



July 6, 2022

## Self-Managed CEO Analytics Package

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The Self-Managed CEO Package is a great alternative for small businesses or solopreneurs who want to understand why customers choose them and then use the business intelligence to expand their business. In the next few pages, we will guide you through the entire package.

Please note that this document, when executed, is a formal, binding contract for service delivery.

### Your Self-Managed CEO Analytics Package – Instructions

1. Please read carefully and make sure to fill out all the information accurately
2. When finished, email this entire document –either in Word or PDF format to [msalup@ceo-analytics.com](mailto:msalup@ceo-analytics.com)
3. We will email you back a countersigned confirmation of this brief and any questions we might have to make sure that our work is as successful as possible

### Basic Product Description

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CEO Analytics combines the sophisticated statistical tool of Disassociated Conjoint Analysis with proprietary algorithms to give our clients the real understanding of why their customers choose them. We do this via a unique signature survey that eliminates all biases. We deliver our business intelligence via a custom-made dashboard.

The Self-Managed package allows you, as a business owner, to select the demographic variables and product/service attributes that your experience shows to be key in moving your business forward, on your own. CEO Analytics will use the information you provide to create the survey, accumulate the data and create the dashboard.

### Core Features

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While this package is self-managed, you still get the core features that make CEO Analytics the most powerful tool to determine the why of your business:

- Choice of up to 8 demographic variables
- Choice of 6 product/business attributes
- Professionally made custom survey
- Professionally made custom dashboard
- Dashboard with constant updating as new completed surveys come in
- Training on using your custom dashboard (2 sessions)

All for an amazingly low cost and with total control

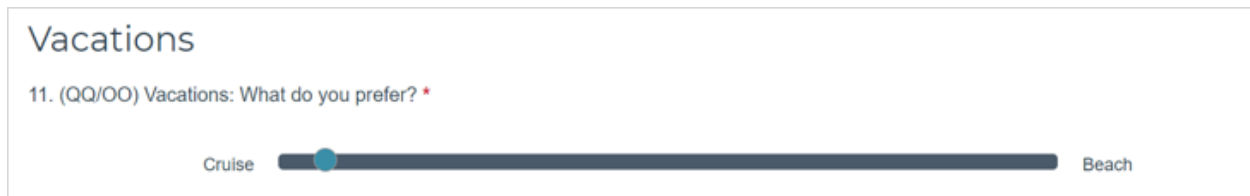
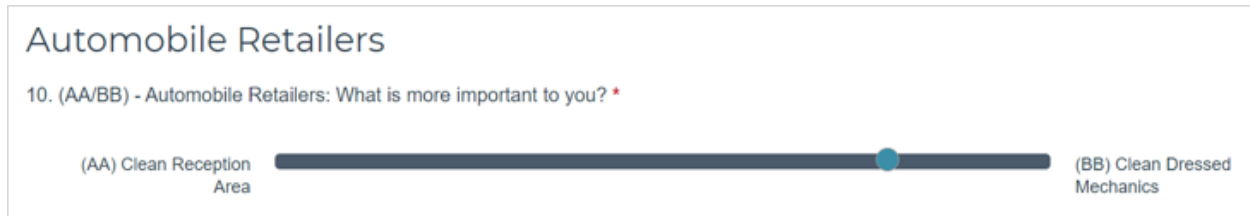
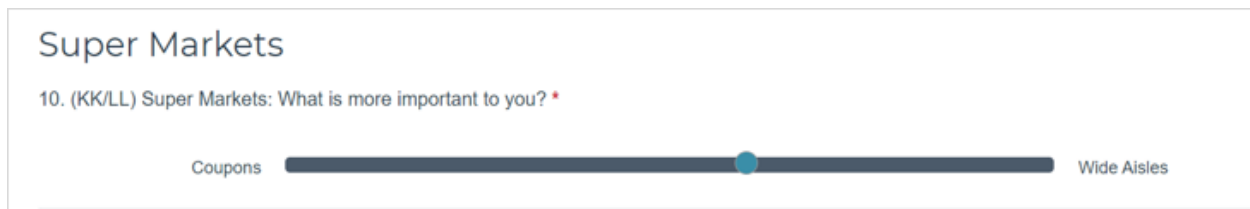
## What does your self-managed package include?

The Self-Managed Package is designed to give your company powerful actionable insights that will help you increase revenues.

### 1. Custom-made survey

After confirming your choice of demographic variables and product/business attributes, we will create a customized survey. You can see one here: <https://survey.alchemer.com/s3/6498250/CEO-Analytics-Sample-Survey> The survey will force-answer all the demographic variable and present the combination of product attributes in random pairs one by one.

These are some examples of how the product attributes are presented:



We test each survey not only for quality, but also for duration. Each survey presents enough demographic and attitudinal questions to make it last less than 3 minutes.

### Your survey includes your logo, which we will need as a JPEG or PNG

If you choose to incentivize responses via a gift (e.g., a gift card) we will collect that information and forward it to you for inclusion in your database. Please note that respondents have not opted in to receive information from your business, so CAN-SPAM regulations apply.

### 2. Survey Link

We create a link and a QR code that will channel all responses to our software.



### 3. Dashboard

While we are in the process of collecting responses, we will create your dashboard. Here is an example of one dashboard:

<https://app.powerbi.com/view?r=eyJrIjojInZQyNWWRiNzQtYzk3ZS00M2ZmLWFIYTgtZjRiZDlzN2Y0YzM2liwidCI6ImEzZDFINzgxLWYyZTQtNDMwOC1hYWRRhLWY5YjA4ODdjZTdkMyIsImMiOiN9&pageName=ReportSection496ccbfd41b704af71>

Typically, most dashboards follow a very standard architecture:

- A demographics page where the sample information is stored.
- Charts that track the variables and allow you to form your own view of the data
- Graphs that visualize the data

In the following pages there is ample room to explain your business drivers and key concerns so we can create a dashboard that will leverage all this business intelligence as much as possible.

The dashboard is actualized as follows:

1. When we receive 100 completed surveys we will present the dashboard and data as well as go through the instructions of how to use it.
2. Weekly thereafter for the remainder of the Self-Managed Package contract: 300 responses or 3 months whichever comes first.

### 4. Hands-on instructions for your dashboard

Because the dashboard is actualized every week and there is a huge amount of data that can be extracted, we do not prepare reports. We teach you and your team to use the dashboard.

In summary, your Self-Managed Package includes:

1. A survey customized to your business needs
2. A live link to publish in order to collect data
3. Data collection through the entire period of your contract
4. Customized dashboard
5. Up to two sessions on how to extract all the business intelligence possible from your data

## What happens now?

### Step 1 - Understand

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#### #1 – Information

- We will ask you some basic information about you, your company, your products and your competitors.
- You will choose up to 8 demographic variables that drive your business from a list of 15
- You will write in 6 product/business attributes in descending order of importance.
- You will then pay \$1,667 or 1/3 of the \$5,000 project fee

**#2 – CEO will create and test the survey** and send you the live link to publish it. *(For information on how the survey works see **"How does the CEO survey work?"** below)*

- The next payment of \$1,667 or 1/3 of the \$5,000 project fee is due

**#3 – You and your team publish the link** across all your customer touchpoints. These touchpoints include, but are not limited to:

- Website
- Social media
- Print (CEO Analytics will generate a QR code)
- In-store posters, table-top displays
- Newsletters

We can help you and/or your team to publish them on a consistent basis. (See **"Get the Most out of your Survey"** below). **This is a very critical step and you and your team needs to manage this for the best results.** (Please note that, as a service to some of our clients who request it, we can manage your social-media postings for \$99/month)

#### #4 – CEO collects surveys

- Survey collection is automatic, and you do not have to do anything about it, except publish the link as agreed as mentioned above.
- We will prepare the 1<sup>st</sup> preliminary report and deliver your dashboard when the first 100 completed surveys are in
- We will deliver the final installment of the data when either 300 completed surveys are in or three months have elapsed, whichever comes first

#### #5 – Dashboard and Training

- The Self-Managed package, like all our packages, includes a custom dashboard.
- The dashboard is delivered when the first 100 completed surveys are in and continues to be updated on a weekly basis for the duration of your contract
- The dashboard is the tool we use to visualize the data by any of the variables included in the research (e.g., age groups) as well as segment the data by target groups (e.g., Women 19-44)
- We train you and your team in the use of the dashboard over Zoom. There is no pre-set length of the call, as we want to make sure you get the most value for your investment



## Step 2 – Create

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### Section 1 – Company information

Your Name [Click or tap here to enter text.](#)

Your company [Click or tap here to enter text.](#)

Your position [Click or tap here to enter text.](#)

Your office phone [Click or tap here to enter text.](#)

Cell Phone [Click or tap here to enter text.](#)

Professional email address [Click or tap here to enter text.](#)

Personal email address [Click or tap here to enter text.](#)

Please explain what your company/brand/product does [Click or tap here to enter text.](#)

Who are your three main competitors [Click or tap here to enter text.](#)

What is/are your key competitive advantage(s) [Click or tap here to enter text.](#)

Please write on the space below any other information which you think is useful in improving your business results

Please check this box to certify that you can proceed on behalf of your company



**Section 2 – Your Survey**

Please choose up to 8 demographic factors from this list

Demographic Factor	Demographic Factor	Demographic Factor
<input type="checkbox"/> Gender (Male, Female, rather not answer)	<input type="checkbox"/> Age (<18, 19-24, 25-34, 35-44, 45-54, 55-64, 65+)	<input type="checkbox"/> Child <18 Living at Home
<input type="checkbox"/> Race (White, Black, Asian, Other)	<input type="checkbox"/> Ethnicity (Hispanic, Other)	<input type="checkbox"/> Education (Finished High School, Some College, Finished College, Post Graduate Degree)
<input type="checkbox"/> Marital Status (Married, Single, Divorced, Other)	<input type="checkbox"/> Employment Status (Full Time, Part Time, Student, Self-employed, Unemployed, Retired, Rather not answer)	<input type="checkbox"/> Job Seniority (Owner, C-Level, VP, Director, Manager, Clerical, Hourly, Other)
<input type="checkbox"/> Company Size (1, 2-10, 11-50, 51-500, 501+)	<input type="checkbox"/> Job Sector/Industry (Drop down menu)	<input type="checkbox"/> Zip Code (Open Field)
<input type="checkbox"/> State (Drop Down Menu)	<input type="checkbox"/> Country (Drop Down Menu)	

Please write in 6 product/business attributes that you estimate drive customers (e.g., price, location, quality of materials, promotional activities, etc.) preferably in the descending order of importance.

Attribute
#1 -
#2 -
#3 -
#4 -
#5 -
#6 -

Note: Please double check the attributes as they will be the final ones included in the survey and can't be changed once the survey begins

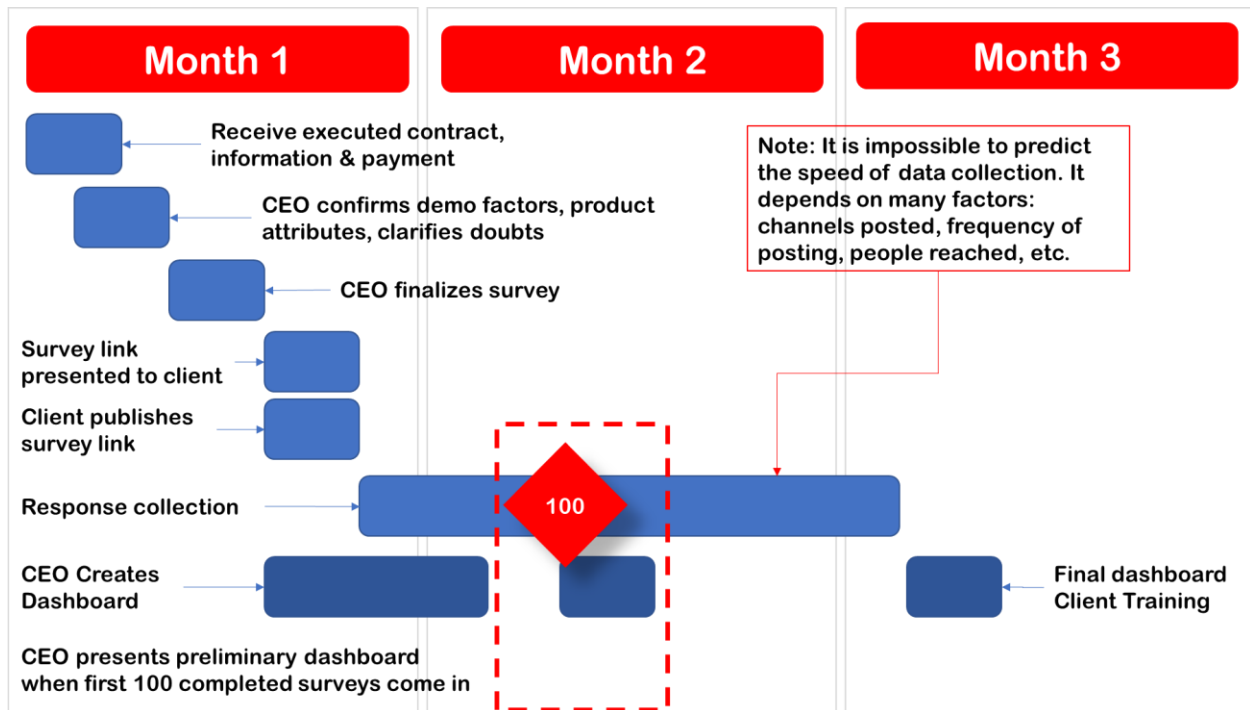


**Authorization:** As an authorized representative of (Company) [Click or tap here to enter text.](#), I, (Name) [Click or tap here to enter text.](#) authorize CEO Analytics to create the survey and dashboards as outlined in the Self-Managed Package described above.

I understand that as part of the Self-Managed Package, CEO Analytics will create and develop the survey and dashboard based on the input that it receives from (Company) [Click or tap here to enter text.](#) and that (Company) [Click or tap here to enter text.](#) assumes full responsibility for the correct selection of variables and product features.

- I've checked the demographic attributes
- I've checked the product/business attributes
- I have read the entire document, filled out the requested information accurately and completely and agree with the entire document

### Step 3 – Timeline



The Self-Managed Package is for 300 completed surveys or 3 months, whichever happens first. The moment we have 100 completed surveys, we will present you with the dashboard and the data. At that point, we will have a training session for the Client team.

At that point the dashboard is updated weekly with however many surveys have come in. We will also track –if possible— which channels are producing more surveys if the data is available.

When either 300 completed surveys have been reached or at the end of 3 months, whichever happens first, we will present the final data and dashboard. At that point, we will arrange for the second training session.





## Step 4 – Payment

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Cost: \$5,000 payable in 3 installments as follows:

- \$1,667 with the signature of the purchase order
- \$1,667 with the delivery of the survey link.
- \$1,667 with the delivery of the 300 completed surveys or at the end of 3 months, whatever comes first

I agree to payment in full as per the specified conditions above

We will invoice the company at each stage.

Please call if you have any questions or doubts: Marcelo Salup, 305-215-7229

## The Fine Print

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**This is a legally binding contract;** CEO Analytics will not admit cancellations and does not give refunds on the first payment. Client may cancel within 7 days and obtain a full refund of the 2<sup>nd</sup> and 3<sup>rd</sup> payment

**The information and analysis generated by CEO,** its surveys, dashboard and other tools and resources is strictly for the use of the Client. The information and analysis are licensed in perpetuity and without limits to the Client. It may not be used for another company, resold or otherwise repurposed. Small sections of the information and/or analysis may be used by the client for information purposes. If used for that purpose, it must be credited to CEO Analytics.

**Choice of Law and Jurisdiction.** Florida law, without regard to its choice-of-law provisions, governs this Agreement. The parties shall attempt in good faith to resolve informally and promptly any dispute that arises under this Agreement. If unsuccessful, we both agree that, in case of a dispute, we will first engage in arbitration. The cost of arbitration and of any subsequent legal action will be borne by the losing entity. Jurisdiction for any legal action arising from this Agreement shall exclusively reside in state or federal courts located in Florida, and the parties hereby consent to the jurisdiction of such courts.

**Client agrees not to disclose any of the following:**

- Information about how CEO Analytics creates its surveys
- Information about how CEO Analytics creates its dashboards
- Any document forwarded to Client and which is marked confidential

Damages: We both agree that any reselling or repurposing of the information and analysis created by CEO Analytics as well as any disclosure of CEO's confidential and proprietary information will create a damage for which CEO Analytics may sue to recover money and other compensation.

I agree these Terms of Use, Description and Conditions

\_\_\_\_\_  
Name:

\_\_\_\_\_  
Marcelo Salup

Position:

Principal

Company:

CEO Analytics, LLC

Date \_\_\_\_\_

Date \_\_\_\_\_

**By executing this contract, you certify that you can bind your company into a contract.**



# Appendix

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## Get the most out of your CEO Survey!

### Two keys to success

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1. The main success factor for a survey is **the number of responses**. The more responses we get, the better the quality of the data and its insights and the more accurate it is.
2. The CEO Survey is not meant to be an “establishment” survey. Its only goal is unearthing deep, actionable insights for your business that will help you increase revenues.

### The CEO Survey Link:

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Once we finish creating the survey itself, **we will be emailing you a link to the survey**. The client is responsible for this most important part of the process. The company must publish the link in as many customer contact points as possible.

The link can be inserted anywhere: website, social media, newsletters, etc. We can also provide a QR code for use in printed materials: posters, table-top and counter-top tents and signs, sales materials, cash register receipts and more.

### Goal

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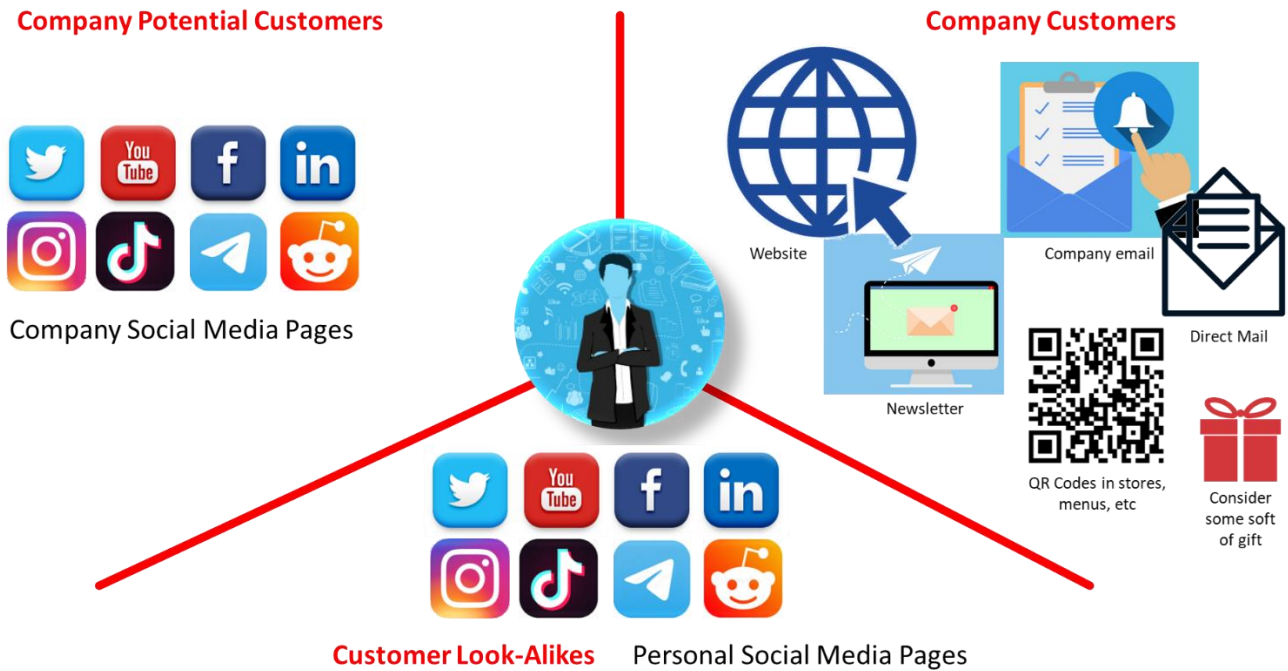
The overriding objective at this stage is achieving as many completed surveys as fast as possible. To achieve this, there are two important steps:

- ◆ From CEO – we mark every question in the survey as “required”. That is, to submit the completed questionnaire a responder must answer every question. This is very important when there is an offer to win a gift card when completing the survey.
- ◆ From the Client – there is a need to post the survey link in as many customer contact points as possible quickly to generate responses.

### Posting

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The goal of the CEO survey is to unearth the **why** of your customers. By understanding why your customers prefer your company, you can amplify the reasons and attract and retain more customers. There are three broad areas where a company might post:



## 1. Company-owned touchpoints.

- Website
- Newsletter
- Email database
- Direct Mail
- Stores and other physical locations
- Any other point in which you touch your customers

We encourage you to post as follows:

- Website
  - Permanent banner and/or box on the upper right-hand corner
- Newsletter
  - Box calling attention to the survey and offering to participate to win gift cards
  - Include the box in every newsletter
- Email database
  - Unless you have a very active web page, your email database will be the most effective tool in generating responses.
  - As a bottom of the page of all emails for a period of time, with a box calling attention to the survey and offering to participate in a drawing for gift cards
  - Do one stand-alone email per month for the survey
  - Most CRM systems allow you to eliminate recipients who have opened or responded to emails before, so you can do that to avoid annoying your customers.



- Direct Mail
  - If your company has any printed direct mail piece going out, CEO Analytics will create a QR code for the survey. These pieces can be anything from postcards to catalogs, price lists, invoices and more.
  - We do not recommend creating an ad-hoc printed piece for the survey as it is a costly alternative
- Stores and other physical locations – if your company has brick & mortar stores, these locations are ideal to generate complete responses
  - Tabletop tents – typically works well in restaurants and bars
  - Posters or wall signs in stores
  - Countertop cards
  - Register Receipts

The need for incentives: CEO's experience has been that when our clients incentivize responses, either through a sweepstakes, a special offer or discount, this will increase the number of responses substantially. Moreover, because of the way in which we structure our surveys, respondents have to finish the survey and they can't answer quickly and without considering the response. That way we eliminate rewards hunters.

## **2. Company social media Pages**

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Of all of the corporate media pages, it seems that Facebook gets the most results quickly. There are several forms that company social media presence can take:

- Posts in the regular feed – we suggest always having at least an illustration or product picture, but also consider video, a picture carousel, or a meme-like illustration
- Posts in stories – these do well in advertising the contest for the gift cards, for example
- Posts asking people to repost
- Post everywhere: Facebook, Twitter, Instagram, LinkedIn, YouTube, TikTok and more

For social media posts to work well they must be reposted a few times per day. In spite of what “experts” say, posting 2/day in Facebook or as many as 4/day in Twitter is not a problem, the speed at which the feed is refreshed makes each post last only less than a minute. Also, media platforms have limits on the organic reach of a post, so, for every post you might calculate that you reach 3% or so of your “likes”.

If you or your team use social media scheduling tools such as Hootsuite scheduling is much easier.

Finally, try different illustrations and headlines to see which ones draw a bigger response.

## **3. Personal social media Pages**

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If you have a large following you might want to post the Survey Live Link to your personal social media pages. This is especially true of business owners who might have a larger personal than company following.

All the comments above apply.

If you have any questions please contact Marcelo Salup, [msalup@CEO-Analytics.com](mailto:msalup@CEO-Analytics.com)

## CEO Analytics – Standardized Demographic Factors

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- |  |  |  |
|--|--|--|
| <p>1. Age</p> <ul style="list-style-type: none"> <li>a. &lt;18</li> <li>b. 19-24</li> <li>c. 25-34</li> <li>d. 35-44</li> <li>e. 45-54</li> <li>f. 55-64</li> <li>g. 65+</li> </ul>  | <p>c. Rather not answer</p> <p>8. Job Seniority</p> <ul style="list-style-type: none"> <li>a. Owner</li> <li>b. C-Level</li> <li>c. VP</li> <li>d. Director</li> <li>e. Manager</li> <li>f. Clerical</li> <li>g. Hourly</li> <li>h. Other</li> </ul> | <p>g. Health Care</p> <p>h. First Responder</p> <p>i. Marketing &amp; Advertising</p> <p>j. Real Estate</p> <p>k. Restaurants</p> <p>l. Retail</p> <p>m. Retired</p> <p>n. Student</p> <p>o. Other</p> <p>p. Rather not answer</p> |
| <p>2. Child &lt;18 living at home</p> <ul style="list-style-type: none"> <li>a. Yes</li> <li>b. No</li> </ul>  | <p>9. Race</p> <ul style="list-style-type: none"> <li>a. White</li> <li>b. Black</li> <li>c. Asian</li> <li>d. Other</li> </ul>  | <p>12. State</p> <ul style="list-style-type: none"> <li>a. Drop down menu</li> </ul>   |
| <p>3. Country</p> <ul style="list-style-type: none"> <li>a. Drop down menu</li> </ul>  | <p>10. Employment Status</p> <ul style="list-style-type: none"> <li>a. Full Time</li> <li>b. Part Time</li> <li>c. Unemployed</li> <li>d. Self-employed</li> <li>e. Student</li> <li>f. Retired</li> <li>g. Rather not answer</li> </ul>             | <p>13. Marital Status</p> <ul style="list-style-type: none"> <li>a. Married</li> <li>b. Single</li> <li>c. Divorced</li> <li>d. Other</li> </ul>   |
| <p>4. Company Size</p> <ul style="list-style-type: none"> <li>a. 1</li> <li>b. 2-10</li> <li>c. 11-50</li> <li>d. 51-500</li> <li>e. 501+</li> </ul>                                 | <p>11. Job Sector/Industry</p> <ul style="list-style-type: none"> <li>a. Drop down menu</li> <li>b. Accounting</li> <li>c. Cruise Industry</li> <li>d. Financial Services</li> <li>e. Hospitality</li> <li>f. Legal Services</li> </ul>              | <p>14. Zip code</p> <ul style="list-style-type: none"> <li>a. Open input</li> </ul>  |
| <p>5. Education</p> <ul style="list-style-type: none"> <li>a. Finished High School</li> <li>b. Some College</li> <li>c. Finished College</li> <li>d. Post Graduate Degree</li> </ul> |  | <p>15. We can add client-specific factors</p>  |
| <p>6. Ethnicity</p> <ul style="list-style-type: none"> <li>a. Hispanic</li> <li>b. Other</li> </ul>  |  |  |
| <p>7. Gender</p> <ul style="list-style-type: none"> <li>a. Male</li> <li>b. Female</li> </ul>  |  |  |