be lifting for each movement in the system, and provides weight recommendations to users. Tonal

provides several features in addition to its main functions as a personal trainer and in-home gym for user's ease of use and enjoyment, such as ability to search for specific workouts, and options to listen to music.

### **Works Consulted**

The World's Most Intelligent Home Gym and Personal Trainer. (n.d.). Retrieved February 7, 2020, from <https://www.tonal.com/>

Tonal Strength Training System - Whipsaw Industrial Design & Engineering. (n.d.). Retrieved February 7, 2020, from <https://www.whipsaw.com/project/tonal-strength-training-system/>



# COACHING SEASON

*Cultivate a life well lived*

## Video Planner

<b>Where will this video be published?</b>	<b>What audience persona will your video target?</b>
<ul style="list-style-type: none"><li>• Facebook</li><li>• Instagram Stories</li><li>• Twitter</li><li>• <del>TikTok</del></li><li>• Other: _____</li></ul>	<ul style="list-style-type: none"><li>• Joe Curious</li><li>• <del>Sally Sue</del></li><li>• Alex Value</li><li>• Scott Michael</li><li>• Other: _____</li></ul>

<b>Video Title:</b>	Number 7
<b>Video Pitch:</b>	Use "original sound- <del>lexibluepoo</del> " where the cashier is mishearing the customer. Person is lip syncing with audio, on screen " 7: A life coach and a path towards my goals 11: Continue to struggle with work-life balance at my 9-5 job."
<b>Video Caption:</b>	Which one are you trying to order?

<b>Name of team member:</b>	<b>Role (writer, videographer, protagonist etc.):</b>
Any team member	All roles

<b>Publish Date:</b>	July 12	<b>Reason Selected:</b>	Want to wait until a workday to publish.
<b>Publish Weekday:</b>	Monday	<b>Reason Selected:</b>	People tend to be most disillusioned with their jobs and work on Mondays.
<b>Publish Time (EST):</b>	11am	<b>Reason Selected:</b>	Will capture people during their lunch break.

<b>Identify the TikTok/video trend, within your video:</b>	Mishearing a customer. The trend is the sound.
<b>Link to music:</b>	No music-- the sound from this video, available in the app: <a href="https://www.tiktok.com/@lexibluepoo/video/6972173275744996614?lang=en&amp;is_copy_url=1&amp;is_from_webapp=v1">https://www.tiktok.com/@lexibluepoo/video/6972173275744996614?lang=en&amp;is_copy_url=1&amp;is_from_webapp=v1</a>
<b>List of props:</b>	No props.

	<b>Hashtag</b>	<b>Reason this # was selected?</b>	<b>Hashtag Popularity</b>
<b>1</b>	#lifecoach	Relevant to subject matter	564.2M
<b>2</b>	#jobburnout	Relevant to subject matter	116.4K
<b>3</b>	#selfimprovement	Relevant to target audience.	5.7B
<b>4</b>	#wellnesstiktok	Relevant to target audience.	16.6M
<b>5</b>	#worklifebalance	Relevant to target audience.	65.1M
<b>6</b>	#goalsetting	Relevant to subject matter.	83.2M



7	#personalcoach	Relevant to brand.	3.9M
8	#lifecoaching	Relevant to brand.	92.8M
<b>Resources used to research hashtags:</b>		TikTok	

## Script

	Audio	Visual	Duration
1	" <u>original sound-lexibluepoo</u> "	Person <u>lipsyncing</u> to audio asking for the number 7. In text on screen: "7: A life coach and a path towards my goals 11: Continue to struggle with work-life balance at my 9-5 job."	0:15
<b>Total Duration:</b>			0:15



# COACHING SEASON

*Cultivate a life well lived*

## Video Planner

<b>Where will this video be published?</b>	<b>What audience persona will your video target?</b>
<ul style="list-style-type: none"><li>• Facebook</li><li>• Instagram Stories</li><li>• Twitter</li><li>• <del>TikTok</del></li><li>• Other: _____</li></ul>	<ul style="list-style-type: none"><li>• <del>Joe Curious</del></li><li>• <del>Sally Sue</del></li><li>• <del>Alex Value</del></li><li>• Scott Michael</li><li>• Other: _____</li></ul>

<b>Video Title:</b>	Put a finger down
<b>Video Pitch:</b>	A put a finger down challenge for common reasons someone would want a life coach.
<b>Video Caption:</b>	Another put a finger down challenge!

<b>Name of team member:</b>	<b>Role (writer, videographer, protagonist etc.):</b>
Anyone	



<b>Publish Date:</b>	7/28/21	<b>Reason Selected:</b>	Gives a reasonable amount of time to create the video to publish on a Wednesday.
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<b>Publish Weekday:</b>	Wednesday	<b>Reason Selected:</b>	One of the best days to post a TikTok for number of views.
<b>Publish Time (EST):</b>	8am	<b>Reason Selected:</b>	One of the best times to post a TikTok for number of views.

<b>Identify the TikTok/video trend or type of content, within your video:</b>	Put-a-finger-down challenge.
<b>Link to music:</b>	n/a
<b>List of props:</b>	n/a

	<b>Hashtag</b>	<b>Reason this # was selected?</b>	<b>Hashtag Popularity</b>
<b>1</b>	lifecoach	Relevant to brand.	575.4M
<b>2</b>	lifecoaching	Relevant to brand.	86.3M
<b>3</b>	worklifebalance	Relevant to video content.	51.6M
<b>4</b>	putafingerdown	Relevant trend.	3.5B
<b>5</b>	putafingerdownchallenge	Relevant trend.	348.4M
<b>6</b>	putafingerdownif	Relevant trend.	8.4M
<b>7</b>	putyourfingerdown	Relevant trend.	848.5M
<b>8</b>	putyourfingerdownchallenge	Relevant trend.	17.5M

# Script

	<b>Audio</b>	<b>Visual</b>	<b>Duration</b>
1	<p>Okay, put a finger down challenge, but I'll only tell you what it's for at the end.</p> <p>Put a finger down if you lost your job during the pandemic and haven't been able to find a new one. Put a finger down if you have a 9-5 job, but it's not what you want to be doing and makes you exhausted. Put a finger down if you feel like you need to "get your life together." Put a finger down if you have big goals but feel like you really need someone else to help hold you accountable for making progress towards those goals. And put a finger down if you think "work-life balance" is actually a myth. Okay, so if you put ANY fingers down, even just one, sounds like you could maybe use a life coach. Click the username to find out about Coaching Season.</p>	<p>Person holds up hand with five fingers, and puts down a finger with each "put a finger down." Person does air quotes for each set of quotes in script.</p>	0:00-1:10
<b>Total Duration:</b>			1:10



S O C I A L M E D I A  
M A R K E T I N G

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## Social Media Marketing 37-56

Social Media Graphics -- Created for Heidi Marshall Studio, page 38

Social Media Analytics Case Study— Created for Heidi Marshall Studio, Pages 39-45

Social Media and SEO Proposal Deck-- Created for Multimedia Solutions, Pages 46-56

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## HOW TO BOOK & SURVIVE A CO-STAR with Athena Colón

Monday, Oct 10th  
6-9pm

Athena is back to help you demystify co-star roles and prepare the "under-5" audition

## UPCOMING CLASSES

FILM/TV ACTING & AUDITIONING: PART 1 WITH HEIDI

FILM/TV ACTING & AUDITIONING: PART 2 WITH HEIDI

GENRE, TONE & STYLE: DELIVERING NUANCED AUDITIONS WITH HEIDI

PLAYING TEENAGE ROLES WITH ATHENA COLÓN

HEIDI MARSHALL STUDIO



## Film/TV Acting & Auditioning with Heidi

Part 1 : TUESDAYS September 6, 13, 20, 27  
OR 11:00am-3:00pm EST  
6:00pm-10:00pm EST

NEW SECTION ADDED!

## PART 1: FILM/TV ACTING & AUDITIONING WITH HEIDI

November 10, 17  
December 1, 8



## Thursdays in November!

6-10pm EST

Collective

Self-Tape

Coaching

Alumni

Classes

# Heidi Marshall Studio

Julia Everitt

Social Media Case Study: Analytics & Content Examples

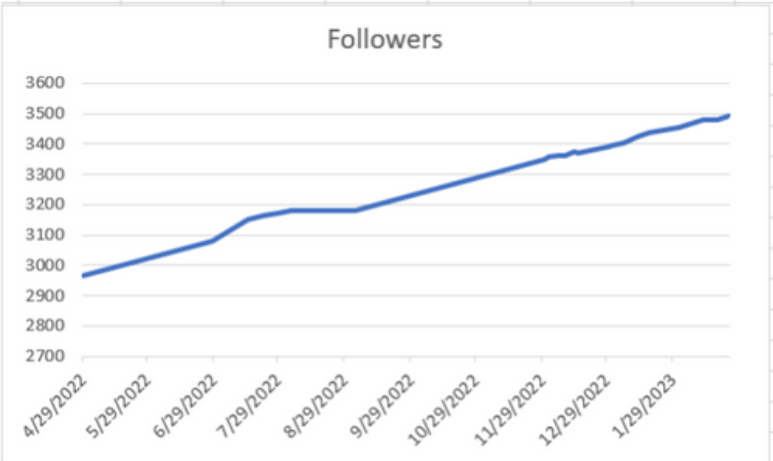
## Instagram

### Followers

Number of followers: 3,490  
Following: 3,742  
New followers gained in December: 43  
New followers gained in January: 60

### 6 months Ago: August 24th, 2023

Number of followers: 3,181  
Increase in followers: 252  
9.71% Increase



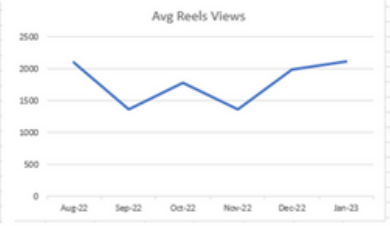
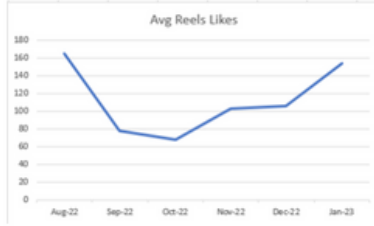
# Instagram

## Likes/ Reach for Image Posts

Average likes per post (over 2022): 58  
Average reach per post (over 2022): 834  
Average likes per post (over last 6 months): 79  
Average reach per post (over last 6 months): 999

## Likes/ Reach for Reels

Average likes per reel (over last 6 months): 103  
Average reach per reel (over last 6 months): 1673



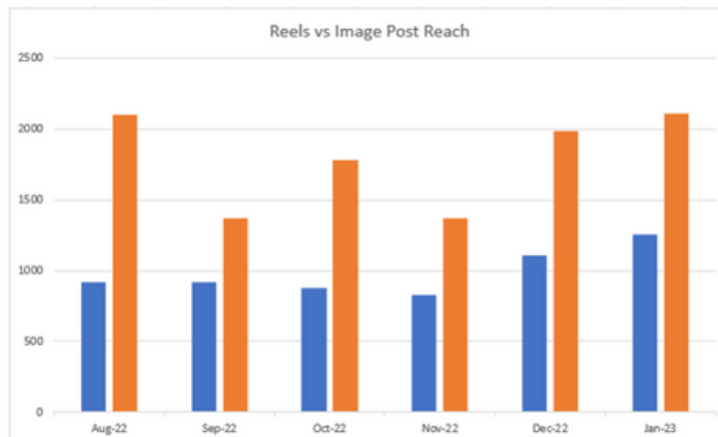
Overview: Big Picture

# Instagram

## Reels vs Image Post Reach

Average reach per image post (over last 6 months): 999

Average reach per reel (over last 6 months): 1673



Blue: Image Posts Average Reach

Orange; Reels Average Reach

Overview: Big Picture





heidmarshallstudio • Follow  
New York, New York

heidmarshallstudio Find your own way into the role.

That's central to my philosophy as a private acting coaching.

Working on film requires honesty in every moment. I work to unearth the nuances in the text by noting your instincts and giving insight into the possible range of text interpretation. My casting director experience and director's eye are keenly aware of truth, text analysis, and what works on camera.

I'm positive that the deeper you go in your work, the more irresistible you become. I believe that any audition frustrations can be traced back to how you prepared. Building audition and on-set confidence through preparation is crucial.

Link in bio to schedule a coaching with me or my handpicked team of coaches! We can support you with self-tapes, audition prep, and performance prep for upcoming productions. Film, TV, Theater—yep, we do it all!

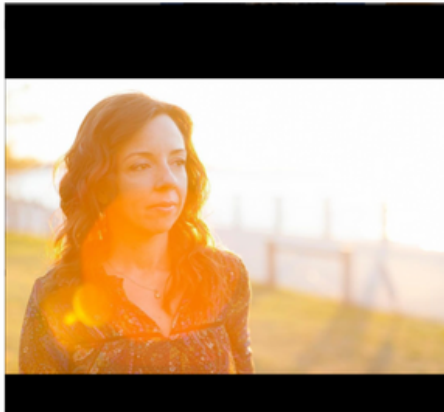
193 likes  
DECEMBER 16, 2022

Add a comment... Post

Reach: 1806

Likes: 196

Image: Both of these top performing images featured a photo of Heidi



heidmarshallstudio • Follow  
Manhattan, New York

heidmarshallstudio DEAR TALENTED ACTORS,

I look for windows of opportunity between my directing gigs to teach my Film/TV Acting & Auditioning Part 1 class. I always get inspiration and rejuvenation when working with talent on camera.

Are you seeking some rejuvenation as an actor?

Are your self-tapes wearing you out, getting you out of touch with your process, keeping you running full speed ahead without any pause and reflection?

My classes are small + private, and a wonderful place for an actor to explore and grow.

My classes have always beautifully grown from word-of-mouth by thousands of alumni students (I've lost count). I always believe that the artists that walk into my studio are the artists I am meant to work with. I felt like that as a casting director too—I am meant to meet this actor. Somehow, it all aligns and makes

193 likes  
SEPTEMBER 25, 2022

Liked by ill\_think\_of\_something\_witty and 173 others

Reach: 1610

Likes: 174

Text: Both captions imparted personal wisdom gained from experience in the industry.

### Top Performing Posts



Reach: 1751

Likes: 50

Image: Features Heidi with graphics

Other: Collaboration with another account

### Top Performing Posts



heidmarshallstudio 4w  
 Looking ahead at what's happening in the Acting Collective!

Upcoming guests for Full Access members include:

- 🌟 Guy Lockard @guylockard  
 Actor | CHICAGO MED, CHICAGO PD, GOD FRIENDED ME, FBI, THE VILLAGE
- 🌟 Erica Hart, CSA @elove67  
 Hart Casting | THE SURROGATE, THAT DAMN MICHAEL CHE, JODIE, B'way: CHICKEN AND BISCUITS, PASS OVER
- 🌟 Athena Colón @athena\_nyc  
 Actor & Coach | THE GIRL ON THE BUS, NEW AMSTERDAM, BULL, VINYL, JESSICA JONES, L&O: SVU

Get to know these talented artists and creatives in an intimate, supportive environment. Masterclasses and resident teaching artist series include individualized coaching, peer exchange, intimate discussions, anecdotes, and career tips.

Link in bio to choose Full Access to the Acting Collective!

P.S. Did you know @athena\_nyc runs a workshop in the collective every month? 🔥

Reach: 1586

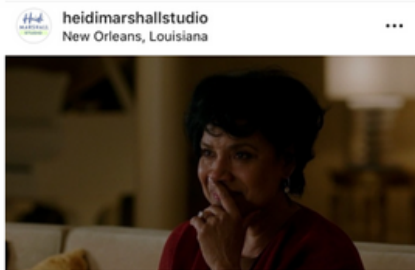
Likes: 96

Images: Carousel post featuring three upcoming guests

Text: Who will be upcoming guests for the Acting Collective.

Posts that reference guests, community members, etc. may perform better since they may be reshared by those tagged.

## Top Performing Posts



heidmarshallstudio  
 New Orleans, Louisiana

As a Director, what I'm looking for in an actor, what I need to see in the audition process, is different than what I look for from you when I'm coaching you. 🔍

As your Coach, I look for how to support you to get there and help you make your discoveries, how to work with the camera, how to bring your unique self into the role, how to make choices stronger. And more....

But when I'm directing, I need you to get there ALL on your own.

A director needs:

- 🌟 an actor who can deliver on the spot.
- 🌟 an actor who can deliver it again, and again.
- 🌟 an actor who makes choices on their own.
- 🌟 an actor who can discuss the choices.
- 🌟 an actor who confidently navigates the scene.
- 🌟 an actor who goes deeper every single take, or every callback.

Directors need actors who are ready to handle being on set.

You can count on the Director being uber busy on set and not having time to also be your acting coach. (And I won't be with you on all your gigs!) 😊

There are so many factors on set that will cause stress and chaos. So, the team really needs actors who can deliver independent of what the director is giving, or not giving.

We don't take these casting decisions lightly at all.

We need to feel confident you can make it happen on the day of filming. So much is riding on the actor's performance being delivered!

This is precisely why you need to have many Tools in your arsenal that you can reach for to deliver on the spot. You need to feel confident that you will be able to get there on your own. 🙌

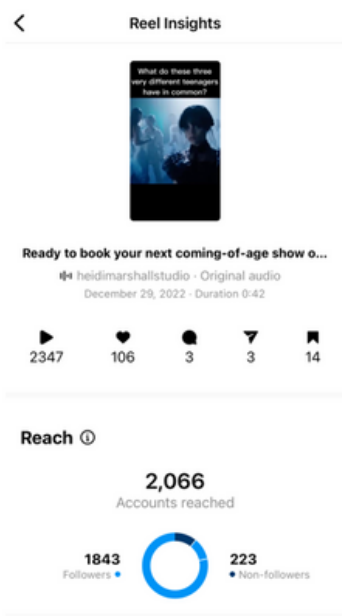
Reach: 1646

Likes: 119

Image: Screengrab from a movie/TV show

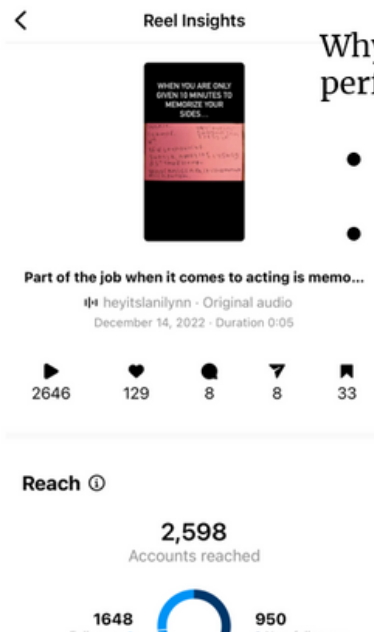
Text: Acting tip.

## Top Performing Posts



Why might this reel have performed well?

- Offers constructive advice



Why might this reel have performed well?

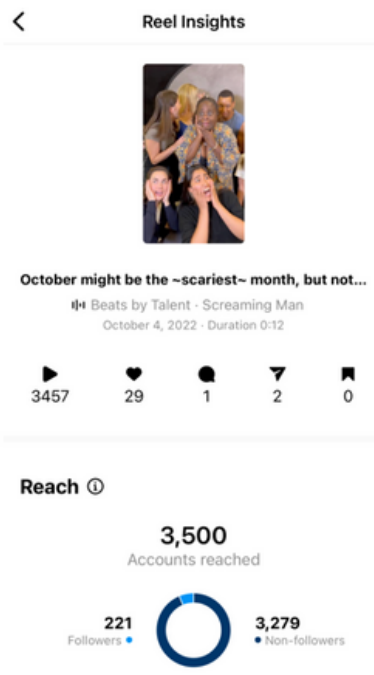
- Offers constructive advice
- Uses trending sound

Top Reels



Why might this reel have performed well?

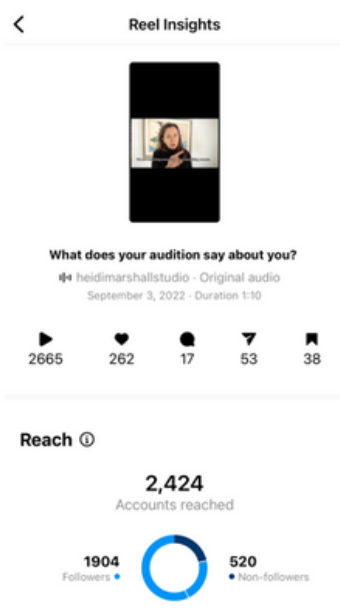
- Offers advice
- Short: 7 seconds



Why might this reel have performed well?

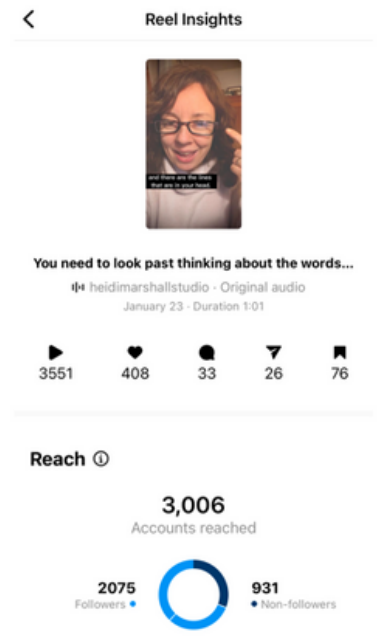
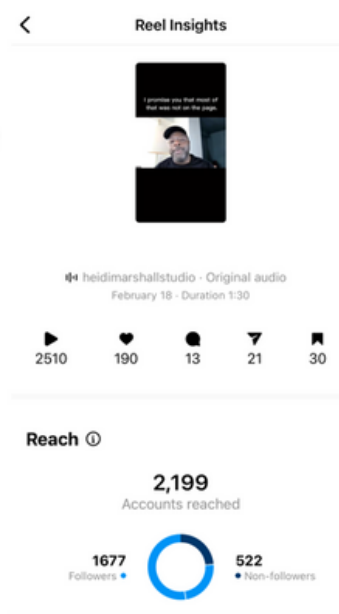
- Uses trending sound
- Short: 12 seconds

Top Reels



Why might these reels have performed well?

- Offers constructive advice



## Top Reels

- Posts & reels featuring Heidi perform well
- Collaborations (such as the podcast contribution) could be a good way to gain reach, especially for new audiences
- Reels are showing higher reach than feed posts – recommend continue posting reels
- Reels that include clips from online classes perform well
- Reels with no acting advice/tips, or where the advice is in the caption don't perform as well
- The feed posts with a long caption with actionable advice are still performing well
- Add engagement to the social media strategy
  - Commenting, liking, and following either leaders/competitors within the niche or prospective customers
  - Usually recommended to like & engage with others' posts 15mins before & after posting

## Recommendations

# TikTok

## Followers

Number of followers: 28

Following: 34

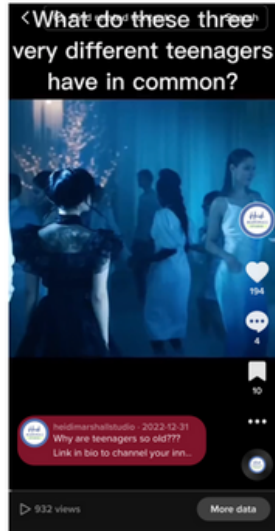
## Top TikTok Post

Views: 932

Likes: 194

Comments: 4

Shares: 10



Date	Views	Likes	Comments	Saves
11/7/2022	873	16	6	1
11/9/2022	282	10	3	1
11/11/2022	489	33	0	3
11/16/2022	262	31	3	1
11/28/2022	261	29	0	0
11/30/2022	279	44	2	4
12/5/2022	107	16	0	2
12/14/2022	329	31	0	3
12/21/2022	286	11	2	1
12/31/2022	932	194	4	10
1/14/2023	866	19	2	1
1/18/2023	165	10	0	1
1/23/2023	266	19	6	2
2/2/2023	894	8	0	1
2/17/2023	922	11	1	0
2/24/2023	130	4	0	0
2/27/2023	359	9	0	0
3/1/2023	236	8	2	1

## Stats

# TikTok

- Hashtags relating to pop culture topics may perform better
- Reach may be limited since business accounts on TikTok cannot use many trending songs/sounds
- Content has been optimized for IG Reels and not TikTok – could negatively affect performance
- Videos speaking to the camera tend to perform well on TikTok

## Recommendations



# Riker Danzig LLP

July 2023

Riker Danzig

Agenda

## Agenda

- 6-Month SEO Roadmap
- Initial SEO Recommendations: Content
- Initial SEO Recommendations: Technical
- Website Optimization Recommendations
- Social Media Strategy & Set-up
- August Social Media Content

# 6-Month SEO Roadmap

Riker Danzig

SEO

Month 1	Month 2	Month 3	Month 4	Month 5	Month 6
Audit & analyze existing site performance	Existing Content Review	Optimize Existing Content	Audit & Optimize Site Links	Additional Keyword Research	Additional Keyword Research
Keyword Research	New Content Ideation	Publish Copywriting from Month 2	Additional On-Page SEO	Outreach for Backlinks	New Content Ideation
Market Research	Keyword Integration	Additional Copywriting	Content Creation & Copywriting	Content Creation & Copywriting	Content Creation & Copywriting
SWOT Analysis	Develop Content Plan	Outreach for Backlinks			Outreach for Backlinks
Comps Research, Review, & Comparison	Begin Copywriting				
Technical SEO Audit	Backlink Audit				
	Optimize Title Tags, Meta Descriptions, Internal Links, Etc.				

Riker Danzig

SEO

## SEO Deliverables

- Monthly Web Traffic Reports
  - Includes performance of new content pages, bounce rates, etc.
- Monthly Crawl Stats Reports
- Blog post reviews
- Blog post suggestions
- Monthly report of updates made
- Monthly report of suggestions for optimization

# Initial SEO Recommendations: Content

- Blog Posts
  - Write plainly for the everyman
  - Create a glossary of key terms
- Keywords to integrate into content
  - Morristown
  - Litigation
  - Insurance
- Content Ideas
  - How to File for Bankruptcy Without a Lawyer (and Why It Would Be Better to Have One)
  - Paralegals Function in a Law Firm
  - What To Know About AI and The Law

# Initial SEO Recommendations: Technical

- Start: Technical SEO audit
  - Preferred domain audit
  - Audit 301 redirects
- Compress website files to improve page load speed
- Submit up-to-date XML sitemap to Google Search Console & Bing Webmaster Tools
- Remove outdated content from the website (improves crawlability for search engines to index the site)
- Review crawl stats regularly
  - Set-up Google Crawl Stats Report
- Add breadcrumb menus

# Website Optimization Recommendations

- Add clickable “contact” button above the fold
- Optimize homepage so visitors can see what type of business Riker Danzig is within 15 seconds of landing on the page
- List of attorneys rather than searching for attorneys
  - Are you speaking to existing clients or potential clients?
    - Key- speak to both
- Restructure or remove “Events” page

# Social Media Strategy & Set-Up

Posting frequency:

Two posts a week on Instagram & LinkedIn

Post on same days- Mondays & Wednesdays

Ideally share stories on Instagram on days with no posts.

Ideally share/ repost with comment for LinkedIn on days with no posts.

Stories could include sharing blog posts shared to the website, breaking news relevant to the legal industry or firm’s clients, resharing content from firm’s clients & employees, and sharing firm news that may not justify its own feed post.

LinkedIn content to share would include sharing blog posts shared to the website, posts from firm’s employees, legal news, and thought leadership pieces pertaining relevant to the firm’s areas of practice.

Material on Instagram and LinkedIn will be on the same subject matter, but may be optimized for each platform.

LinkedIn®



# Social Media Strategy & Set-Up Continued

Mix of posts, articles, carousel, stories, and reels/short form video.

Add story highlights: Legal news, sharing client wins, FAQ, employee

Content Pillars:

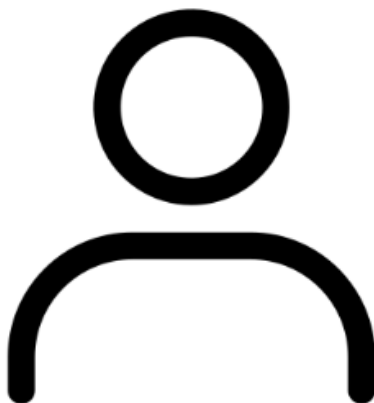
- Legal Tips
  - Defining “Legalese”
  - When to Hire a Lawyer
  - Myth Busting
  - Brief Chat with a Lawyer
- About the Firm
  - Firm news & updates
  - Meet the Riker Danzig team
- Legal news
  - Relevant new laws passed
  - Court cases establishing a precedent



**LinkedIn**

# Social Media Strategy & Set-Up Continued

## Who to Follow



Who to Follow:

- Competitor Firms
  - Pardalis & Nohavicka: @pnlawyers
  - Pitcoff Law Group: @pitcofflawgroup
  - Lesch and Lesch: @leschandlesch
- Target Clientele/ Existing Clients
  - Wells Fargo
  - Bank of America
  - Wayne Surgical Center
  - Business Owners
  - Real Estate Agents



# Social Media Strategy: Engagement

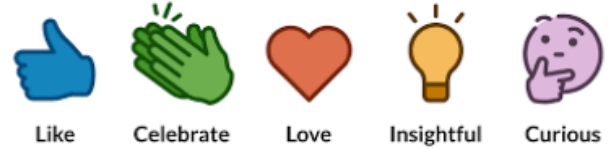
Riker Danzig

Social

Engage with accounts you are following, target clients, accounts in target industries (both individuals & businesses), legal industry thought leaders, and those who you see engaging with competitor law firms' content.



Engaging can include:



- Liking posts
- Commenting on posts
- Sharing posts (with or without additional commentary)
- Replying to comments on our posts
- Responding to messages sent to the accounts

## Social Media Content Calendar

2023  
**AUGUST**

SUN	MON	TUE	WED	THU	FRI	SAT
		1	2 3 TIMES TO HIRE A LAWYER	3	4	5
6	7 DEFINING LEGAL TERMS: BANKRUPTCY LITIGATION	8	9 INTRODUCING THE TEAM: RIKER DANZIG	10	11	12
13	14 MYTH BUSTING: CYBER SECURITY	15	16 PLACEHOLDER: CLIENT WIN/ CASE SETTLED	17	18	19
20	21 BRIEF CHAT WITH A LAWYER: ESTATE PLANNING	22	23 PLACEHOLDER: CLIENT WIN/ TESTIMONIAL	24	25	26
27	28	29	30	31		

# August 2nd

Riker Danzig

Social

## LinkedIn Post & IG Carousel 3 Times to Hire a Lawyer (when you think you might not need one!)

Sometimes it can be pretty obvious when to hire a lawyer. Other times... not so much. Here are 3 times you should hire a lawyer that you might not have thought of:

1. When starting a business. You might think you can just fill out some paperwork and start your LLC, but you could very quickly end up in hot water for not following legal procedures when raising capital, incorrectly assessing your tax liability, or any other number of things. Laws for businesses can be complicated and having a lawyer on your side from the start could save you time, money, and headaches in the long run.
2. The other party has hired an attorney. Even if it was initially a matter that you thought you could handle without getting the courts involved, if the other party has "lawyered up," it is definitely time for you to find representation too.
3. You are presented with a contract. An attorney can help clarify the contract's terms, help you to negotiate more favorable terms, and avoid any traps that may be hidden in the contract's legalese.

Not sure if you need to hire a lawyer? Use the link in our bio to contact us, and we'll see how we can help you.

#lawfirm #businessowner #legaladvice #legaltips #njlawfirm #nycclawfirm #njattorney #nycattorney #njlawyer #nycclawyer #attorney #lawyerlife #smallbusiness #lawsuit #lawyer #njrealestate #nycrealestate #morristown #legaladvocate #lawfirms #lawyersofinstagram #startup #law #legal #lawyertalk #attorneylife #attorneysofinstagram #llc #llcfinder #smallbusinessowner

\*\*Attorney advertising. Past results do not guarantee the same results to future clients.

# August 2nd

Riker Danzig

Social

## LinkedIn Post & IG Carousel 3 Times to Hire a Lawyer (when you think you might not need one!)



**LinkedIn Article and IG Reel  
Defining Legal Terms: Bankruptcy  
Litigation**

# August 7th

Riker Danzig

Social

Reel Script: How to speak “legalese” lesson 1: What is Bankruptcy Litigation?

Declaring bankruptcy is a legal process where a person or business can file paperwork in order to have their outstanding debts forgiven. While a majority of the time, this process doesn’t involve a dispute with a second party, any person or business who is owed money by the person/business filing for bankruptcy can dispute the discharge.

When a creditor (someone who is owed money) disputes the bankruptcy, it can result in bankruptcy litigation. One common type of bankruptcy litigation involves dischargeability of debts. Since not all debts can be forgiven even in bankruptcy, there are cases where the debtor or creditor must file a lawsuit within the bankruptcy case to ask the court to decide whether the debt will remain.

What legalese do you need help decoding?

Caption: Helping you speak “legalese”: What is Bankruptcy Litigation?

I hope this you find this breakdown of “bankruptcy litigation” from our attorney (NAME) helpful!  
What other legal terminology would you like to see us breakdown?

If you find yourself as a debtor or creditor involved in bankruptcy proceedings, please reach out to us on our website via the link in our bio.

#lawfirm #bankruptcy #legaladvice #legaltips #njlawfirm #nyclawfirm #njattorney #nycattorney #njlawyer #nyclawyer #attorney #lawyerlife #legalterm #lawsuit #lawyer #njrealestate #legalese #morristown #legaladvocate #lawfirms #lawyersofinstagram #definition #law #legal #lawyertalk #attorneylife #attorneysofinstagram #legalterms #legallesson #legallessons

\*\*Attorney advertising. Past results do not guarantee the same results to future clients.

# August 9th

Riker Danzig

Social

**LinkedIn & Instagram Feed Post  
Introducing the Team: Michael R. O'Donnell**

Copy:

Meet the Riker Danzig LLP Team!  
Michael R. O'Donnell is a Co-Managing Partner of the Firm, and has been with the firm for over 34 years.

Mike O'Donnell provides a range of commercial litigation services to clients—particularly title insurance companies and financial institutions.

When he is not practicing law, Michael O'Donnell is active in the community. He is currently Chair of the Board of Directors of Zufall Community Health Centers. He is a Life Fellow of the American Bar Foundation. He is a member of the American Bar Association (TIPS Title Insurance Committee), Title Counsel Section of American Land Title Association, the Association of the Federal Bar of New Jersey, New Jersey State Bar (Banking, Real Estate and Federal Bar Sections), and Morris County Bar Association (Financial Services Committee). Finally, Mike had the honor of serving five years in the United States Marine Corps.

Follow to learn more about our practice and team, or click the link in our bio if you or your business needs legal assistance.

#lawfirm #lawfirmpartner #legaladvice #legaltips #njlawfirm #nyclawfirm #njattorney #nycattorney #njlawyer #nyclawyer #attorney #lawyerlife #meettheteam #lawsuit #lawyer #titleinsurance #financiallaw #morristown #legaladvocate #lawfirms #lawyersofinstagram #law #legal #lawyertalk #attorneylife #attorneysofinstagram #legalese #knowyourlawyer

\*\*Attorney advertising. Past results do not guarantee the same results to future clients.

**Michael R. O'Donnell**  
Co-Managing Partner of the Firm

140 Years of Excellence  
**Riker Danzig** LLP

Introducing the Riker Danzig Team

LinkedIn Article or Feed Post

IG Carousel

Myth Busting: Cyber security - Hackers don't target small businesses

# August 14th

Riker Danzig

Social

Myth: Hackers don't target small businesses.

While Riker Danzig helps clients with the legal difficulties presented by cyberattacks, loss of electronic data, mistakes in electronic fund transfers, and other computer-related issues, we know that preventing cyber security breaches is a lot better for our clients than litigating them.

While mainstream news may only cover cyber attacks on large organizations, small businesses are at risk too. While larger businesses may mean payday for a cybercriminal, these criminals also know that small businesses may be easier targets due to weaker security procedures.

What can you do to prevent an attack? Set formal password policies for your company, install updates when necessary, and always use security software.

If your company is already facing cyber security related legal difficulties, contact Riker Danzig LLP via the link in our bio to see how we can help.

#lawfirm #mythsfact #cybersecurity #smallbusiness #cyberattack #legaladvice #legaltips #njlawfirm #nyclawfirm #njattorney #nycattorney #njlawyer #nyclawyer #attorney #lawyerlife #lawyer #morristown #legaladvocate #lawfirms #lawyersofinstagram #law #legal #lawyertalk #attorneylife #attorneysofinstagram #legalese #legalmyths #cybersecuritymyths

\*\*Attorney advertising. Past results do not guarantee the same results to future clients

LinkedIn Article or Feed Post

IG Carousel

Myth Busting: Cyber security - Hackers don't target small businesses

# August 14th

Riker Danzig

Social

## MYTH:

Hackers don't target small businesses.



## FACT:

Hackers target businesses of all sizes.



PREVENT  
CYBER  
ATTACKS  
BEFORE THEY  
HAPPEN

Too late for that? Read on...



## NEED LEGAL CYBER SECURITY HELP?

Check the caption for ways Riker Danzig LLP can help with legal issues resulting from cyberattacks, loss of electronic data, mistakes in electronic fund transfers, and other computer-related issues.



Case settled! Congratulating firm partner, Scott A. Ohnegian, on settling his client's employment case.

Riker Danzig represent businesses in matters involving employee relations, unlawful discrimination, wrongful termination, and employment contracts.

Riker Danzig's Labor and Employment Law Group has consistently been highly ranked by *Chambers USA: America's Leading Lawyers for Business* since 2004 and we are happy to celebrate another win of a great settlement deal for our client.

Does your business have a labor or employment law case of your own? Reach out to us via the link in our bio and we'll see how we can work together.

#lawfirm #clientwin #legaladvice #legaltips #njlawfirm #nyclawfirm #njattorney #nycattorney #njlawyer #nyclawyer #attorney #lawyerlife #casesettled #lawsuit #lawyer #employmentlaw #laborlaw #morristown #legaladvocate #lawfirms #lawyersofinstagram #settlement #law #legal #lawyertalk #attorneylife #attorneysofinstagram #winthecase #verdictisin

\*\*Attorney advertising. Past results do not guarantee the same results to future clients.



Questions:

Can you give us a very quick overview of what estate planning is?

At what age or time should someone start estate planning?

What types of clients does Riker Danzig take for their estate planning services?

Why would you recommend Riker Danzig for estate planning services over another law firm?

Any final thoughts on estate planning you really wish more people knew?



Why do our clients choose us?

Excellent service and results! Let's not toot our own horn though, instead let's hear from happy client, CLIENT NAME HERE, about her 5-star experience with us:

"This firm was an absolute joy to work with. Amazing staff and Attorneys that made getting my title case handled a piece of cake. The team that handled my case, lead by Ronald Ahrens, kept me informed and aware of the progress every step of the way. They are kind and considerate and thoughtful individuals who care about the people they represent not just the outcome. I am grateful for their hard work, dedication and humanity."

If you have worked with our firm, we would greatly appreciate you leaving us a review on Google. We would love to hear about your experience working with us!

#lawfirm #5starreview #clienttestimonial #legaladvice #legaltips #njlawfirm #nyclawfirm #njattorney #nycattorney #njlawyer #nyclawyer #attorney #lawyerlife #titleinsurance #lawsuit #lawyer #happycustomer #happyclient #morristown #legaladvocate #lawfirms #lawyersofinstagram #heretohelp #law #legal #lawyertalk #attorneylife #attorneysofinstagram #winthecase #googlereview

\*\*Attorney advertising. Past results do not guarantee the same results to future clients.

CLIENT NAME HERE

140 Years of Excellence



Riker Danzig

This firm was an absolute joy to work with. Amazing staff and Attorneys that made getting my title case handled a piece of cake. The team that handled my case, lead by Ronald Ahrens, kept me informed and aware of the progress every step of the way. They are kind and considerate and thoughtful individuals who care about the people they represent not just the outcome. I am grateful for their hard work, dedication and humanity.

## TESTIMONIAL

# THANK YOU!

# MARKETING STRATEGY

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**Cover Page: Page 58**

**Environmental Analysis Canvas: Pages 59-63**

**Executive Summary: Pages 64-65**

**Organizational Plan: Pages 66-70**

**Blue Ocean Map & Strategy: Pages 71-72**

**Service Blueprinting: Pages 73-77**

**Strategy Map: Pages 78**

**Test Plan (KPIs): Pages 79-80**

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# Marketing Strategy:

## FXNow



Julia Everitt

## **Environmental Analysis Canvas: FXNow**

### **Business Archetype: Product Innovation**

My business for my marketing challenge is a streaming service called FXNow. The business archetype that my business falls within is "Product Innovation." FXNow fills a niche that existing streaming platforms do not. Not only will the service provide television and movie content not available on other streaming platforms, it also will have a social networking component not seen in other streaming services.

### **Market Forces**

Customers are on the precipice of being priced out of purchasing access to all streaming platforms. In earlier years of streaming, customers were able to access all of the content they would want to watch on just one or two streaming services. Now, every network is starting their own streaming service and it is no longer cheaper to stream content if you purchase every possible subscription than it is to purchase a cable package. Bundling streaming services together has begun to be common, but it is likely we will start to see people only opting for certain streaming services instead of subscribing to all of them, requiring individual streaming services to compete with one another for viewership more than they previously were. The biggest growth potential is in younger audiences, gen Z and millennials. Switching costs are low, so it would be easy to entice customers to try the service, but also would be difficult to retain customers. The customers are most willing to pay for the unique content they want to see. If our service has access to a show they want to watch, that is not available on other services, they will purchase a subscription.

### **Industry Forces**

FXNow's main competitors are other streaming services and cable television providers. One of the newest entrants to the streaming market is Peacock which currently holds the competitive advantage of having a basic service that is entirely free to consumers. Other players to consider is those creating the content that will be on the streaming service. Even while working with FX's existing library of content the service heavily depends on being able to purchase or license new content from production companies and other networks. The most influential stakeholders for FXNow are investors and employees for the platform.

## **Key Trends**

The largest technological trend in streaming in 2021 is into content creation. Increasingly, streaming services are expected to not distribute content but be actively creating their own content (Wastcoat). New streaming copyright laws make illegal streaming a felony instead of a misdemeanor, decreasing illegal streaming activity to put more money back into the pockets of streaming services (Slater and Watts). Disposable income for the main target demographics (gen Z and millennials) is low, especially due to the global pandemic.

## **Macroeconomic Forces**

The economy is currently rebounding from the major effects of the COVID-19 pandemic. The pandemic has further widened the economic inequality gap contributing to a shrinking middle class. It is currently more difficult and expensive to acquire resources to run a streaming service given that productions for creating new content are subject to meeting COVID-19 regulations, increasing costs. It is likely will soon be seeing a decrease in these added costs with vaccinations lowering concerns about COVID-19. Having a fully online product means our services are easily accessible to all potential customers.

## **Needs and Demands**

Demand in streaming is increasing for a service that has everything they want to watch in one place. Customers want to be able to just use one streaming service and be able to watch every show they want on it. With the increasing number of streaming services, the problem of needing to subscribe to multiple services in order to get all of the content a user wants is growing.

Demand is also increasing for new content. Customers want shows that not only they have not seen before, but that also speak to the moment that we are living in. They want content that is not just new to them, but new, in and of itself.

We also see a demand for better recommendation algorithms. It can be difficult to find something new to watch when one has just finished a movie or series they like. Some users find themselves rewatching the same shows because it is easier to rewatch something they already know they like than to bet their time on something new that might be lackluster.



## **Competitors**

Our competitors are Netflix, Hulu, Paramount Plus, Amazon Prime Video, YouTube TV, Sling, Disney Plus, Crunchyroll, HBO Max, other streaming services, and cable TV. The most dominant players in this sector are Netflix, Amazon Prime Video, and Hulu. They've all been in the marketplace for a while and offer a robust selection of content.

The age of these competitors in the marketplace could serve as both an advantage and a disadvantage for them. Their time in the industry has given them the knowledge and resources to be competitive, but on the other hand, it has given people time to watch the content on those platforms that they were interested in. If a customer subscribed to Netflix to watch a specific show, they may be willing to cancel their subscription and purchase a membership on a different platform now that they have already watched that show.

## **Substitute Products and Services**

The main substitute for streaming services is cable television. The cost of cable television is significantly more expensive than the cost of our streaming service, but also offers a greater selection of content than our service does. The switching costs are relatively low for a customer to move from our service to a cable plan.

Other substitutes for our product would be other entertainment and leisure activities. Watching YouTube videos, listening to podcasts, or reading books could all be considered substitutes to our product. The costs of these alternative are all lower than the cost of our streaming service.

## **Societal and Cultural Trends**

One cultural trend that we've seen in the consumption of entertainment and media is binge watching. There is a trend towards users wanting to consume all of a new show in as few sittings as possible. If a buyer purchased a subscription to a streaming service to watch one show, with binge watching, it is possible they would consume the entire show in a short time frame and cancel the subscription after the first month.

One societal trend that we've seen is a desire for ethical entertainment. People want the content they are watching to have been made under ethical conditions and without indirectly supporting injustices or human rights violations.

## **Global Market Conditions**

The shrinking middle class and high rate of underemployment could negatively impact the market for niche and luxury goods such as streaming services. The economy is currently growing as it recuperates from the severe losses of the previous year.

Global growth is predicted to be 6% for 2021 (World Economic Outlook). This expected growth rate is higher than that of other recent previous years, indicating a stronger global economy is emerging.

## **SWOT Analysis**

Taking a look at a SWOT analysis for FXNow, some of our major strengths are that we have low variable costs and our costs are predictable. Some of the weaknesses our business has are that we incur high costs before we collect revenues and that we currently have weak customer relationships. Some opportunities FXNow has that it should take advantage of are that our business benefits from economies of scale and our key activities are difficult to copy. The main threats for FXNow are market saturation and competitors threatening our market share.

## **Future Environmental Conditions**

The market for streaming services is very competitive and will only grow more competitive over time. It is likely customers will grow frustrated with the number of different subscription services they will need in order to access all exclusive content. It may become important for FXNow to partner with other streaming services to bundle their content.

While the streaming market is getting more competitive, there is an increased interest in streamed content as well as growing economy. This should offer some opportunities for FXNow. Luckily also for FXNow, our target demographic, Gen Z and Millennials portion of wealth should grow over time and increase their potential to purchase our product. The future for FXNow appears to be one with very stark competition, but also with many opportunities.

## Sources

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## **Executive Summary: FXNow**

Cable television is quickly falling to the wayside in favor of streaming services. The share of Americans who say they watch cable television has fallen from 76% in 2015 to 56% this year (Rainie). In addition to the fall of cable television, the market for streaming services is currently quite homogenous, offering tv shows and movies to be streamed, but nothing more.

FX has the opportunity to expand its current revenue streams and get ahead of the downfall of cable by investing in the streaming platform, FXNow. FXNow should employ a Fast FX strategy in that it should launch its new FX platform as quickly as possible, with primarily existing FX properties, in order to enter and get a foothold in the streaming wars to continue to grow from. I recommend for Gen Z and millennial audiences who love to binge watch and converse about their favorite shows, FXNow is the streaming service that offers exclusive content and a unique comment interaction system because it wants you to experience the next step in streaming. The likely investment to make this service a reality is approximately \$200,000 for the site and application itself and an additional \$100 million to build on the existing FX catalog of content.

The product we are creating is a streaming service offering FX's current library of content, new televisions shows and movies, and a user interface that allows for comments, conversations, and recommendations. Our target market is Gen Z and millennials because these groups will offer us a higher lifetime value and easier marketing options. The price we are offering this service at is \$4.99/month (or annually for \$49.99/year) with ads, or \$8.99/month (annually \$89.99/year) for an ad-free experience to appeal to price sensitive and non-price sensitive groups. This rate is \$1/month less for the ad-free version than our comparable competitor, Paramount Plus, in order to increase demand and interest at launch. The service will be available globally and require an internet connection to access it. FXNow's promotion strategy starts with capturing the approximately two million people who currently view FX content by running commercials on FX network's cable presence, offers a two-week free trial to potential subscribers, and focuses on FXNow's key aspects of exclusive content and innovative interactive platform. Participation will include maintaining an active and pro-active social media presence engaging with consumers about what they like and don't like about the platform. We will seek to have 100,000 followers and 250,000 followers on the key social platforms of Twitter and Instagram, respectively, with accounts on all major social media platforms.

We expect the profits for FXNow to be around \$90 million in its first year, with anticipated growth to profits of \$900 million in year 5. The number of subscribers we believe we will have within the first year is 1 million subscribers, with an expected increase in subscribers to 15 million within 5 years. We expect a low churn rate of approximately 5%, indicating the loyalty and satisfaction of our customers.

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## **Portfolio Plan**

FXNow is a new-to-company product as well as business model. While there are no other services exactly like it on the market at the moment, it combines elements of existing entities such as popular streaming services and comment sections akin to YouTube or social media platforms. This puts FXNow in position where there is moderate severity of conflict, as well as moderate strategic dissimilarity from FX's other entities. Given this information, we will look at other aspects of the organizational plan.

## **People Plan**

In order to address this challenge, it would be most optimal to have a management team that is well-versed in the streaming world as well as has strong connections with key collaborators. In addition to these skills, it would be useful to have members on the management team who have a proven track record of successes with this type of work. A skilled and ambitious team should have no problems building and executing a business model for FXNow. Questions I would have about each person in the team would be: what are the main ways and platforms on which you consume video content, what has your experience with entertainment/media been like, and what is your approach to working with others on long-term projects? It will be important for members of the company to have empathy for one another to allow them to work well together, so a potential strategy for fostering empathy in the workplace would be to prioritize active listening as well as avoiding making assumptions about other workers. Given the company's structure, employees have a variety of different jobs, it would be best for company culture for those differing jobs to not take on a hierarchical structure and remain on an even playing field. Employees will report to managers but management should maintain an open line of communication with employees. Rewarding employees for superior work should come in the form of additional time-off to avoid employee burnout.

## **Culture Plan**

One way to cultivate the desired culture at FXNow is for employees to watch the content that is on the platform (during working hours), regardless of how directly their job relates to the actual production-side of the media. It may also be helpful to have regular meetings where different segments of the company share what they are working on, again, even to those it does not

directly affect. The more familiarity employees have with one another, the easier it will be for empathy to brew. The “object” that is most important to have the most eyes on is the website and smart TV application’s design and user interface. It is important to get feedback from all segments of the company, as well as customers on the functionality of this particular “object.” The best way to share the vision for the company’s future is to communicate it in multiple manners—both in person through presentational meetings about trajectory, through documents distributed via email about where the company is going, and through prototyping, showing mock-ups of new advancements and features so everyone at FXNow is very aware of what the future of the company and the product looks like.

### **Processes Plan**

The value discipline driving the business model for FXNow is Product Leadership. In order to support that model, we need to be consistently innovating and staying one step ahead of competitors that may enter our arena. We need to foster creativity at our company in order to feed these new innovations. It is important for new ideas to come on both the content and production side, as well as on the web design and user interface front. These ideas can come from upper management, producers, and web designers, though we should be open to new ideas from individuals outside of these positions as well. The best way to motivate employees is to make FXNow a company that they want to work for. We can do this by allowing more flexible hours, creating an open workplace culture, and offering opportunities for advancement. The best way to motivate partners and customers is to consistently produce high-quality content offered on an innovative new platform.

### **Structure Plan**

In order to support the Product Leadership value discipline, FXNow must maintain a structure that prioritizes creation of new ideas and content. The structure should include employees with a background in this type of innovation and should factor in time and funds to try new ideas. It is important for those working on the functional end to be very integrated with one another. The functional aspects of the site itself and the content do not necessarily need to be integrated in order to be successful. It would likely be easiest if the producers on the content end acted independently from those working on the actual interface of the service. Management should be heavily integrated in both aspects of the service and should serve as the link to make sure the two



entities will be compatible with one another as a final product. The best management structure for cultural change is one where management does not take on a hierarchical structure and employees feel on the same relative playing field with the managers so they are able to communicate honestly about their problems and ideas.

### **Rewards Plan**

The key performance indicators we are looking at for FXNow are the total number of subscribers, number of premium subscribers, number of comments in-platform on video content posted, cost per season of a show, number of views for cost, website ease of use, the success vs failure rate of the comment moderation system, how users rate content on the platform, and how many customers move from basic to premium subscriptions. Given these as the KPIs for the company, the reward structure that makes the most sense to support these indicators as well as the business model is to reward those who are involved in creating the most highly rated content, those involved in creating the most watched content, those who perfect the website's ease of use, and those who find methods to attract more subscribers. The best way to reward these individuals and teams is through bonus paid time off, so that they will avoid burnout as well as want to continue working at FXNow. I believe this reward structure will facilitate a changing culture because it will encourage employees to work effectively, but also allow them time off to recharge so they can work at their full potential.

### **Research Plan**

In order to test if our business model assumptions are working, we will need feedback from customers and target market as well as knowledge on what our competitors are doing. We could get feedback from our customers by randomly selecting a sample size of them and offering them a month free of service for filling out a survey. In order to get feedback from non-customers in our target market we would have to pay them to fill out a survey. The best way for us to gain insight on what our competitors are doing is through secondary research as well as using their services for comparison. We will explore different questions with each group of people. From the customers we will ask what their favorite and least favorite aspects of the platform are, why they subscribed in the first place, why they stay subscribed, what price they would be willing to pay to stay subscribed, and what their favorite shows on the platform are. The questions we will ask non-customers is why they haven't subscribed, is there a price point where they would

subscribe, what their favorite TV shows are, and what, if any, other streaming services or cable are they subscribed to. From our competition we would be exploring what updates they are making, what content they are providing, and how seamless the experience of using it is. It would be best to request survey responses from approximately 500 users, hoping for 100 responses, getting 100 responses from non-customers, and researching as many of our streaming competitors as possible, but focusing on bigger services. This research should happen within the first sixth months of the release of the service. The marketing department will be responsible for these survey and research efforts, but the reports from the survey will be given to relevant departments for implementation. Company and customer interviews will be recorded so anonymous transcriptions will be available to relevant employees, and brief notes will be taken that highlight key points and important insights from interviewed parties.

### **Implementation Plan**

Projects to be implemented include creating an algorithm for content recommendations, creating additional library content, and creating an algorithm for comment moderation. It would be best for everything to be completed with a prototype created for testing within eight months, and a final product ready for use by customers within 14 months. Critical KPIs include useful content recommendations, number of movies and TV shows available on the platform, and correct comment flags vs incorrectly flagged comments. The path forward starts with building a website and algorithms to make the site function properly. Creating new content is of secondary importance because should it need to, the site could launch with FX's current catalog without additional new content, but new content should be in the pipeline, created by different people while the site is being built and tested.

### **Risk Plan**

Limiting factors and obstacles for FXNow include steep competition, low switching costs, and limited resources. Critical success factors are the existing audience base from FX, employee training and education, and excellent management. One specific risk faced by FXNow is backlash for moving content off of existing streaming platforms for a new one they would have to pay an additional fee for, which will be countered by the promise of more content than they would have gotten otherwise as well as an innovative platform design. Another risk faced is

customers prioritizing competitors, which we will counter by offering our service at a lower price.

### **Conclusion**

With the information above, FXNow has a plan to move forward with its operations. It will be looking at various KPIs including subscription numbers and site functionality. The knowledge of risks from competition and customer backlash will keep us aware of preemptive measures we must take to satisfy customers. Our business model is based on new innovation, with this organizational plan we will be able to stay one step ahead of competitors in order to compete in the product leadership sphere.

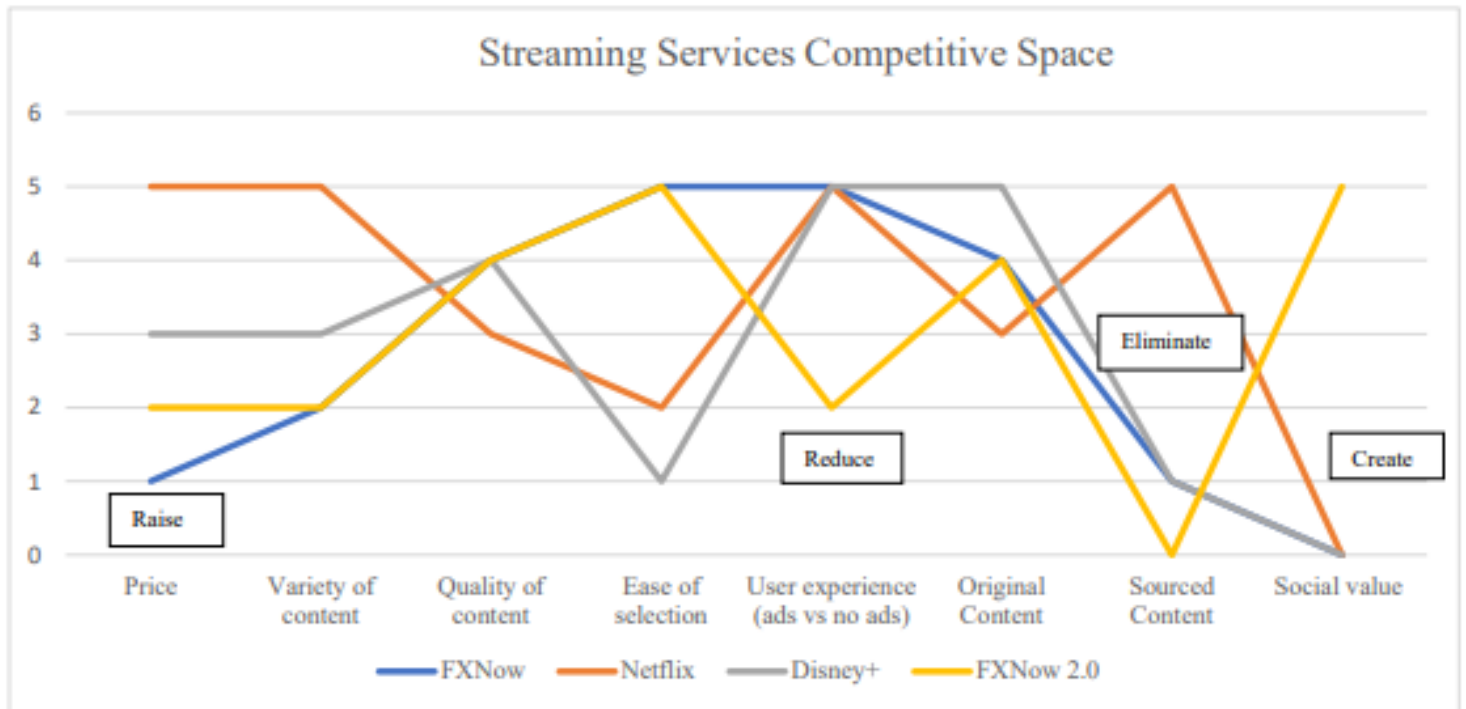
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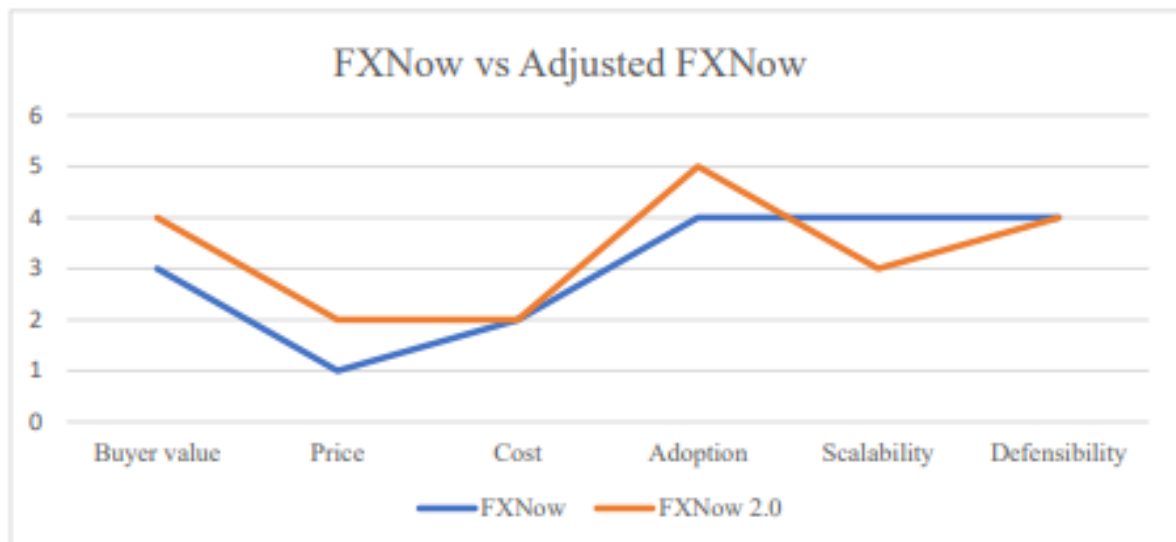


Julia Everitt **Blue Ocean Map**



- a. Eliminate: Sourced content
- b. Raise: Price
- c. Reduce: User experience (add advertisements to video content)
- d. Create: Social value

2.



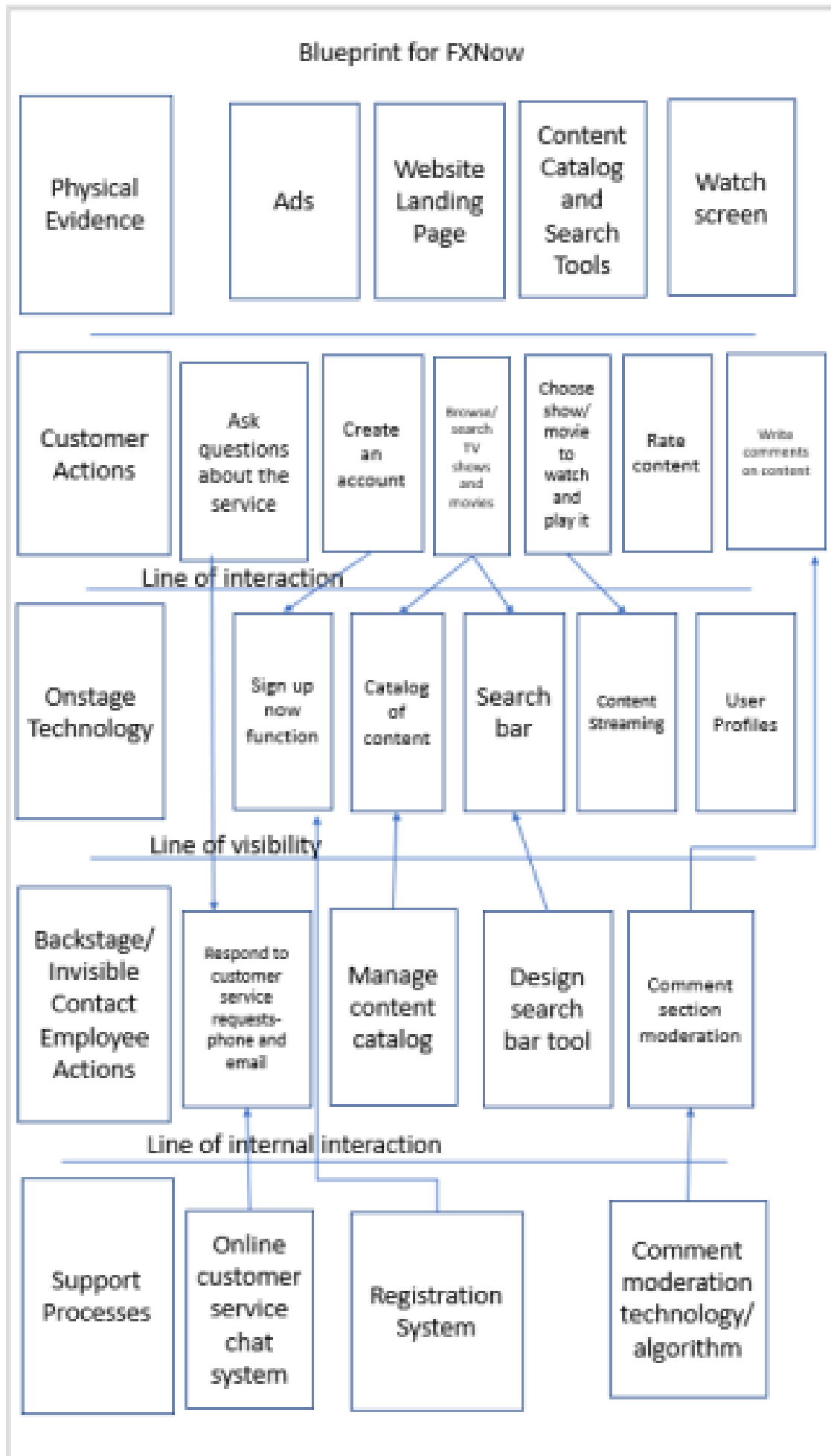
The strategy I am taking to create a Blue Ocean for my product, FXNow, is by creating a social component to my streaming services not seen in its competitors. With FXNow, users are able to leave comments on content and otherwise discuss the TV shows and movies they are watching with other users. They are also able to get better recommendations for what to watch next based on feedback and recommendations from other users, as well as an algorithm offering suggestions based on content the user has already watched and any ratings the user has left on previously viewed content.

Creating this additional social component will offer users another way to engage with the content and platform, but does come with costs to the company. Additional employees will need to be hired in order to moderate comments on the platform to avoid hate speech and other negativity in comment sections that is not conducive to having meaningful conversations about the content that users have watched. To take some of the moderating strain off of staff members, we would also create an automated tool to moderate these comment sections.

Additionally, this comment section tool will allow us to better understand what content our users are interested in. With a combination of viewing metrics such as the number of comments, number of reviews, and engagement via comments and reviews in relation to number of views, in addition to some in-platform social media listening, we will be better informed about which content of ours engages viewers. This will give us ideas on future content to create, benefitting both the company, in making it easier for us to determine our customers' interests, as well as beneficial to our customers because they will get more content that they find interesting and engaging.

FXNow will only offer content that is exclusive to the FXNow platform. Subscribers will only be able to view FX created content on the platform. This allows us to charge a lower monthly price to customers since we are not paying other companies to source their content in addition to our own content we have and are currently creating. Limiting the content will also make it easier for customers to determine their next show to watch, reducing the common problem of deciding what to watch next.

# Everitt Service Blueprinting



## Everitt Service Blueprinting



### **Nine Blueprinting Steps**

The first step of the service blueprinting process is to decide on the company's service to be blueprinted as well as the objective of blueprinting it. The service my marketing challenge focuses on is the FXNow streaming service so that was the service I blueprinted. A competitor for FXNow that is not also a streaming service is cable television so it made sense to me to choose that to gain insight on how the two compared. My objective for creating these blueprints was to gain insights about the service process, compare how different the processes were between FXNow as a streaming service and cable television, and get a better idea of how the service process currently works to inform potential improvements.

The second step of the service blueprinting process is to determine who should be involved in the blueprinting process. Given that this is only a hypothetical company, the only person who was involved in this process was myself. If it were a more legitimate process, it would be helpful to get input from representatives from the web designers, customer service support staff, content curators, and customers.

The third step is to modify the blueprinting technique as appropriate. Given that my service is online rather than in-person, I modified my blueprint to include a section on "Onstage Technology" rather than on "Onstage/Visible Contact Employee Actions."

The fourth step of service blueprinting is to map the process the way it happens the majority of the time. My service blueprint follows a typical usage scenario, though does provide for circumstances where a customer may require support, which throughout the customer's use of the service, is likely enough to happen once that it was a valid inclusion in the service blueprint.

The fifth step of service blueprinting is to note disagreements between parties working on the service blueprint. Given that the only person working on this service blueprinting process was myself, I had no disagreements to note at this time.

The sixth step of creating a service blueprint is to make sure that customers remain the focus of the blueprint. Every aspect of my service blueprint centers the customers. I built off of the Customer Actions section to assure that the customers remained the key focus for my service blueprint.



## Everitt Service Blueprinting

The seventh and eighth steps are to track insights gleaned from the process of creating the service blueprint and develop recommendations and future actions from the blueprint. These insights, recommendations, and future actions will be discussed later in this document.

The ninth step is to “*if desired*, create final blueprints” for company use (Bitner 81). In this case, the process of creating the blueprints was done to find insights and not for use in training employees or company-wide usage at this time.

### **Insights and Innovations from Blueprinting**

One key insight that I gleaned from making these two service blueprints is how different the service processes are for a streaming service versus a traditional cable TV service. While in many cases these two seem to be relatively perfect substitutes for one another, there are many differences particularly in the arena of “visible contact employee actions.” There is a lot more interaction between employees at a cable provider in comparison to at a streaming service. The lack of a need for an installation appointment and additional equipment is a definite advantage for streaming services, which is an aspect FXNow should try to capitalize on. Another key insight from writing the service blueprint I gleaned was the effects of adding the social component to a streaming service. While it does amplify the customer’s experience of the product, it does add a significant amount of behind the scenes work for the company to the product, this is likely why other services don’t opt to include this as a feature for their product.

While it is an advantage to the customers to not need any equipment or need to schedule any appointments to receive our service, one thing to note is the presence of a cable box, remote, and TV channel guide do serve as reminders to a customer about the existence of their cable access. These visual reminders could serve as free pseudo-advertising for the cable companies for the customers continued patronage. It would be interesting for FXNow to consider creating a guide or other physical entity to send to customers, either a catalog of shows and movies, or a periodic brochure stating what is new on the platform. This physical piece of evidence could serve as a reminder to customers not only that they have an account, but also that there is other new content available to them as long as they choose to continue their subscription. Looking at the service blueprints for FXNow and a competing business, cable television offers useful feedback on the key advantages and disadvantages of the use of one service in comparison to the other.

## Everitt Service Blueprinting

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Corporate Objectives

Revenue Growth Strategy

Productivity Strategy

Financial Perspective

Increase overall subscribers.  
KPI: total # subscribers

Increase number of premium subscribers.  
KPI: # premium subscribers

Improve product's value to justify price increase  
KPI: # customers who continue to subscribe post-price increase

Create low cost assets.  
KPI: cost per season of show

Strategize, figure out which shows get the most bang for their buck  
KPI: number of views for cost

Customer Value Perspective  
Product Leadership

Participation  
KPI: % of users regularly leaving comments on content

Quality  
KPI: how users rate content on platform

Consistent updates

Exclusive shows/movies

Excellent recommendation algorithm

Internal Process Perspective

Increase marketing efforts to onboard new subscribers  
KPI: total # subscribers

Use in-service advertising to advocate for customers to upgrade subscriptions  
KPI: # customers who move from basic to premium subscriptions

Develop automated content moderation system  
KPI: successful flagged comments vs false flags

Conduct research on content users are interested in watching  
KPI: # viewers

Learning and Growth Perspective

Social media strategy  
KPI: # posts referencing FXNow or FXNow content

Web development  
KPI: website ease of use

Expanding producing partners  
KPI: # of affiliated production companies



One important KPI for FXNow is the number of subscribers to the service. This KPI is a very clear indicator of whether or not “desirability” is being achieved as the number of subscribers would increase as customers and stakeholders are seeing their needs met by the platform and decreasing if their wants and needs are not being met.

Another KPI that would clearly indicate the viability of FXNow would be net income. Given that net income indicates the amount of money brought in minus expenses, it would be a good indicator of whether the service is profitable, since it accounts for both income as well as costs.

A third KPI for FXNow based on its business model is the functionality of the user interface and the website’s ease of use. This KPI would be a good indicator of the feasibility of what FXNow is trying to accomplish. The most challenging to implement and most unique aspect of FXNow is the user interface, so how well it works would be a good indicator of “what can be accomplished with the resources and expertise at hand” (Henshaw & Swan).

A fourth KPI and one that would indicate high desirability would be the percent of users regularly leaving comments and engaging with the content. Some users would simply subscribe to FXNow purely because it has exclusive content they cannot access on other streaming services, but measuring how many users engage in additional features outside of simply streaming content would indicate how worthwhile they found these additional features or whether they found them unnecessary and frivolous.

A fifth KPI that would reflect the viability of the platform would be content creation cost per view. Knowing how much money is spent to create a TV show or movie on the service compared with how many views that piece of content ends up getting could indicate whether certain shows or types of movies are worth continuing, as well as indicate the overall success and margins for the service.

The final KPI I believe would be useful for representing the feasibility of the service would be the number of correctly flagged comments versus incorrectly flagged comments. Since users are allowed to leave comments on the content, there will be an algorithm in place to moderate content to defend against hate speech, cyberbullying, etc. Measuring how often this comment moderation system correctly versus incorrectly flags profane and benign comments will indicate how functional and therefore how feasible including this feature is.

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