

PLAY BOOK

PROFITS4PURPOSE



Winning teams are notorious for developing great playbooks. The very best teams even craft their first several plays before the game even starts, knowing it will inform them of what is to come.



WELCOME TO THE PROFITS4PURPOSE **PLAYBOOK**

Our goal is to work alongside you to ensure we not only accomplish our objectives but launch exceptional zest. This playbook contains the proven, winning game plan that has guided the world's most impactful programs. Over the next several pages you will develop your game plan through our "show and tell" model. From launch to ongoing growth, we work with you to ensure the winning formula.

Welcome to the Profits4Purpose, Playbook.

Let's go!

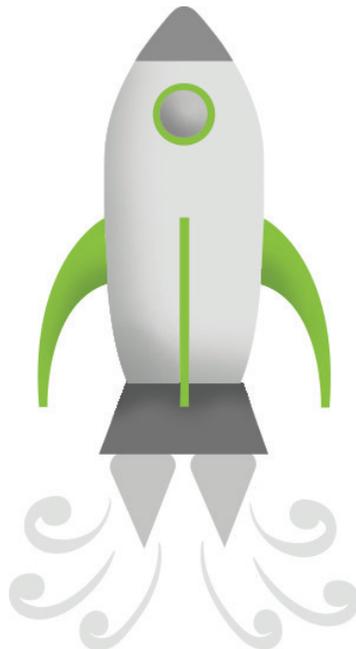
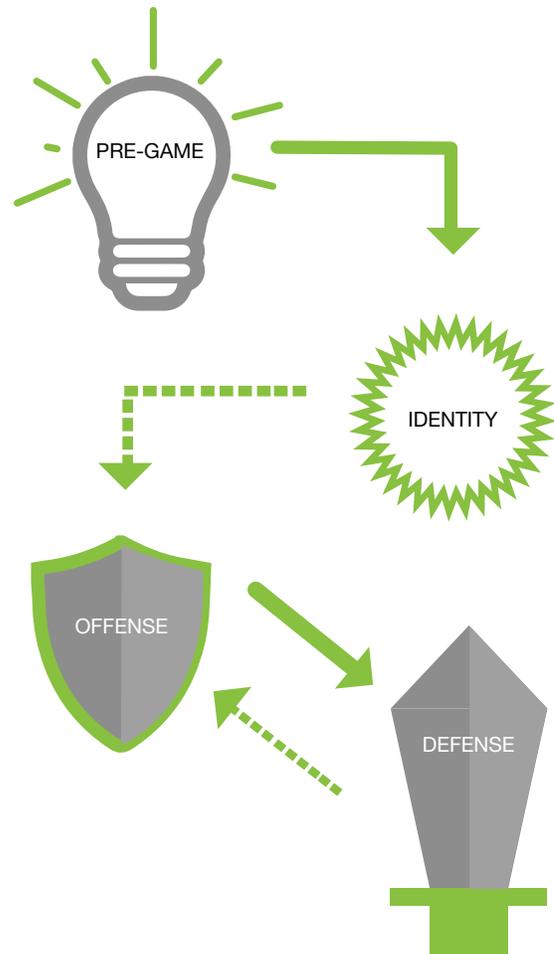




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Once impact begins, we will establish a continual rhythm of offense and defense to grow and deepen your program for years to come. The Pre-Game and Identity stages will be revisited appropriately on an as needed basis.





PHASE ONE

GETTING STARTED (PRE-GAME)

We know that winning begins well before the game ever starts. Just like the Yankee's provided the stage for Babe Ruth to become the "Great Bambino", you will provide the environment for your team to thrive in meaningful impact.

Ensuring gameday success involves building the stadium, filling the roster and making sure all seats are full when that first whistle blows. Through our pre-game playbook, we provide the roadmap to ensure necessary players are engaged and program needs are met for launch.

The pre-game playbook follows a three-step process:

- ① DEFINE 
- ② DEVELOP 
- ③ DEPLOY 

PHASE ONE

GETTING STARTED (PRE-GAME)

1 DEFINE

The define stage involves reviewing your detailed project plan and milestones. Here we also introduce project management tools and communication rhythm that will ensure a successful launch.

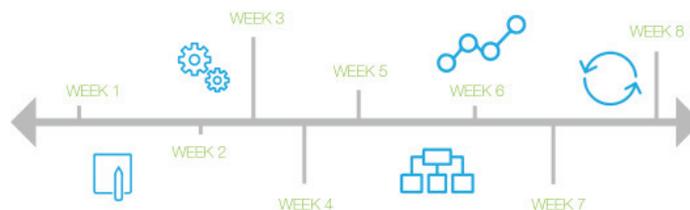


- ▶ Project Plan Example
- ▶ Project Management Tools
- ▶ Rythm



Work with your designated relationship manager to:

- ▶ Build out your customized project plan
- ▶ Get familiar with our project management tools
- ▶ Establish an agreed upon communication rhythm



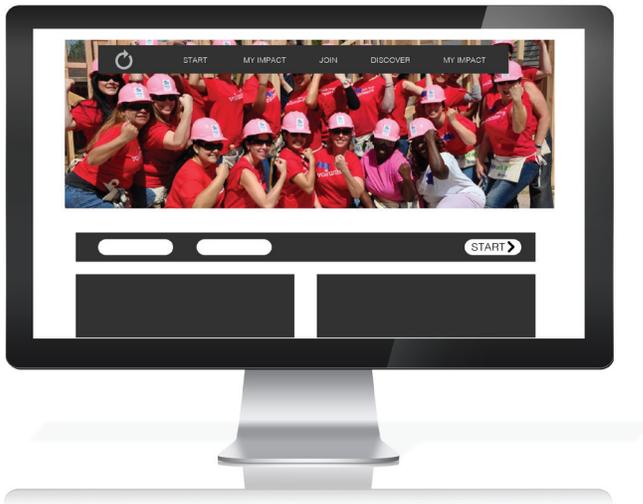


② DEVELOP

The develop section is where you begin to see your platform take shape, as we use our internal development methodology to configure and develop your experience. Here, you review your site's technical design and begin seeding your program.



SITE DESIGN (WIRE FRAME)

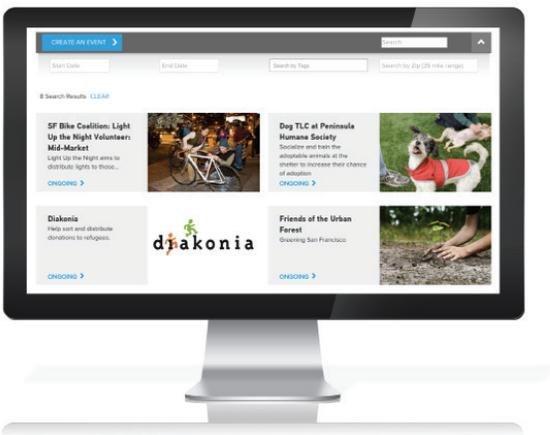




AGILE DEVELOPMENT (GROUP WORK PROCESS GRAPHIC)



SEEDING OF EVENTS AND STORIES



Work with your relationship manager to:

- ▶ Confirm site specs
- ▶ Understand our shared innovation and development cadence
- ▶ Gather the events and stories that will inspire team members to get involved



③ DEPLOY

In deploy, you will beta test the experience, gain user feedback and ensure communication is ready for a successful launch. The purpose of this section is to collectively refine the site and prepare for launch.



- ▶ Admin Tutorials
- ▶ User Tutorials
- ▶ Share Feedback



- ▶ Complete your admin tutorial
- ▶ Gather 10 individuals to complete user tutorial
- ▶ Work with your team to facilitate and gather user feedback

DEPLOY

Admin Tutorials

- Create Events
- Create Campaign
- Submit Donation

User Tutorials

- Share Story
- Donate
- Track Hours

Share Feedback



PHASE TWO

ESTABLISH IDENTITY (HOME FIELD ADVANTAGE)

There is nothing like having the *Home Field Advantage*. The full support of your fans combined with the familiar landscape of your stadium offer a powerful competitive advantage.

Often times programs launch without their greatest advantage. Each company has an internal *Home Field Advantage* that is often overlooked due to the tight focus placed on the program and its needed technology. Discovering and establishing the internal advantage is key to a winning program.

Our framework covers the 5 essentials of identity:

- ① DEFINE PROGRAM NAME 
- ② DEFINE THE VISION 
- ③ DEFINE THE PROGRAM MISSION 
- ④ DEFINE YOUR DIRECTION AND DESIRED OUTCOME 
- ⑤ DEFINE THE SHARED RESPONSIBILITY 

PHASE TWO CONTINUED

1 DEFINE PROGRAM NAME

When forming your identity, there are so many places you could start. Let's start at the top by simply choosing your name.



HYATT
Hyatt Thrive



COX COMMUNICATIONS
Cox Cares

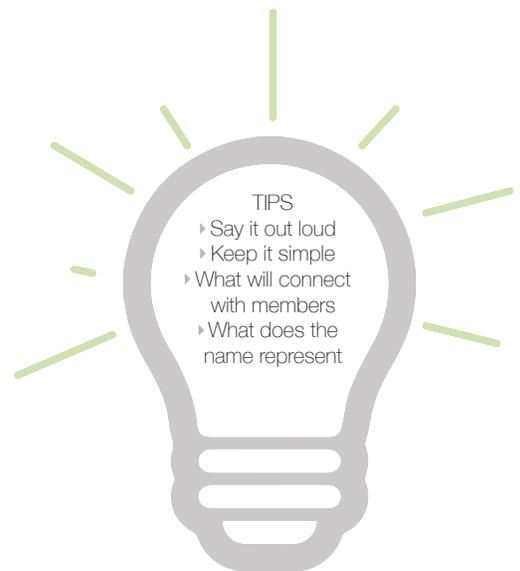


IRON MOUNTAIN
Moving Mountains



Write down three options for your program name.
The name should reflect the brand.

- ▶ 1. _____
- ▶ 2. _____
- ▶ 3. _____





PHASE TWO

CONTINUED

② DEFINE THE VISION - WHAT

The vision explains the overall story you want to tell and why your team should get involved.



Example:

"Our passion is to make this world a more beautiful place. Our impact program exists to help team members pursue their passions for continual learning and growth, while positively impacting needs in our city."



- ▶ Briefly share your vision and why your team should get involved.

- ▶ Share what about the vision connects with people.

- ▶ Share if there is anything about the vision that people may not be clear on.



③ DEFINE THE PROGRAM MISSION- HOW

In order to have confidence in your home field advantage, you must have confidence in the clarity of your intended mission.



At a minimum, this should define your distinctive competency, identify what you do and describe how you will do it.

We exist to:

Distinctive Competency: *Through empowering our employees for impact*
What: *We will transform the cities where we live and work and play*
How: *By connecting employees to events and sharing our story*



Your mission statement defines what the project is, why it exists, its reason for being. Use the format below to craft your own.

We exist to:

▶ Distinctive Competency

▶ What

▶ How



④ DEFINE YOUR DIRECTION AND DESIRED OUTCOME

In order to catch your vision, your team will need to understand the direction and desired outcome.



There is an old saying: “it only matters if it’s measured”. This direction and desired outcome must be quantifiable. You can break the direction and desired outcome into two parts: Engagement and Investment.

Ⓐ ENGAGEMENT

Engagement is a result of how well you execute your offensive strategy (phase three) and indicates if your team is catching your vision (phase one). Importantly, engagement spikes when you promote a campaign and tapers off to a sustained percentage when you are not actively promoting.

At a minimum, you will define your quarterly campaign login percentage and your monthly sustained login percentage.

Example:

- ▶ Quarterly campaign login percentage: 40%
- ▶ Monthly sustained login percentage: 10%



* According to Giving in Numbers, a Committee Encouraging Corporate Philanthropy (CECP) study, industry averages are 43% (campaign) and 8% (sustain)

PHASE TWO CONTINUED

(B) INVESTMENT

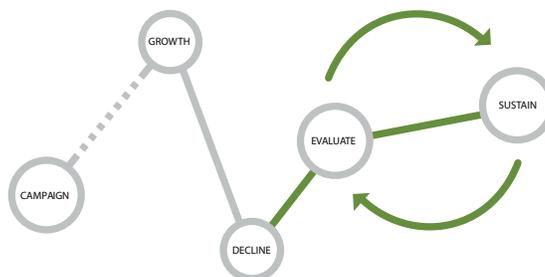
Investment is defined by actual impact in the community. This includes hours tracked and dollars given on an annual basis. If your program is new, you may not know exactly where to start with this number. That is okay, the important thing is to get started and we will evaluate and adjust in our defensive phase.

Example:

- ▶ Year one hours volunteered: 100,000
- ▶ Year one dollars donated: 1,000,000

TELL

Briefly describe where your community and brand will be and what you will accomplish in the next 12 months.



▶ Engagement:

Quarterly campaign login percentage _____
Monthly sustained login percentage _____

▶ Investment:

Year one hours volunteered _____
Year one dollars donated _____



⑤ DEFINE THE SHARED RESPONSIBILITY

For your program to thrive, team members must contribute to the overall direction and desired outcome.



Here, we articulate specific actions (and how many times) our ideal employee participates in. These desired actions indicate they have captured the vision.

- ▶ View content- 2
- ▶ Create event
- ▶ Logins - 10
- ▶ Log hours - 4
- ▶ Donate Dollars - 2
- ▶ Share stories - 2
- ▶ Comment - 8
- ▶ Like - 15
- ▶ Sign up for an event - 2



Define what your ideal user's involvement profile looks like in the first year.

- ▶ View content- __
- ▶ Create Event- __
- ▶ Logins - __
- ▶ Log hours - __
- ▶ Donate Dollars - __
- ▶ Share stories - __
- ▶ Comment - __
- ▶ Like - __
- ▶ Sign up for an event - __



PHASE THREE

GETTING STARTED (WEST COAST OFFENSE)

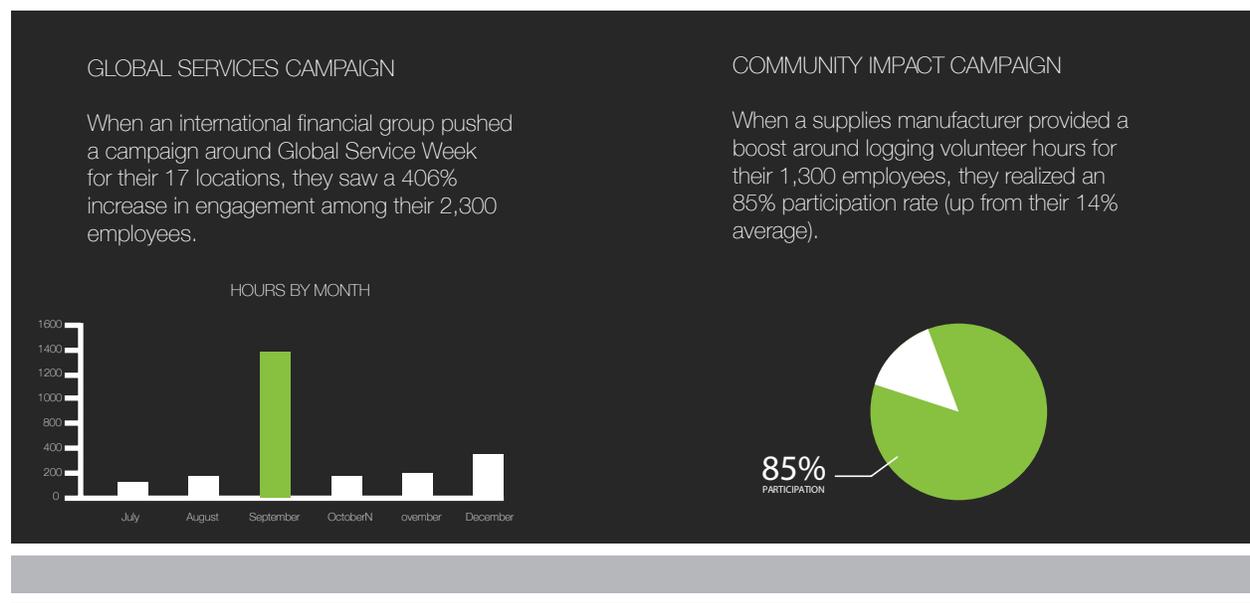
When it comes to building successful programs, being on the offensive is key. Employees are inundated with calls to action both in and outside of the company. So how do you get on the offense?

Legendary Coach Bill Walsh crafted the formula for what has become known as, the West Coast offense. Its emphasis was on less running and more passing. To pass the ball, we use a simple, winning formula called campaigns. Campaigns are specific calls to action designed to drive your program goals.

*National average participation in workplace giving programs jumps from 7.5% to 43% for companies that focus efforts around campaigns.

Our clients have seen even higher results. Through engaging and mobilizing employees all together at one time, impact can increase by 400%.

*Giving in numbers, CECP study



The logo features a green circular arrow pointing clockwise, with the text "PHASE THREE" in a large, bold, sans-serif font and "CONTINUED" in a smaller, all-caps font below it.

PHASE THREE

CONTINUED

CAMPAIGN STRUCTURE

Each campaign has the following elements accounted for.





PHASE THREE

CONTINUED



In our platform, you can create a campaign around anything. See below for an example of a campaign around sharing impact stories.

<p>Campaign Title</p> <ul style="list-style-type: none"> ▶ Stories to Inspire <p>Desired Actions</p> <ul style="list-style-type: none"> ▶ Like a story: 10 points ▶ Comment on a story: 20 points ▶ Post a story: 100 points <p>Goal</p> <ul style="list-style-type: none"> ▶ 150,000 points <ul style="list-style-type: none"> ▶ Point Goal per employee: 100 ▶ Number of employees you desire to engage: 1,500 <p>Length of Campaign</p> <ul style="list-style-type: none"> ▶ 4 weeks <p>Call to action</p> <ul style="list-style-type: none"> ▶ Our story begins with your story. Share a story that matters to you. This could be anything from past experiences, causes you're passionate about, to plans for the future! We are excited to hear from you! <p>Rewards</p> <ul style="list-style-type: none"> ▶ 100 points, you are entered into a raffle! 	<p>Communication Strategy (Timeline images)</p> <p>Pre-launch</p> <ul style="list-style-type: none"> ▶ Website changes: <ul style="list-style-type: none"> ▶ Announce campaign on home page ▶ Update points breakdown ▶ Internal: <ul style="list-style-type: none"> ▶ Create communication for intranet ▶ Create flyers announcing campaign ▶ Enlist support of managers <p>Week 1</p> <ul style="list-style-type: none"> ▶ Email sent out announcing the upcoming campaign ▶ Featured stories posted ▶ Intranet promotion <p>Week 2</p> <ul style="list-style-type: none"> ▶ Pass out impact cards <p>Week 3</p> <ul style="list-style-type: none"> ▶ Intranet promotion "1 week until campaign begins" ▶ Send out reminder email <p>Week 4</p> <ul style="list-style-type: none"> ▶ Campaign begins ▶ Email - "Campaign has begun" <p>Week 5</p> <ul style="list-style-type: none"> ▶ Feature most liked story on home page ▶ Email - featured stories <p>Week 6</p> <ul style="list-style-type: none"> ▶ Feature most liked story on home page ▶ Email - one week left! <p>Week 7</p> <ul style="list-style-type: none"> ▶ Email "Last week!" <p>Week 8</p> <ul style="list-style-type: none"> ▶ Intranet message "thank you family" ▶ Celebration message on home page ▶ Raffle
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PHASE THREE

CONTINUED

TELL

▶ Campaign Title

▶ Desired Actions

▶ Goal

▶ Length of Campaign

▶ Call to Action

▶ Rewards



► Communication Strategy

Week 1

▶ _____
▶ _____

Week 2

▶ _____
▶ _____

Week 3

▶ _____
▶ _____

Week 4

▶ _____
▶ _____

Week 5

▶ _____
▶ _____

Week 6

▶ _____
▶ _____

Week 7

▶ _____
▶ _____

Week 8

▶ _____
▶ _____



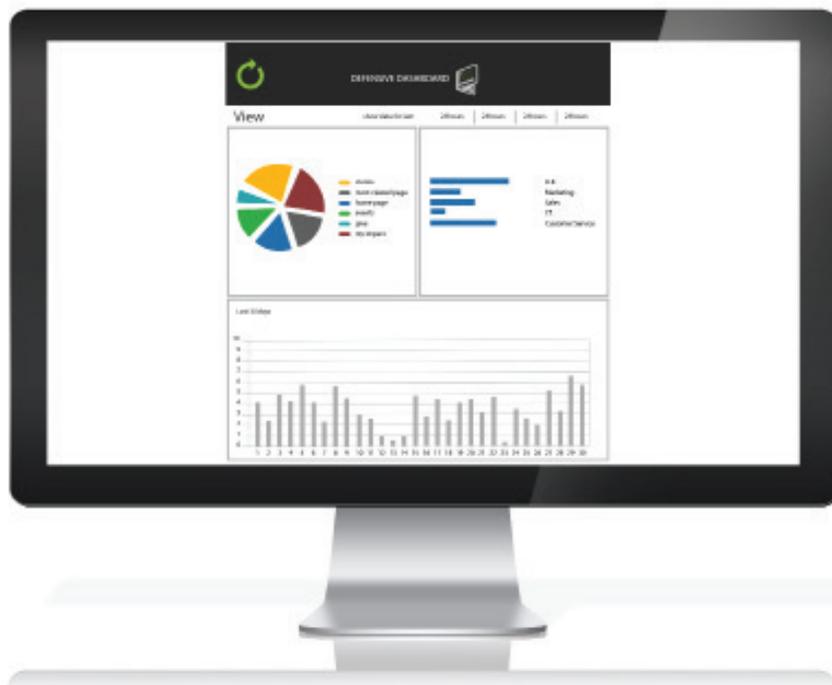
PHASE FOUR

KNOWING YOUR BLIND SPOTS (DEFENSE WINS CHAMPIONSHIPS)

An area that is often overlooked when it comes to building great programs is possible point of weakness.

Paul Bear Bryant, the most decorated coach in college football, says the key to success is defense. At the end of the day we can score all we want, but if we don't protect what we've gained we will often experience failed programs.

In our context, defense means fully understanding how your program is performing. Our strategic report follows the "Five W's", a proven formula for getting the complete story on a subject. After each campaign, your relationship manager will review your strategic report with you to measure the success of your offensive campaigns. This approach reveals your program performance, closes the gaps on missed opportunities and contains the following:



PHASE FOUR

CONTINUED

SHOW

RED LIGHT GREEN LIGHT REPORT

- ▶ The Red Light Green Light report will briefly explain each of the previous four weeks performance as well as key performance indicators.

FIVE W's

- ▶ Who engaged with your program?
 - ▶ New users
 - ▶ Returning users
 - ▶ Total number of users
- ▶ What did they do on the platform?
 - ▶ How many likes?
 - ▶ How many comments?
 - ▶ How many stories posted?
 - ▶ How many hours tracked?
 - ▶ How many dollars donated?
- ▶ Where did their engagement take place?
 - ▶ Where did users go?
 - ▶ Where did they bail?
 - ▶ Where did they not go?
- ▶ When did their engagement happen?
 - ▶ What days?
 - ▶ Average time on the site
- ▶ WHY: THREE-BY-THREE
 - ▶ Three areas of greatest success
 - ▶ Three areas needing most consideration



THREE STORIES TO LEVERAGE

- ▶ Complete the circle. Why we do what we do.

THE BIG IDEA

- ▶ P4P will share the single biggest lesson we have learned from managing our portfolio of clients.



PHASE FOUR

CONTINUED

TELL

After you view your defensive dashboard, you can begin to ask the Why. Asking the why will inform your campaign and engagement strategy going forward.

Answer the following questions:

Why are people coming to the site?

- ▶ _____
- ▶ _____

Why are people leaving the site?

- ▶ _____
- ▶ _____

Why is our strategy succeeding?

- ▶ _____
- ▶ _____

Why is our strategy not succeeding?

- ▶ _____
- ▶ _____

Why does this matter?

- ▶ _____
- ▶ _____



PHASE FOUR

CONTINUED

“By definition, a Playbook is “a set tactics frequently employed by one engaged in a given activity”. Over the years, we’ve seen these principles employed to empower vision, inspire people and ultimately take giving and volunteering to new levels. We are excited for your strategies this season to continue deepening purpose and uniting your team.

Collectively, let’s achieve a powerful impact story.

Game on!”





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