

Orgametrics™ by Infinity Systems

Mountain View Whisman School District Alignment Brand Management



Empower Leaders. Align Organizations. Drive Results

Mountain View Whisman School District Alignment Business Development Program Proposal

Mountain View-Whisman School District (District) wishes to engage in a business development effort that looks to make long-term, mutually-fruitful relationships with the local business community.

Context:

As part of the Community Business Development Strategy, a need to find an engaging story to tell was identified. There’s a story that is specifically donation-focused that is centered on the strategic plan and initiatives such as the 5th and 8th grade capstone project. A structure for these one-on-one meetings will be needed. However, to reach a broader audience more quickly, a message that isn’t donation-centric is needed. That’s where organizational alignment comes in.

One to many, personalized communication

A key target for the District in its Community Business Development efforts is to reach business leaders outside of the corporate giving area. Reaching a larger number of these people at a single venue speeds up the networking process. However, a relevant story to this audience is needed.

Discussing the new Strategic Plan is of interest, but the audience has developed and seen numerous strategic plans and it’s doubtful such a discussion will spark action. Organizational alignment is an issue within any organization in any industry. Engaging in a dialogue with business professionals will be of interest to them as well as will provide insights that can help refine the District’s process. People that hear the District’s message will see an organization that’s thinking innovatively and will want to be part of the journey. This will lead to various business development opportunities for the District.

Taking stories from the Alignment Journey process in which the District will engage (under a separate proposal) to tell an engaging story will be a kickstarter to develop many meaningful relationships. From there, developing and executing a communication and development plan to nurture leads and close partnerships.

Proposed Scope of Work

There are four components to this Business Development Program Process – crafting the story, finding the audience, extending the dialogue and driving the ‘sales’ process.

Crafting the Story



Disengaged



Satisfied



Engaged



Aligned

In conjunction with efforts taken in the separate Alignment Journey process, Infinity Systems will work with the District to develop a story and presentation to deliver during the events secured. Along with the story, an 'ask' to engage in further conversation and to connect with others will be developed.

Should modifications to the presentation and process be needed, Infinity Systems will work with the District to refine the presentation up to 2 times over the course of 6 months after the first presentation is made.

Out of Scope in this area:

- Components of taking the Alignment Journey to be used for the presentation are under a separate proposal.

Finding the Audience

Infinity Systems will work to identify key groups to engage in talking about reaching their audience with the District's message. Infinity Systems will also craft a communications program to engage teachers and staff to identify key parents and network contacts that may be interested in hearing the story within their spheres of influence, given the likelihood that many current and former District parents are in prominent roles in their community.

Infinity Systems will craft an initial communication script that may be used by District staff during initial discussions with identified groups and individuals.

Out of Scope for this area

- Conducting communications and setting up of meetings to tell the story. It's seen that the District would have the resources to perform this task effectively at a lower cost. However, if needed, this could be worked into the scope.

Extending the Dialogue

Once a valuable connection has been made, continued nurturing of those people will be needed. Infinity Systems will develop a lead nurturing process with an editorial communications schedule that may be used through the District's structure.

Infinity Systems will also craft communication themes for on-on-one conversations with key company personnel to further dialogue.

Out of Scope for this area

- Crafting of individual pitch documents companies may require as part of the funding process. This can be brought in scope if the District doesn't have the resources to handle the task.

Driving the 'Sales' Process

Infinity Systems will provide sales funnel support to help the District



Disengaged



Satisfied



Engaged



Aligned

- Planning out a sales process plan in order to devote appropriate resources to the right leads,
- Crafting key objectives and journey paths for individual meetings,
- Setting up of the funnel structure, criteria for moving leads from one level to another and sales coaching on individual prospect accounts that have progressed passed the one-on-one meeting stage towards meaningful funding discussions (delivered via a monthly, one-hour conference with Dr. Rudolph); and
- Tactical development plan, if warranted, for accounts that have reached a certain sales stage.

Infinity Systems sees the foundational portions of Crafting the Story and Finding the Audience occurring roughly 3 months after the Alignment Journey process officially commences. This is in order to gain a reasonable amount of material for story creation.

The beginning components of Extending the Dialogue should progress in the 6-8 weeks after the first two components. Driving the Sales Process will be an ongoing effort with the operational process components happening concurrently with Extending the Dialogue.

Expected Outcomes

The District's goal for this business development program is to gain partnerships and support with local companies that could reach into the millions of dollars per year. Making certain the foundations are in place to leverage the opportunity is critical.

The District should expect to have key components of the development process locked in and ready for them to utilize as they need. They should also expect a resource that will provide them with ongoing sales process guidance to help them in areas they might not have the deepest of expertise.

About Infinity Systems

Infinity Systems is the right choice for the District in this effort because of its experience and expertise connecting how organizational alignment impacts organizations across multiple industries and its communication and sales experience telling the alignment journey story.

Infinity Systems has a track record of working with educational institutions, corporations and governmental entities around organizational alignment. We've worked with organizations to embed alignment concepts into daily activities through their main asset, their human capital, with strong results.

The individuals that will be involved in this project have extensive experience in education, marketing, sales management and partnership arrangements.

Proposed Fee

For the services listed above, Infinity Systems proposes a flat fee for the foundational components of the proposal and a monthly retainer for the ongoing sales funnel coaching.



Disengaged



Satisfied



Engaged



Aligned

For the foundational components of each category, Infinity Systems proposes a flat fee of \$30,000 to complete the tasks. For the sales funnel coaching, Infinity proposes a fee of \$1000 per month for a minimum of 6 months.

Outline, Timing and Expected Outcomes

Spring/Summer 2017

Historical Story Development and District Leadership Groundwork

Spring 2017 will be used to develop the baseline for Mountain View’s Alignment Journey story. We will look at quantitative and qualitative data to assess where the District was at before the Strategic plan as well as before and immediately after Infinity Systems started the Alignment process. Some interviews of key people will likely take place. This will set the Conflict and Commitment portion of our story.

Also, in conjunction with the Alignment Journey work done in the separate project, we will document the processes taken with the District Leadership team and track their progress through the summer and the upcoming school year.

Storytelling exploration

During the Spring and Summer, we will research where Dr. Rudolph will be able tell the District’s story in front of groups and make initial contact with perceived smaller value opportunities. The reasoning behind going after smaller value prospects is to provide the District with the opportunity to make mistakes and learn from the experiences. Also, Dr. Rudolph will be able to take a more collaborative tone with these audiences and to develop a much tighter message with that knowledge as well as with to have a more robust story to tell.

We will not have a real compelling story that will likely energize donor opportunities towards late 2017 and even 2018. However, if we can start the conversation with some, we can hone our message for when we really ramp up.

Framework for Extending the Dialogue

In conjunction with District employees and resources as part of the Alignment Journey project, a framework communication plan will be formulated to continue communicating with the people Dr. Rudolph meets with as well as other internal and external stakeholders.

Fall 2017

Internal communication plan

In connection with alignment journey efforts, communications to teachers and other staff about the Business Development initiative will be made with an ask to connect the district with prominent parents to identify and smooth the path towards getting in front of influential groups.

Story development and delivery



Disengaged



Satisfied



Engaged



Aligned

Initial presentations will be made during the fall from the work done in the summer. Some presentations will be to influencers (government) in order to get warm connections and to support general political efforts.

Lead identification and management

With any leads that come from early conversations, appropriate follow-ups will be made with the goal of identifying development opportunities and more connections. Account plans, if warranted, will be set up to determine courses of action by District employees.

Winter 2017/18

Storytelling implementation

As a compelling alignment story comes together, we'll look to engage identified groups that have the prospect for more valuable development opportunities.

At this point, we should be more confident in what has been done, initial impacts and course to be taken in the future. The District will be able to connect key Strategic Plan initiatives into the discussion to tease participants with opportunities for collaboration.

Internal prospect identification and communication

As teachers and staff become more comfortable with the alignment journey process and its impact on their lives, they should become more comfortable with the concept of connecting the District with parents and other network colleagues to engage in discussions about Alignment and Plan initiatives. These meetings could be done individually or within a Lunch-n-Learn/group meeting format to maximize resources and to serve as a networking opportunity for these parents.

There's a risk of starting this process too early. If teachers and staff haven't bought into the alignment journey enough, or haven't seen the impacts, they may be wary of taking this step.

Account planning and funnel management

There will be a volume of prospects in the development funnel from which to develop broad and individual communication and sales plans. Towards Spring 2018, significant discussions should be taking place at some level within appropriate companies.



Disengaged



Satisfied



Engaged



Aligned