July 20, 2022

Small Business CEO Analytics Package

The Small Business CEO Package is a great alternative for small businesses 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 Small Business 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
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

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.

Some of the key uses of CEO Analytics:

- Measure both, score and relevance of product, brand or service attributes
- Test product features inexpensively
- Predict which are the best promotional and/or marketing activities prior to committing

Core Features

- Choice of up to 10 demographic variables
- Choice of 8 product/business attributes
- Active assistance from CEO to select variables and 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

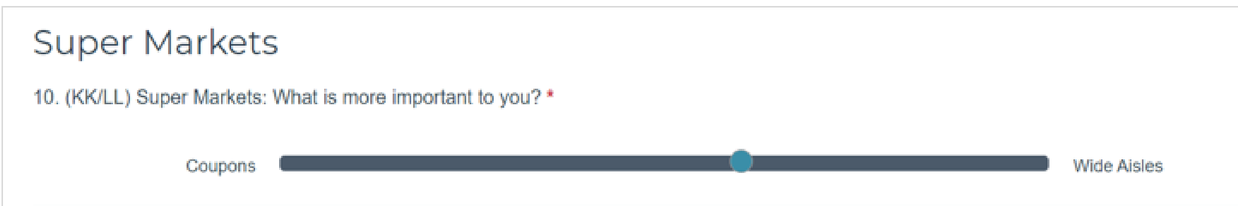
What does your Small Business package include?

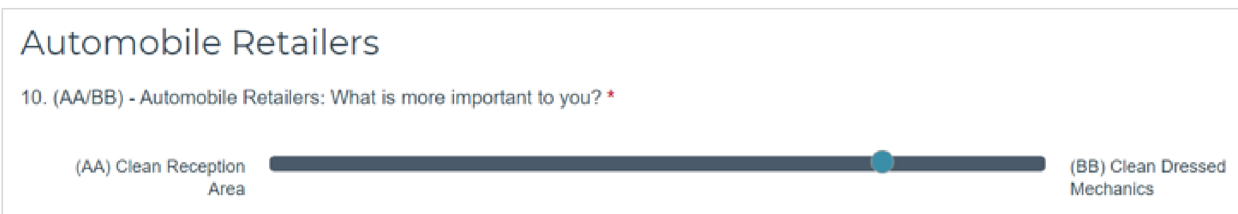
The Small Business Package is designed to give your company powerful actionable insights that will help you increase revenues.

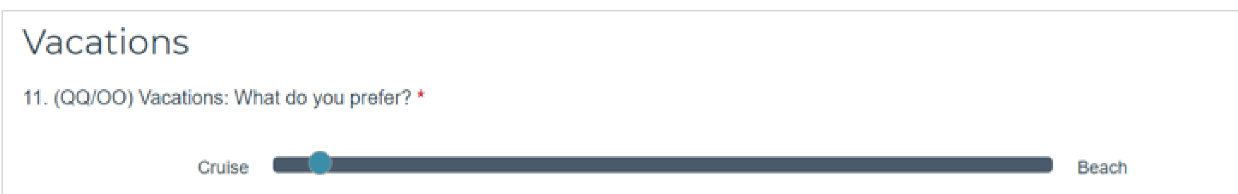
1. Custom-made survey

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.

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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=eyJrIjoiNzQyNWRiNzQtYzk3ZS00M2ZmLWFlYTgtZjRiZDIzN2Y0YzM2IiwidCI6ImEzZDFlNzgxLWYyZTQtNDMwOC1hYWRhLWY5YjA4ODdjZTdkMyIsImMiOjN9&pageName=ReportSection496ccbfdba41b704af71

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 Small Business Package contract: 1,000 responses or 6 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 Small Business 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

#1 – Information

- We will ask you for information about you, your company, your products and your competitors.
- You will choose up to 10 demographic variables that drive your business from a list of 15
- You will write in up to 8 product/business attributes in descending order of importance.
- You will then pay $3,667 or 1/3 of the $11,000 project fee
- We will hold a strategic session with you and your team or your designated person to go over the variables and attributes and make sure that you obtain the results you need

#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 $3,667 or 1/3 of the $11,000 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 1st 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 1,000 completed surveys are in or six months have elapsed, whichever comes first

#5 – Dashboard and Training

- The Small Business package 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

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 10 demographic factors from this list

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

Please write in 8 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. These will be the basis of our phone discovery session

Attribute
#1 -
#2 -
#3 -
#4 -
#5 -
#6 -
#7 -
#8 -

Note: Once we agree on the attributes and we include them in the survey, they 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 Small Business Package described above.

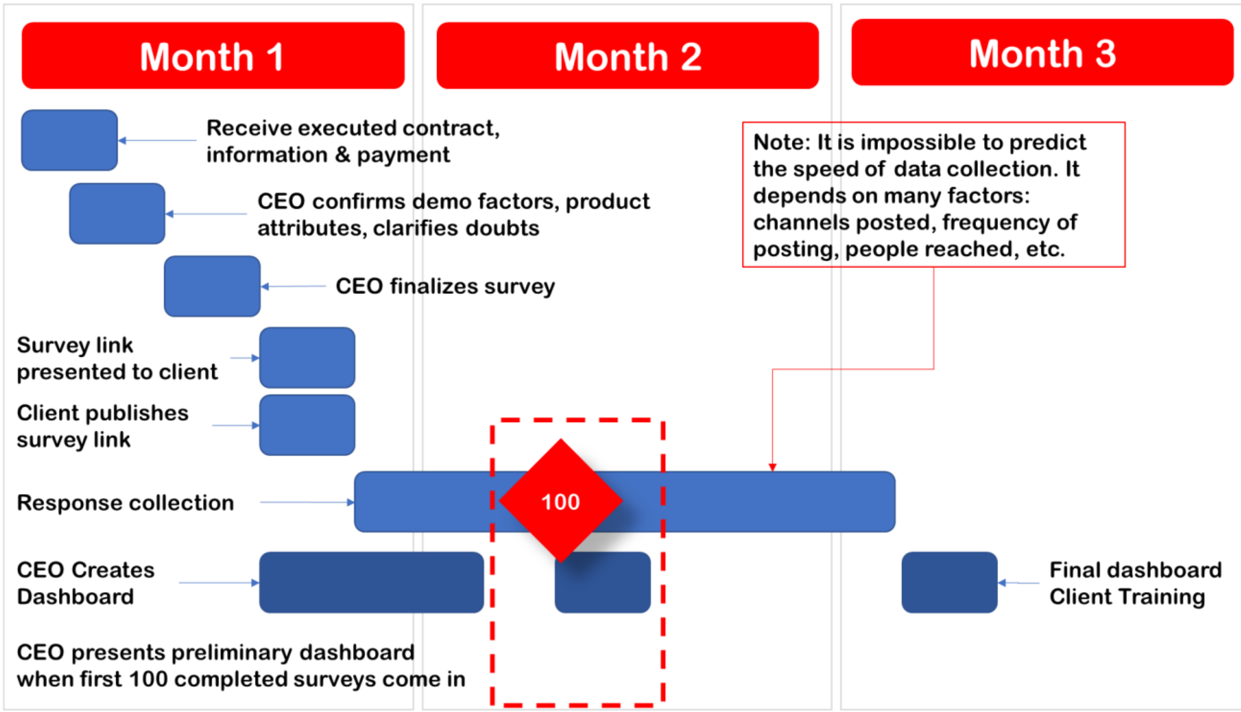
I understand that as part of the Small Business Package, CEO Analytics will create and develop the survey and dashboard based on the input that it receives from (Company) Click or tap here to enter text. and that (Company) Click or tap here to enter text. assumes full responsibility for the correct selection 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 Small Business Package is for 1,000 completed surveys or 6 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 1,000 completed surveys have been reached or at the end of 6 months, whichever happens first, we will present the final data and dashboard.

Step 4 – Payment

Cost: $11,000 payable in 3 installments as follows:

- $3,667 with the signature of the purchase order
- $3,667 with the delivery of the survey link.
- $3,667 with the delivery of the 1,000 completed surveys or at the end of 6 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

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 2nd and 3rd 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

Get the most out of your CEO Survey!

Two keys to success

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:

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.

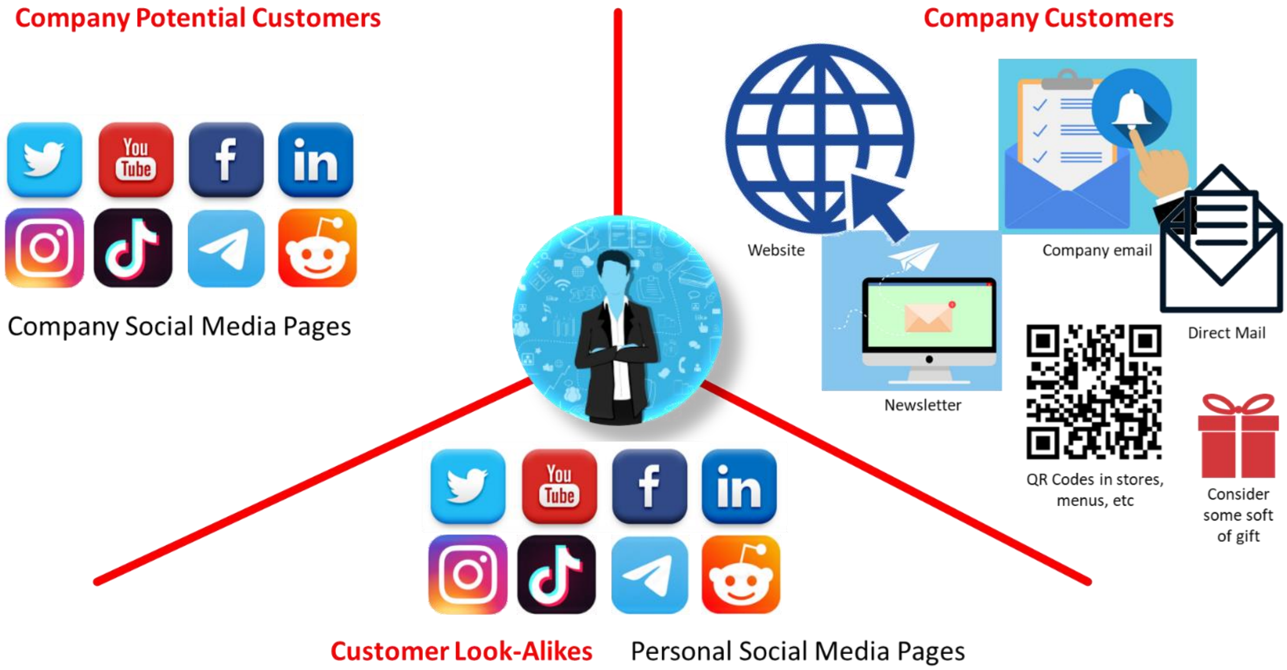
Goal

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

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

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 carrousel, 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

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

CEO Analytics – Standardized Demographic Factors

1. Age
    a. <18
    b. 19-24
    c. 25-34
    d. 35-44
    e. 45-54
    f. 55-64
    g. 65+
2. Child <18 living at home
    a. Yes
    b. No
3. Country
    a. Drop down menu
4. Company Size
    a. 1
    b. 2-10
    c. 11-50
    d. 51-500
    e. 501+
5. Education
    a. Finished High School
    b. Some College
    c. Finished College
    d. Post Graduate Degree
6. Ethnicity
    a. Hispanic
    b. Other
7. Gender
    a. Male
    b. Female
    c. Rather not answer
8. Job Seniority
    a. Owner
    b. C-Level
    c. VP
    d. Director
    e. Manager
    f. Clerical
    g. Hourly
    h. Other
9. Race
    a. White
    b. Black
    c. Asian
    d. Other
10. Employment Status
    a. Full Time
    b. Part Time
    c. Unemployed
    d. Self-employed
    e. Student
    f. Retired
    g. Rather not answer
11. Job Sector/Industry
    a. Drop down menu
    b. Accounting
    c. Cruise Industry
    d. Financial Services
    e. Hospitality
    f. Legal Services
    g. Health Care
    h. First Responder
    i. Marketing & Advertising
    j. Real Estate
    k. Restaurants
    l. Retail
    m. Retired
    n. Student
    o. Other
    p. Rather not answer
12. State
    a. Drop down menu
13. Marital Status
    a. Married
    b. Single
    c. Divorced
    d. Other
14. Zip code
    a. Open input
15. We can add client-specific factors