



“At the heart of competition is strategy. At the heart of strategy is unique value. We help our clients become better known, better understood and better understand the unique value they deliver.” – Colby B. Jubenville, PhD

We are Red Herring Innovation and Design, a group of people that obsess about the red herrings that others face. We help our clients look differently at themselves and their competition and see innovation in new ways. The result is a new level of performance and along with it an intentional mindset about designing what they do. **In essence, we help our clients become better known, better understood, and better understand the unique value they deliver.**

## Strategic Needs Analysis

**How effective are overall efforts in areas of strategy, marketing, innovation, design and communications?**

- Does your brand stand out or fit in with the competition?
- Can your people tell your story in a way that is compelling and easy to understand?
- Is it important to know what customers think about you, want from you and would be willing to pay?
- How much better would your organization perform if your team could focus their efforts on building demand?
- What new levels of success could be achieved by working with a team of marketing and communication experts who truly understand your business and your customers?

## Here's How It Works:

### **Step 1 – We'll come to you.**

Specialists from Red Herring Innovation and Design will meet with you and your management team anywhere throughout North America. Our clients benefit from a wide range of services utilizing our core competencies of Strategic Marketing, Innovation and Design & Communication services. Our methods and approach help our clients build better brands, elevate customer experiences, and optimize their platform for consistent growth.

### **Step 2 – We'll listen and share our insights.**

## Strategic Needs



During our time together we want to understand what is working, what isn't working and most importantly, grow your bottom line. Our approach allows your management team to ask questions and gain honest feedback about opportunities for growth.

At Red Herring, we answer these kinds of questions for our clients every day. We have worked with a variety of industries and have helped our clients find growth and success in every facet of business. Our team has worked with top executives in pharmaceuticals, education, home building, medical devices, banking and finance – to name a few.

### **Step 3 – We'll deliver.**

Red Herring will deliver a written assessment providing expert insight based on our experience and your perspective with a detailed plan that results in focus, clarity and direction.

## **Understanding, Creating and Sharing Unique Value**

*"We specialize in helping people and organizations become better know, better understood and better understand the unique value they deliver."* – **Colby Jubenville, PhD Principal RHID**

*"If a story is not about the hearer he will not listen. And here I make a rule – a great and interesting story is about everyone or it will not last. The strange and foreign is not interesting – only the deeply personal and familiar."*

– **John Steinbeck**

"I've been working with RHID for over 2 years now and have had a remarkable experience. Their creativity, combined with unique solutions for articulating and branding in a highly competitive marketplace, has helped position our company and marketing strategy for years to come! If you need a branding solution, I highly encourage you to speak with Colby!"

– **Andy Voyles, CRMS Vice President Retail Division - First Community Mortgage, Inc.**

## **Strategic Needs**



## NEEDS ASSESMENT & AGREEMENT

This NEEDS ASSESMENT AGREEMENT ("Agreement") is effective as of the \_\_\_\_ day of \_\_\_\_\_, 2014, and is by and between RED HERRING INNOVATION AND DESIGN ("Red Herring Innovation and Design"), a Tennessee Sole Proprietorship, with offices at 2821 Cherry Blossom Lane, Murfreesboro, TN 37129 and \_\_\_\_\_ ("Client"), a \_\_\_\_\_ corporation with offices at \_\_\_\_\_.

### BACKGROUND

Red Herring Innovation and Design has specific expertise in helping people and organizations **better known, better understood and better understand the unique value they deliver** relating to innovation and design, strategic marketing, branding, social media, interactive technology and promotional services. Client desires to engage Red Herring Innovation and Design for a one-day Needs Assessment Consulting Assignment (the "Assignment") on \_\_\_\_\_, 2014 to evaluate client's current situation with regard to such services and provide an assessment and recommendations resulting from the Assignment.

### TERMS

NOW, THEREFORE, for good and valuable consideration and intending to be legally bound, the parties hereto agree as follows:

Services: As part of the Assignment, RHID will provide a senior consultant to interview client management team at the Client's place of business to collect information and general understanding of the following areas of the client's business operations:

## Strategic Needs

**1.1. Collective Passion Filter – Brand Storyline**

- ☐ Brand Equity Audit (identity, image, relationship or experience)
- ☐ Brand Position Statement (BPS)
- ☐ Operationally Define Quality
- ☐ Brand Messaging through Simple Truths
- ☐ Audience of Many, Audience of One

**1.2. Collective Passion Filter - Experience Storyline**

- ☐ Branded Customer/Employee Experience
- ☐ Competitive Product Mapping
- ☐ Customer Journey Mapping

**1.3. Collective Passion Filter - Management/Culture Storyline**

- ☐ Management Values Audit (Core, Shared, Competing)
- ☐ Management Philosophy Audit (Basic Form of Human Understanding)
- ☐ Clarity of Vision
- ☐ Active Leadership (Mission)
- ☐ Alignment of People and Strategy (Goals and Objectives)
- ☐ Continuous Reinforcement and Communication of the Message

**1.4. Market Environment Review**

- ☐ Trends Analysis
- ☐ Competitive Analysis

## Strategic Needs

**1.5. Target Market Profile**

- ☐ Customer Segment Review
- ☐ Target Market Analysis
- ☐ Buyer Persona Profile
- ☐ Customer Insights/Focus Groups

**1.6. Interactive Technology**

- ☐ Website Design and Deployment
- ☐ Creative Design for Media and Advertising
- ☐ Back End Custom Development and Deployment

**1.7. Digital Marketing Services**

- ☐ Search Engine Optimization
- ☐ Paid Search Advertising Planning and Management
- ☐ Content Marketing Planning and Management

---

---

---

**1.8. Storyboard and Video Development**

- ☐ Storyboard Design and Deployment
- ☐ Video Design for Media and Advertising

## Strategic Needs

### 1.9. Social Media Training and Management

- ☐ Social Media Spot Light Training
- ☐ Social Media Marketing Campaign Planning and Management
- ☐ Social Media Visual branding
- ☐ Social Media Releases (specific releases listed below)

- |                                    |                                |
|------------------------------------|--------------------------------|
| <input type="checkbox"/> Twitter   | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Facebook  | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Pinterest | <input type="checkbox"/> _____ |
| <input type="checkbox"/> LinkedIn  |                                |
| <input type="checkbox"/> Instagram |                                |

### 1.10. Marketing Communications

- ☐ Media Campaign and Press Release generation
- ☐ Media coordination for events
- ☐ Earned media and purchased media negotiation
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_
- ☐ \_\_\_\_\_

### 1.11. Sponsorship Planning and Evaluation

- ☐ Sponsorship and ROO
- ☐ Sponsorship and ROI
- ☐ Values Based Sponsorship Proposal

## Strategic Needs

### 1.12. Promotional Campaigns

☐ Internal Marketing Campaigns

☐ \_\_\_\_\_

☐ \_\_\_\_\_

☐ Customer Promotional Activities

☐ \_\_\_\_\_

☐ \_\_\_\_\_

### 1.13. Public / Community Relations Activities

☐ Hospitality/event planning

☐ Hospitality staff training (pre-event)

☐ Event Risk Prevention and Assessment

☐ Guest tracking (ROI reporting) and feedback tracking

### 1.14. Marketing Planning & Measurement

☐ Marketing Plan

☐ Marketing Audit

☐ Dashboard Development for Key Metrics

## Strategic Needs



## **Deliverables**

Upon completion of the Assignment and a review of its findings, Red Herring Innovation and Design will provide a written report (the "Report") assessing the current situation and providing recommendations in appropriate areas based upon its professional experience.

Should any of its recommendations entail additional services to be provided by Red Herring Innovation and Design; estimated budgets will be provided for the fulfillment of those services.

The Client is under no obligation to make any further payments to Red Herring Innovation and Design unless a separate agreement defining such services is approved by the client. The Report will typically be delivered within no more than ten business days following the Assignment to the Client's designee.

## **Fees and Expenses**

In consideration of the services to be rendered for the Assignment and the Report pursuant to this Agreement, Client shall be responsible for the payments described below:

A consulting fee will be pre-determined for the Assignment and Report

Reimbursement of any out-of-pocket travel expenses required to travel to Client's place of business. Red Herring Innovation and Design will make every reasonable effort to minimize travel expenses by utilizing coach airfare, standard hotels and the least expensive ground transportation options wherever possible.

Should the Client enter into a separate project or retainer agreement with Red Herring Innovation and Design for additional services, the fee for the Assignment and Report will be rebated against any future fees.

## **Confidentiality**

If in the course of execution of this agreement, either party shares information regarding pricing, financial, process, operational, trade secret, design, or other business matters considered to be proprietary, it is understood that it will remain completely confidential. Both parties recognize and agree that unauthorized disclosure of this information will constitute a breach in confidentiality and will result in immediate termination of this agreement and either is free to pursue compensation for damages in a court of law. All intellectual property laws of the United States shall apply.

1. Disputes: Client agrees to honor payment in full for total contract amount including reimbursable expenses.
2. In the event of dispute, the Client will not have rights to offset or adjust these amounts without the express written consent of Red Herring Innovation and Design .
3. If satisfactory resolution is not reached, Client agrees to utilize the American Arbitration

# **Strategic Needs**



Association to pursue the matter through arbitration of major disputes or mediation of minor disputes, the non-prevailing party paying fees and expenses on major disputes for both parties.

4. In any legal dispute the prevailing party is entitled to reimbursement by the other party of all costs, expenses and reasonable attorney fees.
5. Representations: Red Herring Innovation and Design and Client representatives signing this agreement represent that they have full power and authority to enter into this agreement, and that it is binding in accordance with its terms.

## **Rights and Ownership**

All rights to, and ownership of, project material and intellectual property created for the sale and execution of this agreement are reserved to Red Herring Innovation and Design, Inc., including but not limited to designs, copy, drawings, images, original art, photography, comps, proofs, electronic files, scans, themes, concepts, sketches, films and the like except for such items which are the legally copyrighted property of third parties, or which are in the public domain. This information is proprietary and may not be disclosed to any third party, reproduced, posted in global computer information networks, or distributed in any way without written consent.

Client agrees that its directors, officers, employees, agents, suppliers, or others supporting its organization may not mimic, reproduce, manufacture, engineer, assemble, or produce any item depicted in any project materials owned by Red Herring Innovation and Design, Inc., nor will they convey, communicate, or deliver said project materials to any person or entity where it is not directly required for performing work directly related to the execution of this agreement.

## **Payment**

Total consulting fee is due and payable on the date of the Consulting Assignment indicated in the Background Section of this Agreement. Upon receipt of signed agreement, Client authorizes Red Herring Innovation and Design to book all travel arrangements. Out-of-pocket expenses, airfare, or other travel and living expenses incurred by Red Herring Innovation and Design or its subcontractors and not pre-paid directly by the Client will be invoiced upon completion of services rendered. Invoices are due upon receipt.

Addendums:

<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____
<input type="checkbox"/>	_____

## **Strategic Needs**



## Signatures

For: \_\_\_\_\_  
(Company Name)

Accepted by: \_\_\_\_\_  
(Signature)

Name: \_\_\_\_\_  
(Please Print)

Title: \_\_\_\_\_  
(Please Print)

Date: \_\_\_\_\_

Approved by: \_\_\_\_\_  
Colby B. Jubenville, Ph.D.  
Founder & Principal  
Red Herring Innovation & Design

# Strategic Needs