

CONTINUING TO LEAD WITH RELEVANCE:
ALPHA CHI OMEGA



Alpha Chi Omega

REAL. STRONG. WOMEN.

RFP Response, February 10, 2017

Submitted to Erin Witt, Director of Marketing and Communications

trajectory

CONTENTS

Section	Page
<i>Building on Success</i>	3
<i>Current Situation</i>	4-5
<i>Program Deliverables</i>	6
<i>Program Workplan</i>	7-12
<i>Summary Timeline & Notes</i>	13
<i>Estimated Program Fees</i>	14
<i>Trajectory Profile</i>	15-16
<i>Case Studies</i>	17-23
<i>References</i>	24
<i>Agreement Terms</i>	25
Appendix:	
<i>Research Methodology</i>	27-28
<i>Select Client Testimonials</i>	29
<i>ACO 2009 Corporate Award Letter</i>	30

BUILDING ON SUCCESS

Under the most random of circumstances, we provided our first RFP response to Alpha Chi Omega on February 26, 2007. A collegiate member of your Marketing Task Force researched online and fortuitously submitted our name when you were seeking a partner to guide you through the organization's re-branding. Never did we imagine that two years later your National Council would unanimously honor Trajectory as the recipient of your Alpha Chi Omega Corporate Award.

Fast forward ten years, we're here again with an RFP to build on the work that we first did together. To continue to lead, and change, the conversation – and to continue to redefine “sorority.” And it's our great pleasure and honor to do so. Because our engagement with your organization truly remains the most fulfilling work we've ever done at Trajectory.

We've worked with many different types of organizations over the past 18 years on engagements that on paper, mirror this one. But that's where the similarities end. While our work together struck a deep chord with your organization, it did with ours as well. The passion, emotion and commitment of the Marketing Task Force and the leadership team was palpable from our first conversation and in every meeting we had together thereafter. And it culminated in our presentation of your (our) new Alpha Chi Omega brand at the National Convention in July of 2008.

We've never been the same since working with you. And we so look forward to this second time around. To hitting it out of the park together again. To reaffirming why Alpha Chi Omega so genuinely embodies the ideals of **Real. Strong. Women.** And to helping you drive the organization's strong growth trajectory even more so into the future.

Declaration of Our Shared Commitment

Let's Be Real

Someone needs to change the language. Change the conversation.

Change how women **think** and **act** about the idea of **sorority**.

We accept the challenge. By offering an experience that respects and responds to the **hopes, dreams, fears & realities** of today's women, in today's world.

At Alpha Chi Omega, **we are Real Women.**

Facing **Real Issues**. In the **Real World**.

On the one hand, **inspiring**. In turn, being **inspired**.

Transforming. And being **transformed**.

Together, creating a more **positive reality**, for ourselves and others.

We are Strong Women.

Strong in the **courage** of our convictions, the **confidence** in our actions and the **purpose in our hearts**.

To know us will be to experience a voice that is

respectful, genuine, open, empathetic & honest. Real.

We will define how a sorority will thrive, and be defined, **today and in the future.**

We are Real. Strong. Women.



Alpha Chi Omega

REAL. STRONG. WOMEN.

CURRENT SITUATION

Overall Engagement Goal. *Improve Alpha Chi Omega's (ACO's) brand and image in its community, eliminate brand/image confusion and refocus brand palette, imagery and messaging. Begin the process of educating, engaging and mobilizing by debuting new ACO brand at 2018 National Convention.*

Challenge. *To meet this goal, we'll address the following audience-based challenges:*

- *Appeal to potential volunteers and donors, and stay competitive among Panhellenic peers.*
- *Given source of continued growth, ensure brand is timely, relevant and appealing to core Panhellenic audience of young women (knowing there's strong affinity to existing ACO brand among this core target audience).*
- *Make adjustments and updates so ACO's existing brand continues to resonate with core audiences while appealing to potential new members and other external audiences, with a more modern look and feel.*

Note: Elements that will not change are Badge, Coat of Arms and Ritual Items, Lyre and Carnation, Tagline.

Prioritized ACO Community (Target Audience) Defined As:

- *Current collegiate/alumna members*
- *Donors*
- *Potential new members (collegiate women ages 18-22)*
- *Parents/families of prospective members*
- *University stakeholders*
- *Panhellenic/Greek community*
- *Potential alumna initiate members*

Problem Statements:

- *Branding, positioning and image need to align with strategic priorities and goals; while being flexible and adaptable for use in new and emerging marketing platforms.*
- *Significant confusion over existing messaging/sub-branding, specifically in regard to educational program branding under primary ACO umbrella brand.*
- *Dilution of the Alpha Chi Omega, Inc. brand (visual identity and messaging, in collateral) across Foundation, Fraternity and National Housing Corporation.*
- *Need to establish new guidelines for which PMS interpretation of organization's "scarlet" and "olive" should be used, in which properties, for which audiences, and create supporting style guides and graphic standards manuals (similar challenges in regard to typography).*

CURRENT SITUATION

Primary Objectives:

- *Structured approach to data gathering, research and analysis, and recommend strategies and guidelines on how best to communicate/market the Enterprise to all key demographic groups.*
- *Analyze current branding, marketing and imaging from both internal and external stakeholder points of view, and identify problem areas.*
- *Establish competitive, institutional branding/positioning/imaging.*
- *Review current logos and recommend updates/revisions, or create new visual imagery to better reflect brand promise.*
- *Create complementary logos for Foundation and National Housing Corporation that stress each entity's individual identity, while showing their connection to the Fraternity.*
- *Create new graphic, typographic and style standards with accompanying usage manual and resources.*
- *In addition to ACO's stated primary objectives, we would add leveraging Trajectory's vast experience of launching and relaunching brands to determine with ACO team priority elements that should be introduced at 2018 National Convention.*

Program Deliverables:

Are detailed on following page, along with accompanying phased workplan.

A few things to note about our workplan:

- *Our work is broken down into phases, each of which is predicated on a clear understanding of goals, scope and outcomes along with key decision-maker approvals and agreements coming out of each phase.*
- *Our distinct value to ACO is based, in-part, on...*
 - *our **M-Factors** approach to brand-building and marketing, created based on our belief that the most magnetic, fastest growing brands (irrespective of category) integrate eight characteristics and beliefs into their delivery, which need to be deliberately designed and carefully managed over time. Factors include Purpose, Differentiation, Authenticity, Energy, Emotional Pull, Alignment, Tribe and Symbolism.*
 - *our process of **Re-Framing**. To help clients see and think in new ways about challenges and help them to see new possibilities to grow smarter and stronger. We do this through seven status-quo busting questions that we integrate across our workplan.*
- *Our online project management software allows for simple, efficient, anytime, anywhere collaboration among our two teams. ACO team members will always have access to timelines, work-in-progress and approved strategic and creative documents.*

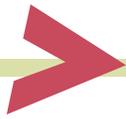
PROGRAM DELIVERABLES

Including, but not limited to the following:

Key Deliverables	Components
Project Plan	Providing specific dates for execution of each element below, including milestones for all services and deliverables
Positioning/Imaging/Brand Audit & Analysis	Internal and external analysis to determine comparative positioning/imaging/state of brand; includes planning, managing, fielding, reporting of formal research program (review of existing data, research, materials, plans included directly below)
Trajectory Review of Brand Assets	Review existing ACO logos, colors, fonts, style/usage guides, execution; recommend changes/updates to create cohesive look, feel and messaging under a new brand umbrella; includes review of existing data, research, materials, plans
New or Refreshed Logos	Redesign of ACO enterprise brand logo (whether refreshed or new) as well as associated entity logos (Fraternity, Foundation, NHC), program logos (e.g. Education) and chapter logos
Updates of New Brand Visual Assets	Recommended new color palettes, fonts/typography, graphics/iconography, etc. for each category of logo
Brand Standards	Graphic, typographic, style standards in electronic format (reference point being our 2008 version) with accompanying usage manual, resources
Partial List of Elements Envisioned As Part of Brand Identity Work	
Signature System*	Print and electronic letterhead, business cards, envelopes, PR releases, branded office resources, signage for ACO enterprise and entities
Social Media	Update of graphics (Facebook, Twitter, LinkedIn, YouTube, Pinterest, Instagram), digital assets
Logos	Complementary for three entities, as well as for educational programs; licensed logos for vendors and merchandise
Presentations*	New business proposal templates, extension marketing materials, presentation template, powerpoint design
Lyre Magazine	Graphical redesign (range of front cover and inside page designs for ultimate selection of one)
Balance of Collateral*	Program and education collateral, facilitation assets, newsletter templates for chapters (up to 10 new template designs; front covers and inside pages)
Website	Redesign of main website (hand-off of assets to/working alongside Kentico developer), coordinating chapter website templates
Video	Brand launch video: 1:30-2 minutes; to be repurposed for multiple uses (e.g. video bookends, cut-downs for social media, chapters, etc)

* These items to be redesigned following the elements deemed to be necessary for National Convention – including Logos, Website, Video, Lyre magazine, Social Media. Of course, subject to agreement with ACO program team.

ACO PROGRAM WORKPLAN



a. Assessment & Recommendations
(Aug - Oct. 2017)

b. Brand Design
(Nov 2017 - Feb 2018)

c. Brand Execution
(Mar - Apr 2018)

d. Internal Brand Launch
(May - June Convention)

e. Internal & External Roll-Out
(July 2018 Forward)

f. Ongoing Internal Engagement & Alignment

Goal: Analyze current branding, marketing and imaging both internally and externally, identify problem areas and recommend actions to be taken to focus perception, strengthen connections and attract new audiences.

Steps:

a. ACO Kick-Off Session & Internal Interviews: meet with Erin Witt and core team to review path forward, team member roles and responsibilities, etc. **as well as** conduct initial round of internal interviews among cross-section of key decision-makers and influencers to understand their individual perspectives, insights and ideas about this initiative (formal interview outline to be provided in advance). Assumes 15-20 interviews.

b. Balance of Internal Interviews: with key decision-makers and influencers, whether in-person or via telephone.

c. External Community Research: among ACO current members (Collegians and Alumnae) and prospective collegiate members and influencers (Parents, University Stakeholders, Panhellenic/Greek Community) to identify their perceptions about ACO branding and imaging. **Please note** that Trajectory is recommending an additional external audience of "Social Influencers", who can provide an important female perspective beyond the boundaries of sorority. Recommended methodology, rationale, timing and fees detailed in appendix. Culminates in report and presentation to ACO teams. Of course, research plan to be discussed in-depth so all agree on scope, methodology and effectiveness.

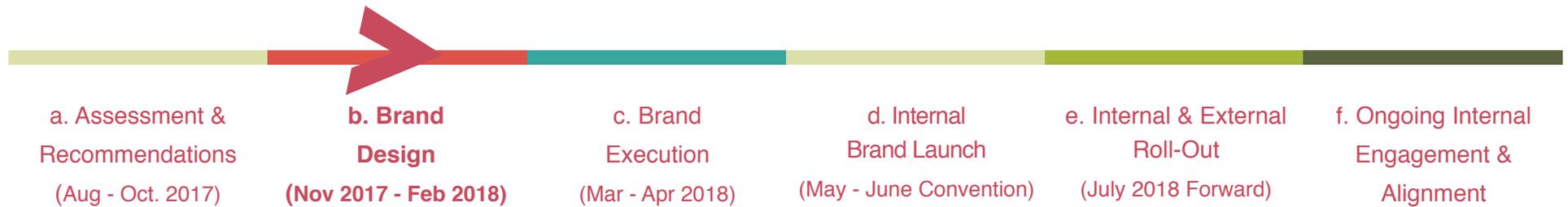
d. Visual Identity, Communications & Marketing Audit: comprehensive review of organization's **visual assets** (e.g. logos, color palettes, style of imagery, typography, etc.), **internal and external communications vehicles, key messaging** (both clarity and targeting) and **marketing**; across umbrella brand, the three organizations, programs and chapters – to consider how to make most impactful, distinguishing and consistent in light of updated branding. Report and presentation combined with external research report.

e. Competitor/Role Model Reviews: up to seven organizations (e.g. Tri Delta, Sigma Kappa, Delta Zeta, 1-2 other fraternal organizations, and balance outside ACO space), focusing on positioning, branding, key messaging, visual identity, marketing and communications. Report and presentation combined with external research report.

f. Assessment Report & Recommendations: presentation of key findings (steps c, d, e) and recommended strategies for branding, imaging and communicating/marketing the Enterprise to key demographic groups; presented first to core team and then to ACO National Council and CEO.

Note: Phases e. (Internal & External Roll-Out) and f. (Ongoing Internal Engagement & Alignment) are not part of your RFP request. However, they are critical post-launch activities pivotal to eventual success. As such, we briefly touch on these phases in this RFP and are happy to discuss our potential involvement at the appropriate time.

ACO PROGRAM WORKPLAN



Goal: More modern and relevant presence across ACO entities, programs, touchpoints. **Importantly,** priority should be to design and finalize the elements that we collectively think need to be revealed at June National Convention. For example, to complete a video for Convention, certain assets (e.g. logos) should be finalized and approved at least 8-10 weeks prior.

Steps:

a. ACO Logo: Starting with ACO Enterprise logo, creative brief for ACO team approval followed by logo exploration, presentation to core team, selection of 1-2 logos for additional refinements, and then presentation to leadership for final approval of one logo. Direction whether to refine or create a new logo to be informed by assessment recommendations.

b. Color Palette & Fonts/Typography: Based on selected logo, formalize the brand's primary/secondary colors and fonts/typography, to convey the appropriate personality of ACO across all visual expressions and mitigate dilution. Importantly, consider interpretation of "scarlet" and "olive" across properties and audiences.

c. Sub-Brand Organization Logo Treatments: That create a sense of individuality for each organization (Fraternity, Foundation, NHC), while tying them together as part of the ACO family. Design steps are similar to step a.

d. Program, Chapter Logo Treatments: Following same path as above.

e. Social Channels: Based on above (logos, color palette, fonts/typography, update of social media channel graphics and other digital assets).

f. Marketing Collateral: Based on Convention priorities, lead with redesign of Lyre magazine (sharing range of front cover and inside spread concepts for selection of 1-2 to take forward for revisions and then final selection of one), followed by program and education collateral.

g. Brand Video: Develop an approximately two minute video that strikes an emotional chord with all members and potential members, conveys the ambition and distinctiveness of ACO and can be repurposed for multiple uses. Includes storyboarding, research and collection of assets, production company bidding process, review and selection of music and voiceover, provision of all assets and layered files for post-production and editing, and management of production to produce final video, cut-downs and video bookends. Specific events & timing schedule to be provided to guide process.

h. Website: Redesign to reflect a more modern look and feel and engaging brand experience for ACO audiences. Based on discovery (navigational structure, user experience, etc.), develop a recommended sitemap and wireframe to guide redesign efforts. Upon approval, provide design options for the graphical user interface to enhance ACO's image and distinctiveness, with one concept to be selected for application across the website using the Kentico CMS platform. Content and SEO optimization opportunities evaluated for required revisions based on new website architecture and design. Redesign will result in an engaging, relevant, on-brand experience.

Note: Kentico is a proprietary CMS platform that relies on implementation capabilities of an approved Gold Level Partner. As such, we would ask ACO's implementation partner to assist with execution of new design in the Kentico CMS, including integration with the members-only iMIS EMS (Engagement Management System).

Note: Signature System, Presentations, Balance of Collateral: Given Convention priorities, to be developed (based on agreement) in following Brand Execution phase.

ACO PROGRAM WORKPLAN



Goal: Design and finalize the balance of elements deemed not critical to present at National Convention. As stated previously, we're totally flexible per direction of Erin and team.

Steps:

a. Signature System (print and electronic letterhead, business cards, envelopes, PR releases, branded office resources, signage): New designs informed by updated ACO logo, entity logos, program logos and associated color palettes, fonts/typography. Initial work to begin with ACO enterprise, with three different system designs (first demonstrated on letterhead and business cards) for selection of one to take forward and adapt across balance of applications. Design of entity and program signature systems to follow this same path and closely mirror same design.

b. Presentations (new business proposal templates, extension marketing materials, presentation template, powerpoint design): Informed by above, develop three different "family" design systems (demonstrated on front cover and inside pages) for each of the above "presentations." Based on feedback, finalize chosen design to take forward.

c. Balance of Collateral (program and education material, facilitation assets, newsletter templates for chapters) follows same design development process as above.

d. Brand Standards Manual: Develop version 2.0 of our initial Standards Manual to ensure consistent treatment of brand identity elements across all channels, vehicles and audiences (e.g. logos, colors, fonts, graphics, style of photography, formats, etc.). Initiated with content outline for ACO approval prior to start of work.

e. Brand Book (beyond RFP, for ACO consideration): More strategic in nature than the Brand Standards Manual, the brand book will reinforce in a simple, visually compelling manner the important ideas behind the Alpha Chi Omega brand. While the Standards Manual captures the mind and gains behavior, the Brand Book is designed to capture the heart and gain commitment. It will capture what makes Alpha Chi Omega special and provide some easy tools to help all members articulate and express the brand on a daily basis – so that everyone speaks with one voice.

f. National Convention Deliverables: Final confirm all the creative elements to be shared at National Convention, so no items are overlooked and development can begin as early as possible.

ACO PROGRAM WORKPLAN



Goal: Begin to socialize your reenergized Alpha Chi Omega brand, both pre-and-post convention.

Steps:

a. Pre-Convention: Finalize all elements to be shared at Convention. Coordinate all moving parts with core team members. Meet with key internal stakeholders (decision-makers and influencers) to share updated brand prior to exposure by all Convention attendees.

b. Convention: Goals should be to **begin to** educate, excite and mobilize all attendees around new brand ideas and execution. As feasible, we recommend integrating attendee participation alongside leadership speeches and presentations, e.g. brand immersion workshops.

ACO PROGRAM WORKPLAN



Not part of our program, but for your consideration.

Goal: Foster ACO key audience connection with your new brand:

- Current collegiate/alumna members
- Donors
- Potential new members (collegiate women ages 18-22)
- Parents/families of prospective members
- University stakeholders
- Panhellenic/Greek community
- Potential alumna initiate members

Objectives: Assist audiences to:

- Rationally understand new brand ideas
- Believe in new brand ideas
- Emotionally connect with new brand ideas

Strategy:

Map each key audience's touchpoint journey to ACO and develop a go-to-market program that engages each of them on their terms. We would be thrilled to assist in concepting and development (as requested); whether traditional, digital/web, PR, social, mobile, search.

*Note: we're pleased to share more thinking about our **M-Factors** approach to brand-building and marketing. Created based on our belief that the most magnetic, fastest growing brands integrate eight characteristics and beliefs into their delivery, which need to be deliberately designed and carefully managed over time. Factors include Purpose, Differentiation, Authenticity, Energy, Emotional Pull, Alignment, Tribe and Symbolism.*

ACO PROGRAM WORKPLAN



Not part of our program, but for your consideration.

Goal: Build brand momentum from the inside out.

Objectives:

- Keep brand front and center
- Reinforce strategic importance of this initiative
- Ensure members are emotionally connected, equipped and aligned to deliver on brand promises
- And referring back to overall program goal, eliminate brand/image confusion and refocus brand palette, imagery and messaging.

Strategies: To be determined, but might consist of, e.g.,

- Top-down and bottom-up brand ambassadorship
- Creation of cross-functional/cross-generational “brand champion” team
- Ongoing “brand-reminder” communications
- Workshops and Webinars
- Recognition and rewards

We would be thrilled to discuss at the appropriate time how we can assist with your efforts to build brand value from the inside out.

SUMMARY TIMELINE & NOTES

Phase	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
Assessment, Findings & Strategy Recco's												
Brand Design												
Design Execution												
Internal Launch												
Internal/ External Roll-Out (TBD)												
Ongoing Engagement/ Alignment (TBD)												

Notes:

- *Assessment, Findings & Strategy Recco's (Aug-Oct 2017): Culminates in formal presentation of all research findings, strategy recommendations and agreements prior to proceeding to next phase.*
- *Brand Design (Nov 2017- Feb 2018): As agreed with core team, should begin with those elements deemed most important to share at National Convention.*
- *Design Execution (Mar-Apr 2018): Balance of elements not deemed critical to share at Convention; at same time, working on Convention deliverables per team agreement.*
- *Internal Launch (May-Jun 2018): Developing all elements to be shared at Convention, sharing approved work with key decision-makers and influencers prior to Convention, and debuting new brand at Convention.*
- *Internal/External Roll-Out (July forward): not included as part of this program, but for your consideration.*
- *Ongoing Engagement & Alignment (July forward): as per above.*

ESTIMATED PROGRAM FEES

Including, but not limited to the following:

Deliverables	Components	Estimated Fee**
Project Plan	Providing specific dates for execution of each element below, including milestones for all services and deliverables.	n/c
Positioning/Imaging/Brand Audit & Analysis	Formal internal and external research to determine comparative positioning/imaging/state of brand; includes planning, managing, fielding, reporting. Supported by review of existing data, research, materials, strategic and marketing plans.	Formal external research: \$130k-\$150k (detailed in appendix)
Trajectory Audit of Brand Visual Assets	Review current ACO logos, colors, fonts, style/usage guides; recommend changes/updates to create and communicate a cohesive look and feel under a new brand umbrella (taking account above referenced existing data, research, materials, plans).	Internal analysis: \$30,000 (Report & Presentation combined with above research)
New or Refreshed Logos	Redesign of ACO enterprise brand logo (whether refreshed or new) as well as associated entity logos (Fraternity, Foundation, NHC), program logos (e.g. Education) and chapter logos.	\$20,000-\$30,000
Updates of new brand visual assets	Recommended new color palettes, fonts/typography, graphics/iconography, etc. for each category of logo.	\$10,000-\$15,000
Brand Standards	Graphic, typographic, style standards in electronic format (updated from our 2008 version) with accompanying usage manual and resources.	\$25,000-\$35,000
Partial List of Elements Envisioned As Part of BI Work		
Signature System*	Print and electronic letterhead, business cards, envelopes, PR releases, branded office resources, signage for ACO enterprise and entities.	\$10,000-\$15,000
Social Media/Digital Assets	Update of graphics (Facebook, Twitter, LinkedIn, YouTube, Pinterest, Instagram), digital assets.	\$2,000-\$5,000
Logos	Complementary for three entities, as well as for educational programs; licensed logos for vendors and merchandise.	included in above "New or Refreshed Logos"
Presentations*	New business proposal templates, extension marketing materials, presentation template, powerpoint design.	\$5,000-\$10,000
Lyre Magazine	Graphical redesign (range of front cover and inside page designs for ultimate selection of one).	\$10,000-\$15,000
Balance of Collateral*	Program and education collateral, facilitation assets, newsletter templates for chapters (up to 10 new template designs; front covers and inside pages).	\$20,000-\$30,000
Website	Redesign of main website (hand-off of assets to, and collaborating with, Kentico developer), coordinating chapter website templates.	\$25,000-\$35,000
Video	Brand launch video: 1:30-2 minutes; to be repurposed for multiple uses (e.g. video bookends, cut-downs for social media, chapters, etc)	\$35,000-\$45,000
	<i>Estimated Fee Total</i>	\$322k - \$415k including formal research; \$192k - \$265k excluding

* These items to be redesigned following the elements deemed to be necessary for National Convention – including Logos, Website, Video, Lyre magazine, Social Media. Of course, subject to agreement with ACO program team.

** Extent of redesign contingent upon recommendations from formal external research and brand visual assets analysis, e.g. new ACO enterprise logo vs. refined logo.

TRAJECTORY PROFILE

Who We Are: Founded in 1999, we're a brand and marketing agency (and a certified State of New Jersey WBE) whose mission is to change the trajectory of brands and businesses.

What We Do. As trajectory is a function of momentum and direction, we help clients tackle today's challenges and plan for tomorrow's opportunities. Ultimately, our work creates stronger brands, bonds and businesses.

How We Do It. Through strategy, planning, branding, experience, communications and engagement. Overlaying our **M-Factors™** playbook. Aligned around principles of relentless curiosity, proactivity, being challengers (vs. challenging) and taking ownership and stewardship (treating our client's business as if it were our own).

Why Us. We bring deep understanding and experience to every client engagement. But we combine our expertise with new ways of looking at challenges and helping clients see new possibilities to drive smarter and stronger growth. What we refer to as **Re-Frame**.

Challenges We Solve:

- Research & Insights
- Differentiation
- Unifying brand
- Launching new products and services
- Entering new markets
- Rejuvenating brands
- Driving smarter and stronger growth

Clients: Span non-profits, health and wellness, consumer products, leisure/sports, B2B

Partner Companies: Media Planning & Buying (Harmelin Media), Digital Back-End Development (Beeay), Research (ThinkPiece)

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TRAJECTORY PROFILE

Leadership Staff for ACO Team

Your ACO team is led by former senior executives from leading consultancies, clients and agencies. This experience allows us to tackle strategic issues beyond the scope of many other agencies, and also translates to creative firepower and client results.

Eric Brody, President

ACO Role: Similar to first 2008 ACO brand initiative – brand strategy lead, engagement oversight, strategic collaboration, attend all key meetings

Prior experience

Consulting: EVP/Management Board, Interbrand (world's most influential brand consultancy); President, Sawtooth Branding

Client-Side Brand Management: L'Oreal, Beiersdorf Inc.

Advertising: Benton & Bowles, Marschalk

Randi Brody, Co-President

ACO Role: Similar to first 2008 ACO brand initiative – marketing leadership and day-to-day oversight of ACO, attend all key meetings

Prior experience:

Advertising/Direct Marketing: EVP Planning & Account Management Chinnici (bought by Margeotes)

Client-Side: SVP CIT (hired to start retail division which she grew to \$500MM), SVP Citibank, HBO Marketing Mgm't

Tom Teska, Creative Director

ACO Role: Actively lead ACO creative team, inspire great creative, present at all "creative deliverable" meetings

Prior experience:

Advertising: ACD Source Communications, CD Triton Advertising, Copywriter Bozell

Michelle York, Account Supervisor

ACO Role: Works alongside co-president to manage ACO day-to-day activities and program components

Prior experience:

Digital Marketing, Sales and Social Media for non-profits, start-ups and grassroots organizations

Rajni Dhanjani, Account Supervisor

ACO Role: Works alongside Michelle and co-president to manage ACO day-to-day activities and program components

Prior experience:

Strategic PR and Communications: Lazar Consulting

Client-Side: Mondelez, Kraft Foods

Alisha Carti (ThinkPiece), Research Partner

Role: Work alongside Trajectory to expertly stage, analyze and report our critical phase one external formal research

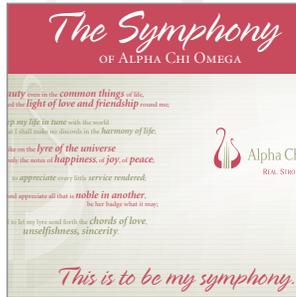
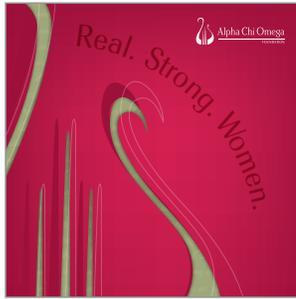
Experience:

Qualitative researcher and moderator since 1998 specializing in exploratory/category/brand understanding, senior qualitative moderator, RIVA trained moderator/RIVA trained analyst; Industry experience: cultural, B2B, consumer packaged goods, financial services, technology, entertainment

CASE STUDIES

Trajectory's six at-a-glance case studies span categories and types of organization (membership, cultural, health, association). But common across all of them, our work:

- Fundamentally impacted each organization – strategically, creatively, culturally.
- Involved strategy (e.g. vision, positioning, personality), concepting and design execution.
- Necessitated working alongside and building consensus among multiple stakeholder groups.
- Required educating, engaging and mobilizing internal teams as requisites to success.



Alpha Chi Omega: Brand Transformation & Engagement

Objective: Challenge the expectation about sorority by redefining “value” for prospective and current members.

Strategy: Partner with Board, leadership and Marketing Task Force to rebrand and relaunch your organization. Challenging the status quo to create new value (through our Re-Frame process), our efforts elevated the conversation about sorority, enhanced organizational relevancy and provided new avenues to meet the changing expectations of your diverse audiences.

Tactics: Full program of brand reinvention. Research, strategy (platform, tagline, architecture, messaging), design (logo, visual assets, launch video, website, etc.), internal culture, community (social media) and communications. Culminated in our emotionally-charged unveiling of new brand at 2008 National Convention. Commitment to the new brand was demonstrated by all attendees signing a 15’ banner containing the new ACO Declaration of Shared Commitment.

Impact: Measurable increases (as reported to us) in quality of brand awareness, brand engagement and member retention. YouTube video page views of 14.7k plus Facebook page with 8700+ fans.

“You hit the nail on the head with what you developed for us strategically and creatively. What you gave us is our organization’s culture, gravitas and collective personality. You have a fan in me, and hundreds of others, and I’ll be recommending you to any clients that need the special kind of magic that you deliver.”

— Leader, Re-Branding Marketing Task Force



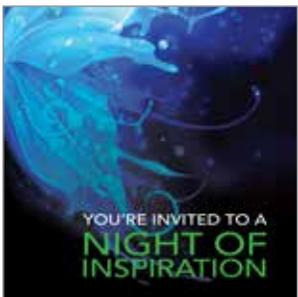
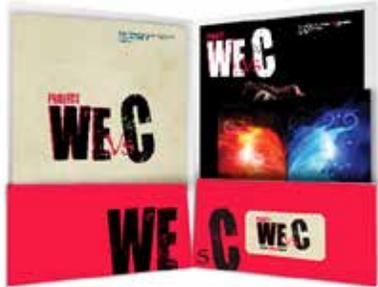
RWJBarnabas Health: Rallying Around a Cause

Objective: Unique 2-year campaign combining the powerful healing effects of song, dance, music and the arts – to highlight and support Robert Wood Johnson University Hospital Hamilton (RWJBarnabas Health) Cancer Services program.

Strategy: Develop a distinctive and compelling positioning, name and approach that reinforces the specialness of this initiative celebrating cancer patients, survivors, family members, friends and corporate partners of the hospital.

Tactics: Project WE vs C name and logo, creative concepting that marries edgy and provocative with hope, healing and transformation, long-form writing, offline and online launch materials, marketing roadmap and social media. Culminating around a 2017 “first-ever” event highlighting inspiring “Personal Stories of Triumph” ballet performances celebrating the unique and empowering stories of breast cancer survivors.

Impact: Measured through funds raised to save more lives through prevention, detection, treatment and ongoing support.



“It’s so nice to finally work with an agency who gets where we want to go strategically and creatively.”

— VP Marketing & Communications



Liberty Science Center: Re-invention and Relaunch

Objective: Relaunch the Center (one of the nation's most preeminent) following its transformational expansion, renovation and renewal.

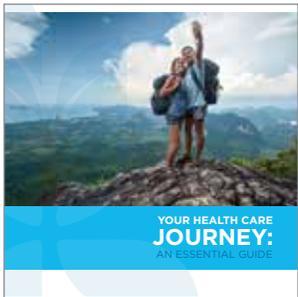
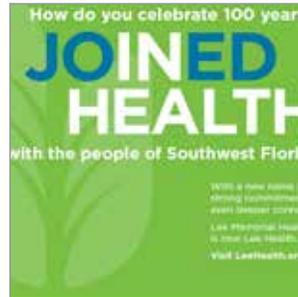
Strategy: A bold new "spectacularly invented" brand idea reflecting a promise of connecting audiences to the science and technology behind the opportunities and challenges faced by society.

Tactics: We first worked with Volunteer Board and Center Leadership on strategy direction and articulation. We then collaborated with internal teams to express the Center's new brand story across all design and communications and conducted brand-immersion workshops to ensure alignment of all staff in on-brand delivery. Ongoing marketing included targeted DM, email/CRM and local marketing activation.

Impact: Since re-opening, +30% increases vs. baseline in attendance and membership. Chosen by Parents Magazine as one of the Top 10 Science Centers in the United States.

"You always hit the strategic and creative bullseye. There are no mistakes, no surprises and you make us look good to the public, to our Board and others. While others talk this, you do it."

— VP Marketing



Lee Health: Rebranding

Objective: Enhance the relevancy of Lee Memorial Health System. Founded 100 years ago, now one of the largest public health systems in the country.

Strategy: Concurrent with its 100 year anniversary, partner with Lee Memorial Health System on its rebranding to Lee Health, as it transforms its approach from providing episodic health care to proactively “joining” with the people of Southwest Florida to live healthier lives.

Tactics: A multi-year internal and external effort involving and targeting board, physicians, employees, donors, business and local leaders and the community itself. Deliverables included:

- Internal Board and Senior Leadership Buy-In Sessions
- Research (community survey, competitor/role model reviews)
- Strategy (brand platform, naming, architecture, messaging, tagline)
- Design (logo, color palette, typography, stationery, signage, collateral, social)
- Internal Launch (messaging, teasers, video, brand book, guidelines, training)
- External Launch (TV, print, outdoor, digital, social media and business and community collaboration)

Impact: Community perception and understanding, customer acquisition (inquiries, utilization, retention), staff and physician engagement and key influencers support.

“The transition to our new brand during our 100th anniversary positions us for the future in encouraging and supporting health and wellness to the community we serve. Trajectory’s partnership and collaborative team was essential in this activity.”

— Chief Strategy Officer



Tri-Delta: Fat Talk Free Week

Objective: Raise awareness, ignite conversations and spark action around reversing the prevalent and damaging pursuit of the thin ideal by women.

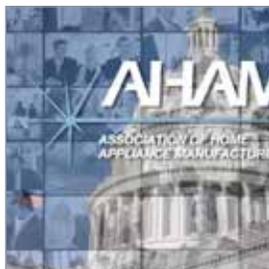
Strategy: Harness the power of Tri-Delta's Fat Talk Free Week story and cause – an international campaign that draws attention to body image issues and the damaging impact of “the thin ideal” on women – and compel action among the sorority community, general female audience population, partners, sponsors, donors and general population. Specific objective is nothing less than eliminating Fat Talk and changing the way women think about their bodies.

Tactics: Creative conceiving, video creative and production, action-oriented campaign microsite (e.g. visitors can share site, send personal emails with links, share site on other channels, sign “Promise Form”, sign-up for week of “Challenge Emails”, etc.), HTML brand emails, tracking and reporting.

Impact: Measurable increases in Fat Talk Free Week awareness and engagement: 29,000 site visits, 43,000 video views, 14,000+ YouTube shares, over 5% sign-ups for Promise Form.

“Tri Delta is very pleased with our overall campaign and our results. We also feel that this was a good collaboration with your Trajectory team – fantastic to work with, very detailed, professional and enjoyable”

—Campaign Leader



Association of Home Appliance Manufacturers: Rebranding

Objective: Re-energize the Association by reinforcing its value as the leading global member-based association for home appliance manufacturers; elevating its image for members, prospective members and key industry influencers.

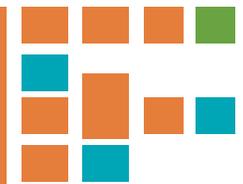
Strategy: Work alongside AHAM leadership and its member-based task force to develop and gain buy-in to new “Leading The Way” positioning, “Leadership•Knowledge•Innovation” brand identity themeline and follow-on visual identity.

Tactics: A program of internal and external research (members, potential members, government, industry analysts and consumers), brand story and positioning evolution, logo and tagline, messaging, design (stationery, collateral, newsletter, website, digital communications) and internal launch (workshops, guidelines, etc.).

Impact: Record member attendance at post-launch annual convention; across the board increases from members in association value measures (i.e. industry voice, forum for action, superior market knowledge, global product and focus, etc.).

“Trajectory’s partnership and collaboration has been essential to the development, acceptance and recognition of our new member-driven AHAM brand”

— Vice President Marketing



REFERENCES

Our three references are:

Jeanne Adam, Orlando Health, COO Marketing & Communications,
321-841-5923, Jeanne.Adam@orlandohealth.com

Jennifer Hirshfeld, Aquation Skincare Director of Marketing (prior role),
214-364-3001, jhirschfeld@global.t-bird.edu

Ann Valuch, Reading Health, Director of Marketing, 484-628-9090,
ann.valuch@readinghealth.org

AGREEMENT TERMS

Timing – Program phase include Trajectory development and ACO approvals. If timeframe is far exceeded (beyond Agency control), Trajectory has the right to revisit project scope and agency fees. ACO agrees to act in good faith to meet established timeframes.

Fee Payments – Trajectory will invoice our program 25% upon program initiation, with balance then spread evenly on a monthly basis over the course of our program. Research fees to be paid as invoiced.

Out-of-Pocket Expenses – Related to any necessary travel, lodging, color laser printouts, presentation materials, messengers, shipping, creative production (e.g. photography, illustration, retouching, etc.) or any other approved 3rd party vendor services, to be billed as expenses are incurred on a monthly basis.

Additional Work Requests – Outside the scope of this program will be reflected in proposal addendums, to be approved by ACO prior to start of additional work.

Editing of Agreement – This agreement may be changed as long as we both agree in writing to the changes to be made.

Program Termination – If this program is terminated with minimum of one-month advance formal written notice, ACO agrees to reimburse Trajectory for all pro rata fees and expenses incurred up until and through the time of termination.

Governing Laws – This agreement is made under and governed by the laws of New Jersey.

Acceptance

Please acknowledge acceptance of this agreement with your signature below. Thank you so much for your business.

Alpha Chi Omega



For Trajectory: Eric R. Brody, President

Date

02-10-17

Date



APPENDIX

RESEARCH PLAN: COMMENTARY

Goal: *Develop deep audience insights to guide improvement of Alpha Chi Omega's brand and image in its community, eliminate brand/image confusion and refocus brand palette, imagery and messaging.*

Objectives:

- *Understand how women see the world today and how young women think about their future.*
- *Motivations and commitments that drive women to consider a college sorority and how the decision is made.*
- *The view of ACO through the eyes of the target audiences they serve and impact.*
- *The message that audiences take away from current brand positioning, messaging and visual expression; including what works, what doesn't work and why.*

Perspective

*The key to a study such as this is the ability to **dig deep** into the experiences and perspectives of each respondent. Our customized approach provides a hybrid qualitative/quantitative methodology, which allows us to explore, uncover and discover relative to all program objectives, and provides rich and actionable insights to guide our next steps.*

*Quantitative research is constrained by the closed-ended questions that are asked, while qualitative research provides access to learning "what you don't know you don't know." You learn the **WHY** behind each opinion. Our approach combines the best of both worlds.*

Our specific methodology is designed to make a deep connection with each core audience – whether in person, or via tele-depth/tele-web – lending to deeper and richer learnings! Projective techniques will accent our in-person sessions, enhancing the questions and exercises we ask of our ACO audiences. In addition, once all fieldwork is complete, our actionable report

will fully capture the richness of our work, and ACO's story through concise language and visual communication.

Please be assured that our team offers precision and meticulous management when it comes to fielding a project of this nature. As a Team, we are also committed to collaborating through every step of the process!

Process:

- Planning: Kick-off meeting to set the stage and align on research objectives, address screening process and criteria, discussion guides, logistics, etc.*
- Fieldwork: Deep-dive, immersive hybrid qualitative/quantitative research among current members (chapter and alumnae), prospective members (students and parents) and key stakeholders (Internal, University, Greek Panhellenic). Please note that for additional perspective, we would also like to engage with a handful of "culture/social influencers."*
- Reporting: Detailed report in PowerPoint format; presentation in Indianapolis and (if requested) at June National Convention.*

Fieldwork Methodology

Combination of groups and one-on-one interviews.

Note: Additional Phase Two Check (if deemed necessary among most important current and prospective member audiences)

- *Prior to final approval of new branding work, designs can be tested in the field, for possible refinement and optimization before going live.*
- *To that end, a series of 30 telephone interviews (45 minutes each) can be conducted. Most efficient is recruiting participants from first phase of research.*
- *A rough initial estimate for this phase is \$30k-\$40k.*

RESEARCH PLAN: SPECIFIC DESIGN

Targets	Methodology	# Respondents	Rationale
Internal Stakeholders	1-on-1's with Board, Leadership, other key decision-makers and influencers; in-person or if necessary, via phone.	<ul style="list-style-type: none"> • 15-20 representatives; 60-minute in-depths 	Beyond the perspectives of these important stakeholders, engaging them early on will be pivotal to gaining buy-in throughout the process.
Existing Members			
Influential Chapters	<p>In-Person Immersion Focus Group discussions at the Sorority Houses or on Campus.</p> <p>Can utilize technology to create a virtual focus group facility backroom for ACO and Trajectory Team members.</p>	<ul style="list-style-type: none"> • 4 (2) hour sessions; 10-12 sisters/location (40-48 total) • Recruited for geographic representation, range of University and Chapter sizes and profiles • Could be chosen from 2016 award winners 	Utilize unique immersion ethnographic methodology to explore, uncover and discover rich insights – diving beneath the surface to uncover the emotional drivers behind ACO and its 'brand'.
Additional Chapter Members	Supplemental to above, online Bulletin Board discussions with current members.	<ul style="list-style-type: none"> • 10 individuals, 3 days each 	Complements in person sessions and allows us to increase our connections to support learnings and uncover deeper insights.
Alumnae <ul style="list-style-type: none"> • graduated within 10 yrs. • graduated 11-25 years ago • from chapters of different profiles/regions 	Conduct combination of Dyad Friendship Pairs via tele-web sessions (Skype or join.me.) and online Bulletin Board discussions.	<ul style="list-style-type: none"> • 16 Friendship Dyads, 60 Minutes (8 younger/8 older alumna) • 10 additional alumna via online Bulletin Board • 26 total 	Utilize Dyad dynamic to ascertain the real-life relationships of ACO sisters (while would like to do in-person, tele-web sessions will reduce travel and facility costs). Balance of alumna to then be interviewed (based on above) through Bulletin Boards.
Non-Members			
Prospective AXO Members & Parents	<p>In-person 'day in the life of' in-depth ethnographic sessions with prospective freshman pledges on campus, 90-minute sessions.</p> <p>Tele-depth sessions among their parents to complement all we uncover during the day-in-the-life IDIs/ethnos.</p> <p>Supplemental to above, Online Bulletin Board discussions with additional prospective pledges.</p>	<ul style="list-style-type: none"> • 16 In-depth interviews (8 ethnos with prospects, 90 Minutes; 8 tele-depth's with prospective pledge's parents, 60 Minutes) • 10 individuals, 3 days each 	<p>Understand what prospective freshman pledges truly look for in a sorority on rational and emotional levels.</p> <p>Parents will offer honesty and additional insight about what they look for in a sorority – communication, website, transparency, visuals, etc.</p> <p>Complements in person sessions and allows us to increase our connections to support learnings and uncover deeper insights.</p>
University Stakeholders	Conduct in-person sessions when we visit Influential Chapters, plus (2) additional tele-webs.	<ul style="list-style-type: none"> • 6, 45 minute interviews 	Decision-makers, influencers at college campuses where ACO is trying to expand via extension or recolonization.
Panhellenic Community	Tele-depth sessions	<ul style="list-style-type: none"> • 4, 45 minute interviews 	Peers who are collaborative, but competitive when comes to thought leadership, issues management, policies, marketing, etc.
Cultural/Social Influencers	Tele-depth sessions	<ul style="list-style-type: none"> • 4, 45 minute interviews 	Capture broader cultural/societal perspective beyond the sorority to augment learning and insights

Total Research Costs: Between \$130k-\$150k based on final methodology, target audience cells and # respondents. Includes all Mgm't Costs (discussion guides, prep work, screener development), Field Costs (recruiting, incentives, technology platforms, transcripts, incidentals), Moderating (field, TDI's, Bulletin Boards), Reporting Costs (report, results presentation at ACO HQ). Based on client discussions and agreements, final plan and all cost breakouts will be provided.

EXEMPLARY CLIENT TESTIMONIALS



“You hit the nail on the head with what you developed for us strategically and creatively. What you gave us is our organization’s culture, gravitas and collective personality. You have a fan in me, and hundreds of others, and I’ll be recommending you to any clients that need the special kind of magic that you deliver.”

– ACO Marketing Task Force Leader



“Thank you for Trajectory’s splended work. You have done an outstanding job blending respect for the past with gentle nudging of inherently sensible and winning ideas. Our brand is an emotional lightning rod for many, and you navigate it extraordinarily well.”

– Chairman Of The Board



“Of all the strategic and creative agencies we’ve worked with in the past, Trajectory is second to none. They’ve helped us achieve a number of our advertising and marketing goals, and their impressive work has helped us communicate in a memorable and consistent manner across all of our touch points.”

– Marketing Director



“Trajectory was a wonderful brand partner, both strategically and creatively, as we reinvented our brand. Their strategic know-how and guidance, from brand platform through to brand identity formation, helped us to push the boundaries and deliver strong results. Their partnership has truly revitalized eclipse, and we look forward to tremendous sales momentum..”

– Head of Business Development & Mktg.



“You always hit the strategic and creative bullseye. There are no mistakes, no surprises and you make us look good to the public, our Board, members and others. While others talk this, you do it.”

– VP Marketing



“In 25 years of marketing, I’ve never witnessed a better orchestration of staff and outside resources to reach an organization’s ambitious goals. Trajectory has been an outstanding partner and an enormous contributor to our resounding success. Over two years, they’ve worked hand-in-hand with our leaders and teams — on branding and marketing — and never missed a beat.”

– VP, Strategic Comm. & Marketing



Alpha Chi Omega

REAL. STRONG. WOMEN.

October 12, 2009

Eric Brody
President
Trajectory LLC
20 Community Place
Morristown, NJ 07960

Hello Eric,

On February 26, 2007 we received your response to Alpha Chi Omega's RFP seeking a partner to guide us through the brand development process. No one from our leadership team was familiar with your company. No one from the Marketing Task Force (MTF), charged with recommending finalists in this process, was familiar with your work. No one had a conscious connection to Trajectory even as close as the six degrees we may find ourselves from Kevin Bacon. The initial connection was random. A collegiate member of the MTF who had no working experience wanted to make a contribution, so she went online and did her research. Trajectory was a name she submitted to the team, and quite frankly, a shot in the dark!

When we submitted the RFP, our expectations to receive a response were not high. Then we got a phone call. It was you asking clarifying questions. Then we got another phone call. It was you asking more clarifying questions. Then we got yet another phone call....well, you know who it was! Our expectations for a response elevated. And on February 26, 2007 when you submitted your response, we began a journey into a new partnership that would not only meet but exceed our expectations. It reinforced the idea that we can stand out in a world where our competitors are selling the same benefits.

We have been impressed not only by the process of identifying how we can uniquely position our organization, but also by the excitement this process has generated within our organization. With your guidance we have discovered not who we want to be, but who we have been since 1885.

5939 Castle Creek Parkway • North Drive • Indianapolis, IN 46250 • alphachiomega.org

Throughout the past three years you have pushed us. And we often pushed back. Whether we agreed with your ideas or not, we always respected the expertise and never doubted the validity of the advice we received. Now that we have done the research, the communications audit, developed identity guidelines, conducted the brand rollout and most recently launched a web site, we can look back in confidence knowing we selected the exact right partner to lead us through this process. Your commitment to Alpha Chi Omega is appreciated.

To honor your commitment and service, our National Council unanimously selected Trajectory as the recipient of the 2010 Alpha Chi Omega Corporate Award. This award, presented in convention years, was created to recognize the outstanding efforts of our corporate partners and their benefit to our organization. There is no doubt that Trajectory is more than worthy of this recognition.

We hope you can join us to receive this honor during our 2010 convention which will take place July 9-12 at the Marriott Crystal Gateway in Arlington, VA. As our schedule is confirmed, we will provide more specific information regarding the day and time of the presentation. Trajectory means a great deal to our organization and we really want to celebrate all that you have brought to us through your incredible work. Congratulations and we look forward to hearing from you.

With warmest regards,

Cheri E. O'Neill
Executive Director

Janine Grover
Marketing & Communications Director

trajectory

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