

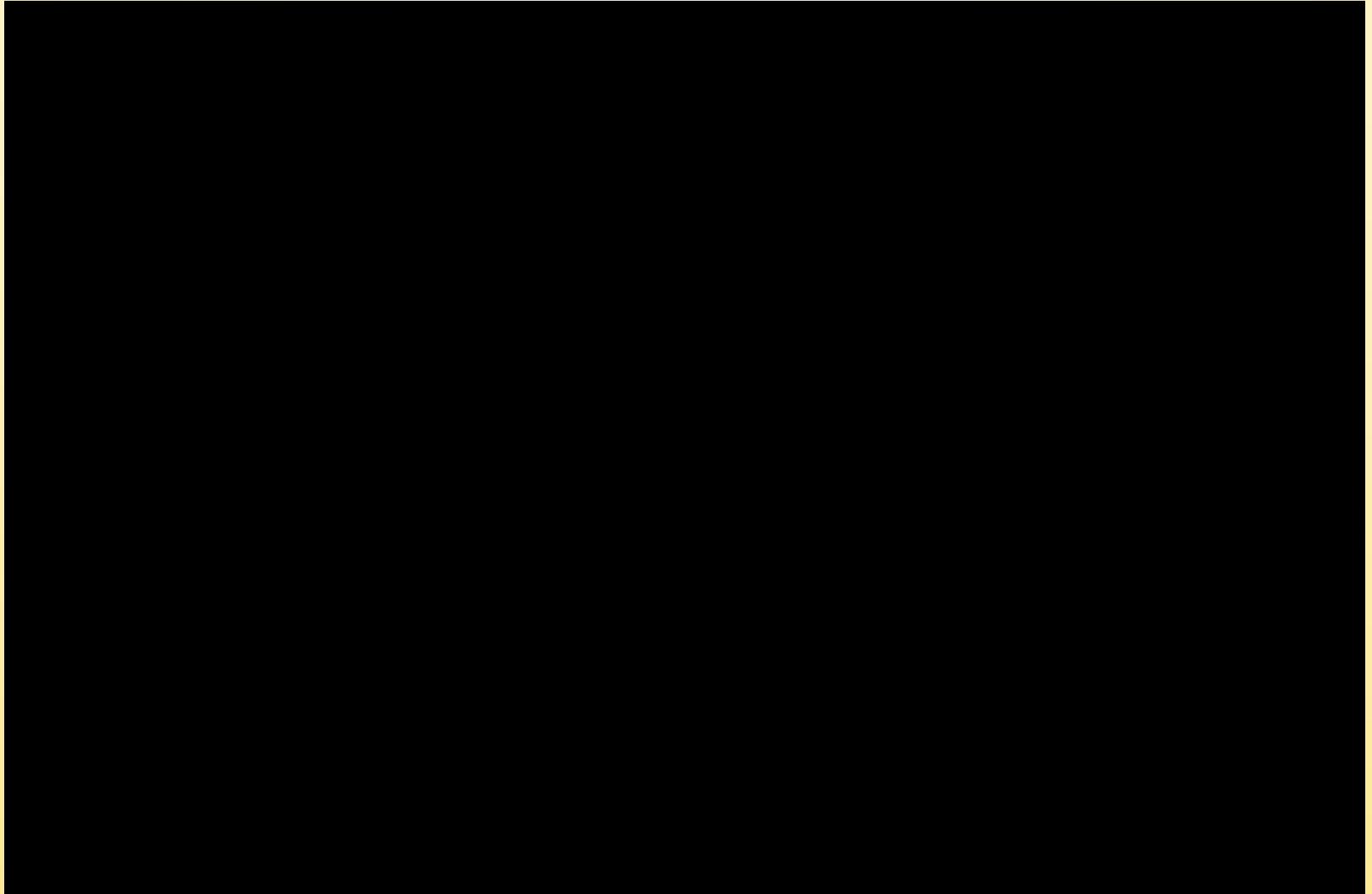


Dan Fenton Presented  
At 1/28/2013 tourism study  
Workshop at Ocean Center

# *An analysis of Volusia County tourism marketing*

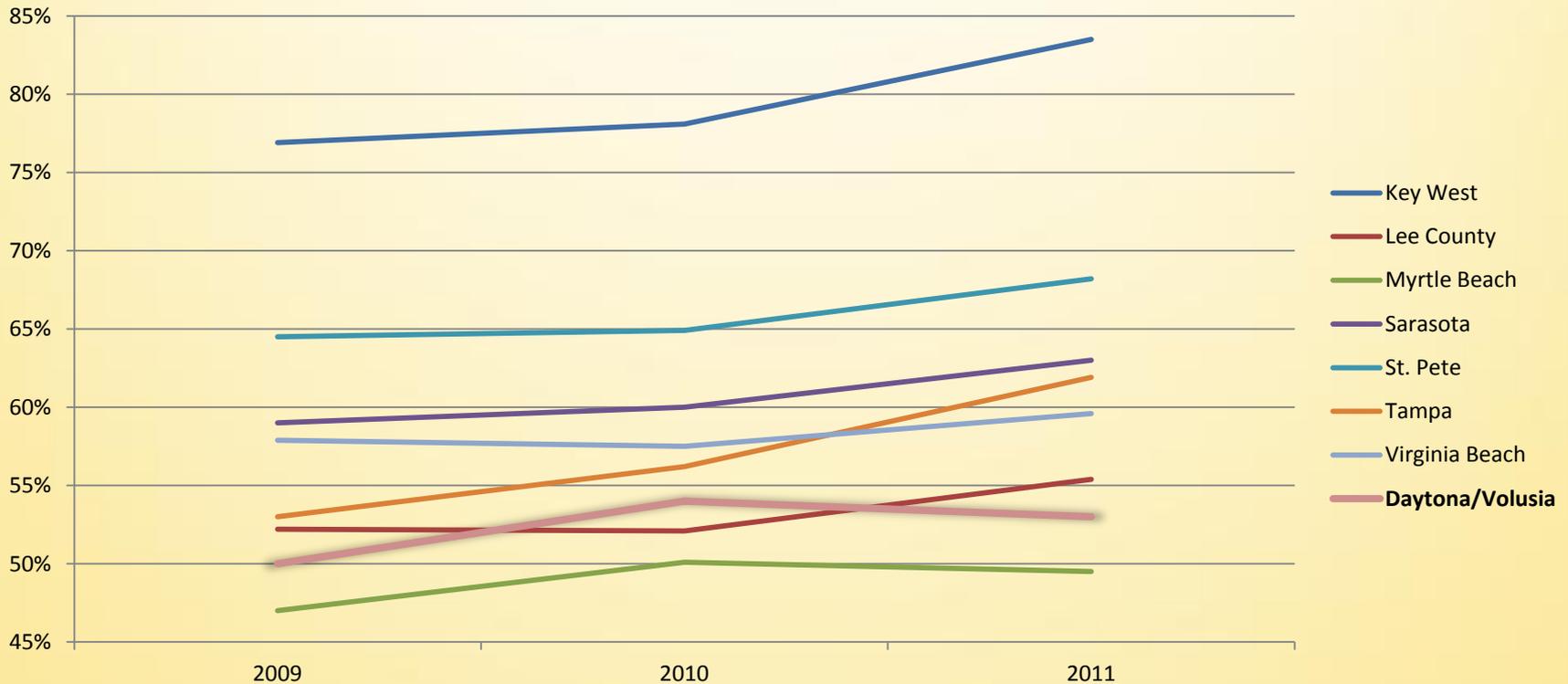
*Presented to  
the Volusia County Council  
by Strategic Advisory Group,  
Duluth, Georgia  
Daniel Fenton, Lead Consultant  
January 2013*

# Thanks



# Current State of the Industry

## Occupancy trends



- Occupancy not trending upward

# Nearly 150 participants

- County Council
- City leadership
- County administration
- Tourism board members
- Industry stakeholders
- Tourism organizations
- Key partners
  - Chambers of commerce
  - Hotel motel associations
- Community Leaders
- Economic Development leaders

# Common themes

- Tourism is critical in creating jobs and economic vitality
- Passion
  - Interest in involvement
- Centralized marketing – concerns
  - Resources potentially will be redistributed
- Stakeholder communication important
  - Felt uninformed
- Condition of the tourism product
  - Deteriorating
  - Lack of investment
- Clarity of target customer
  - Lack of understanding
  - Concern over current targets

# Coordination and Leverage

- Lack of coordination – leverage
    - City Leadership
    - Chambers of Commerce
    - Arts Community
  - Opportunities to maximize collective resources
- ## Examples
- Independent event calendars
  - Independent hotel reservation systems
  - Independent tourism promotion campaigns
  - Support for tourism product development initiatives



# SWOT

## Strengths

Brand awareness – Daytona  
 The beaches  
 Community Interest  
 Tourism’s positioning – lead industry  
 Multiple Volusia experiences

- Eco tourism
- Fishing
- Boating
- Cycling
- Birding

Interested, engaged county leadership  
 New leadership: Daytona Beach, SVAA  
 Interested partners: Speedway, Econ Dev.  
 History  
 Daytona 500

- Most watched auto race in the United States - top 10 U.S. sporting event every year
- Forbes’ fourth most valuable brand

Successful events  
 Value

## Weaknesses

Marketing efforts need focus  
 Lack of research  
 Marketing decisions opinion, not research based  
 Lack of functional support for smaller authorities  
 Lack of leverage – collaboration w/ partners

- Chambers
- Cities
- Speedway

Economic development efforts not focused on tourism  
 Underperforming, poorly functioning group sales effort  
 Underperforming sports sales effort  
 Declining tourism product

## Threats

Divided polarized industry – community  
 Disengaged industry stakeholders  
 Group sales effort – non-collaborative  
 Governance model  
 Tourism’s positioning in economic development – attracting development  
 Product deterioration  
 No capital plan in cities or county  
 Number one industry – not treated as such

## Opportunities

Focused marketing efforts with measurable results

- Sell a larger experience than only the beach
- Different broader county experiences
- Create targeted marketing
- Enhance visitor experience – smaller enhancements

Larger capital investment plan

- Fold tourism into larger economic development efforts
- CEO Alliance, Team Volusia, County Econ Dev.

Maximizing sporting opportunities

- New countywide focus on attracting sporting events

Small wonders, streetscape, beach vendors  
 Seamless new approach to group sales  
 Centralize – leverage the brand  
 New partner involvement – collaboration

- Cities
- Chambers

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Value Destination

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## Maximizing sporting opportunities

- New countywide focus on attracting sporting events

## Small wonders, streetscape, beach vendors

- Improve short term opportunities

## Seamless new approach to group sales

## Centralize – leverage the brand

## New partner involvement – collaboration

- Cities
- Chambers
- Arts community

# Threats

Divided polarized industry – community

Disengaged industry stakeholders

Group sales effort – non-collaborative

Governance model

Tourism's positioning in economic  
development – attracting development

Product deterioration

No viable capital plan in cities or county

Number one industry – not treated as  
such

# Principle role of governance

- *The principal role of the authority board members, as representatives of tourism stakeholders and the Volusia County Council, is to oversee the function of the authority and ensure that it operates in the best interests of all stakeholders.*

# Governance – It starts at the top

- Tourism boards are fiduciary and provide direct supervisions of the Executive Directors
- The boards approve the overall marketing plan for the authorities prior to County Council
- The effectiveness of the three authorities is strongly influenced by the effectiveness of the boards
- Members need to bring skill sets and experience that will support the success of the tourism authorities

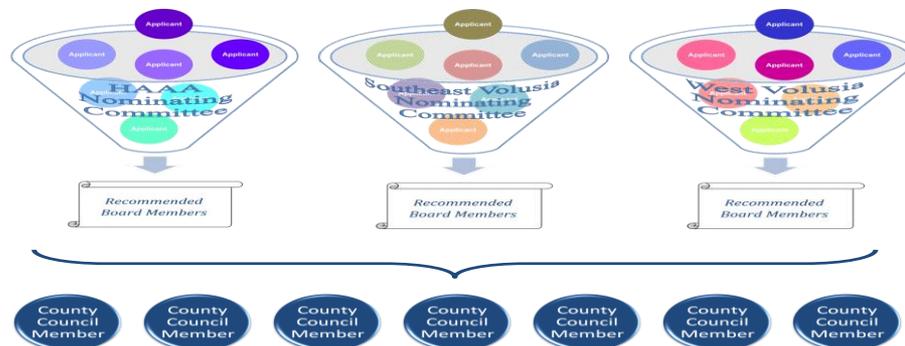
# Industry driven nomination

**CURRENT PROCESS:** Community members that are interested in serving will apply and be nominated by a particular County Council member



Districts 1 – 5, an “at-large” member and the County Chair

**PROPOSED PROCESS:** Nominating committees vet applicants to present to the County Council



District 1 – 5, an “at-large” Member, and the County Chair

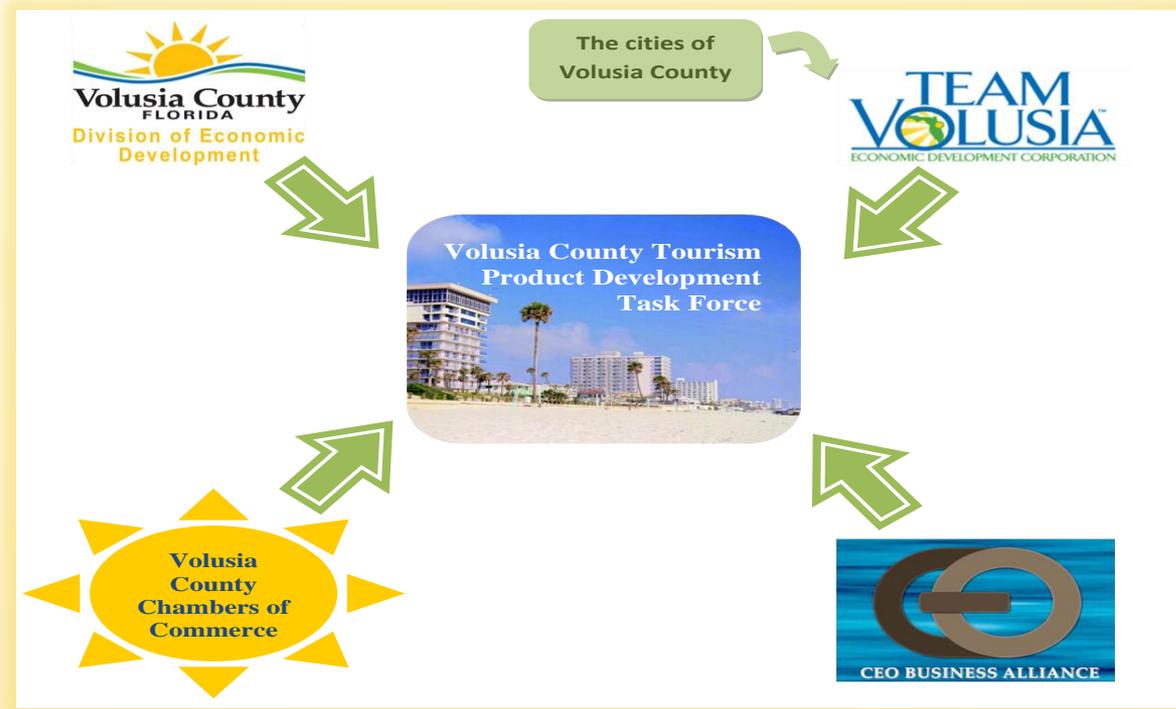
# Governance – Advantages to Industry Supported Process

- Responsibility of the industry to recruit possible candidates
- Opportunity to look at specific skill sets
  - Marketing
  - Finance
  - Communications
- Ensure understanding of accountability
- Council retains final authority – welcomes input

# Product Development

- Vital aspect of future growth
- New broad-based approach is needed
  - Stimulate private investment
- SAG met with CEO alliance, Team Volusia, and County Economic Development
- SAG met with Chambers of Commerce
- Current Economic Development focus – other industries
- Create a structure that focuses economic development resources and talent on tourism

# Tourism Development Task Force



- Volusia County Tourism – Product Development Task Force
- Need community/business leadership
- Tourism needs to be a primary economic development focus
- Not currently cited as key industry

# Task Force – annual planning

- Meets quarterly
- Develops target industries for private investment
  - Entertainment
  - Attractions
  - Hotels
  - Retail
- Tourism authorities provide market research for support
- Reports on progress to tourism industry and key stakeholder

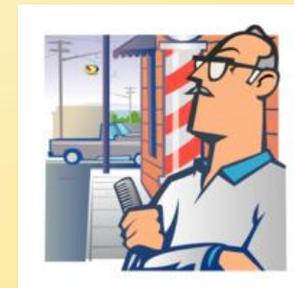
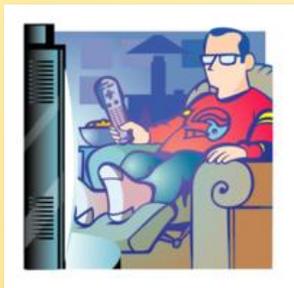
# Research Driven

- Broad-based interest in understanding the “target customer”
  - Opinions vary on the subject
  - SAG reviewed past and current media plans
- Consensus on the need to take a closer look
- PRIZM study approved
- Thanks to everyone involved
- Strong sampling of current visitors

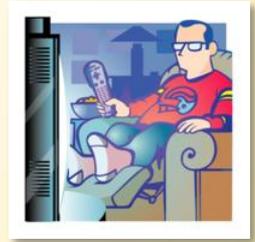
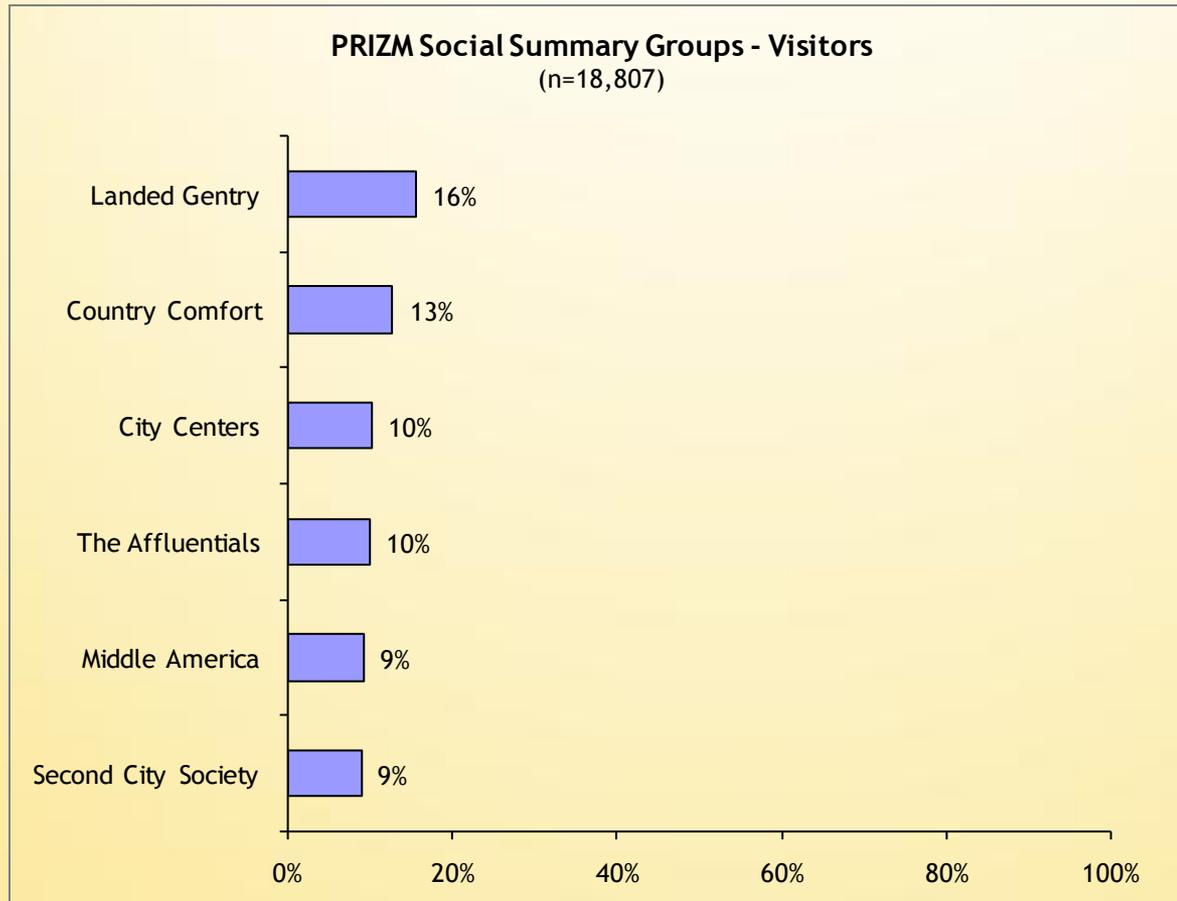
# PRIZM



- Nationally Syndicated
  - GEO codes
  - Studies behavior
  - Benefit of extensive annual research
- Created Sample from 70,000 records



# PRIZM overall segments



# Top Segments

- Landed Gentry – Southeast Volusia
- Country Comfort – Halifax/Daytona
- West Volusia data not yet available
  - Offer to run analysis in future
- Top segments were unique
  - Supports specific focus for future marketing
- Brief overview – importance of targeting
  - More data in full report
  - Authorities to study report further
    - More conclusions and strategies



# Characteristics

## Landed Gentry



- Boomer generation
- College Degrees
- Have and use technology
- Boating
- Health and Exercise
- Median Household Income – \$82,000

## Country Comfort



- Upper middle class home owners
- 25 to 54
- Comfortable lifestyles
- Woodworking – crafts
- Bar hopping
- Playing golf
- Median Household Income – \$56,000

# Landed Gentry – Information



Landed Gentry media and information vehicles

- Satellite Radio Subscribers
- Boating Magazines
- Audubon Magazine
- Runners World
- ABC This Week
- AARP
- Airline Magazines
- Kiplinger's Personal Finance
- Parenting Magazines

# Country Comfort – Information



Country Comfort media and information vehicles

- American Hunter
- Field and Stream/Bassmaster
- Fraternal Magazines
- Four Wheeler Magazine
- Parenting Magazines
- Boating magazines
- Alternative Rock Radio
- Adults Standards Radio
- Classical Radio

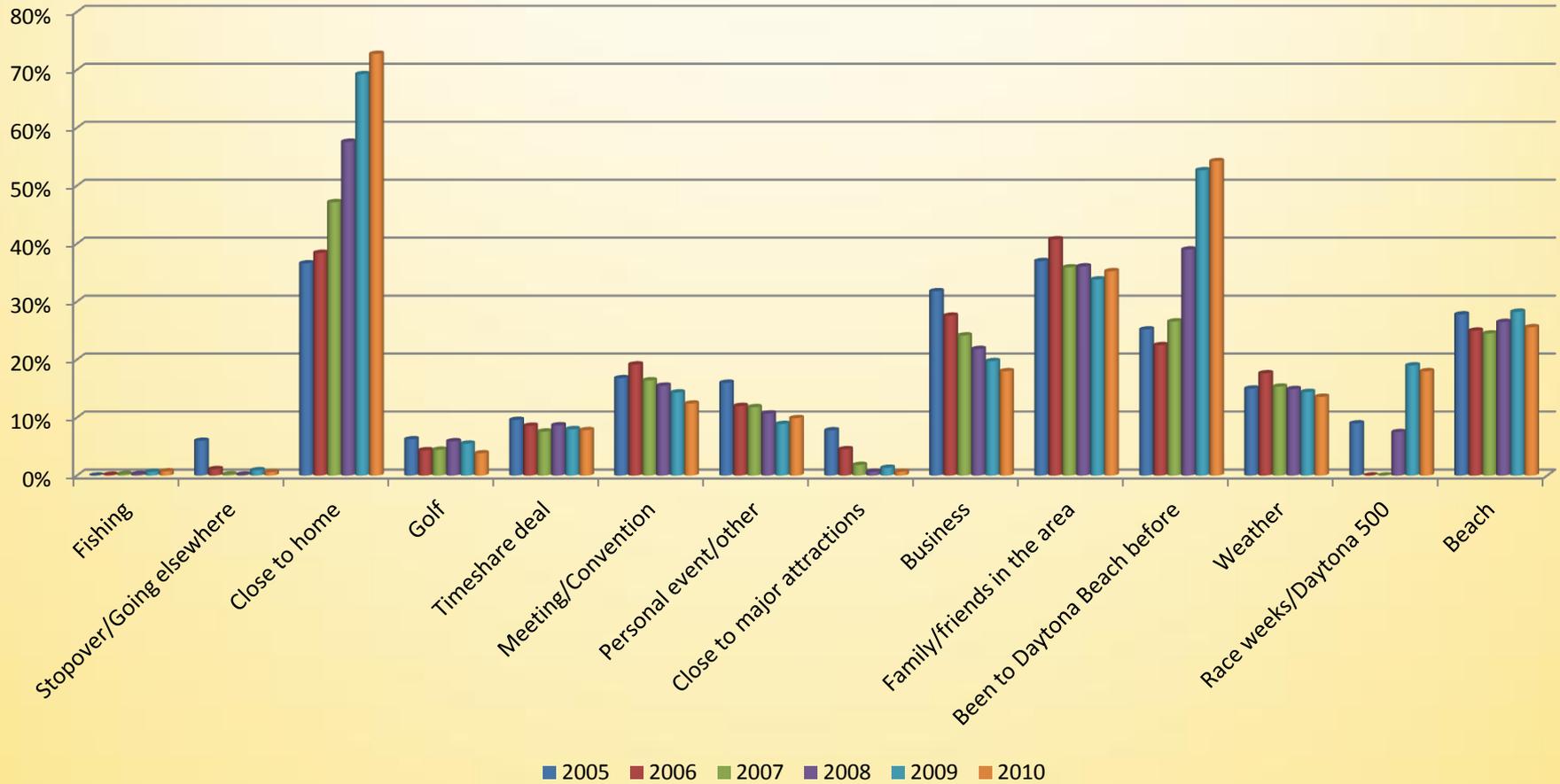
# Opportunity to refine targets

- The understanding and agreement on growth opportunities – in the near future
  - Need to market for today
- Target marketing design to raise awareness
  - With call to action
- Will indicate the level of interest for each experience offered

# Visitor profile study

- SAG reviewed five years visitor profiles – Halifax Daytona
- Current research that is available
- Following is analysis over a five year period

# Reasons visitors chose Daytona Beach



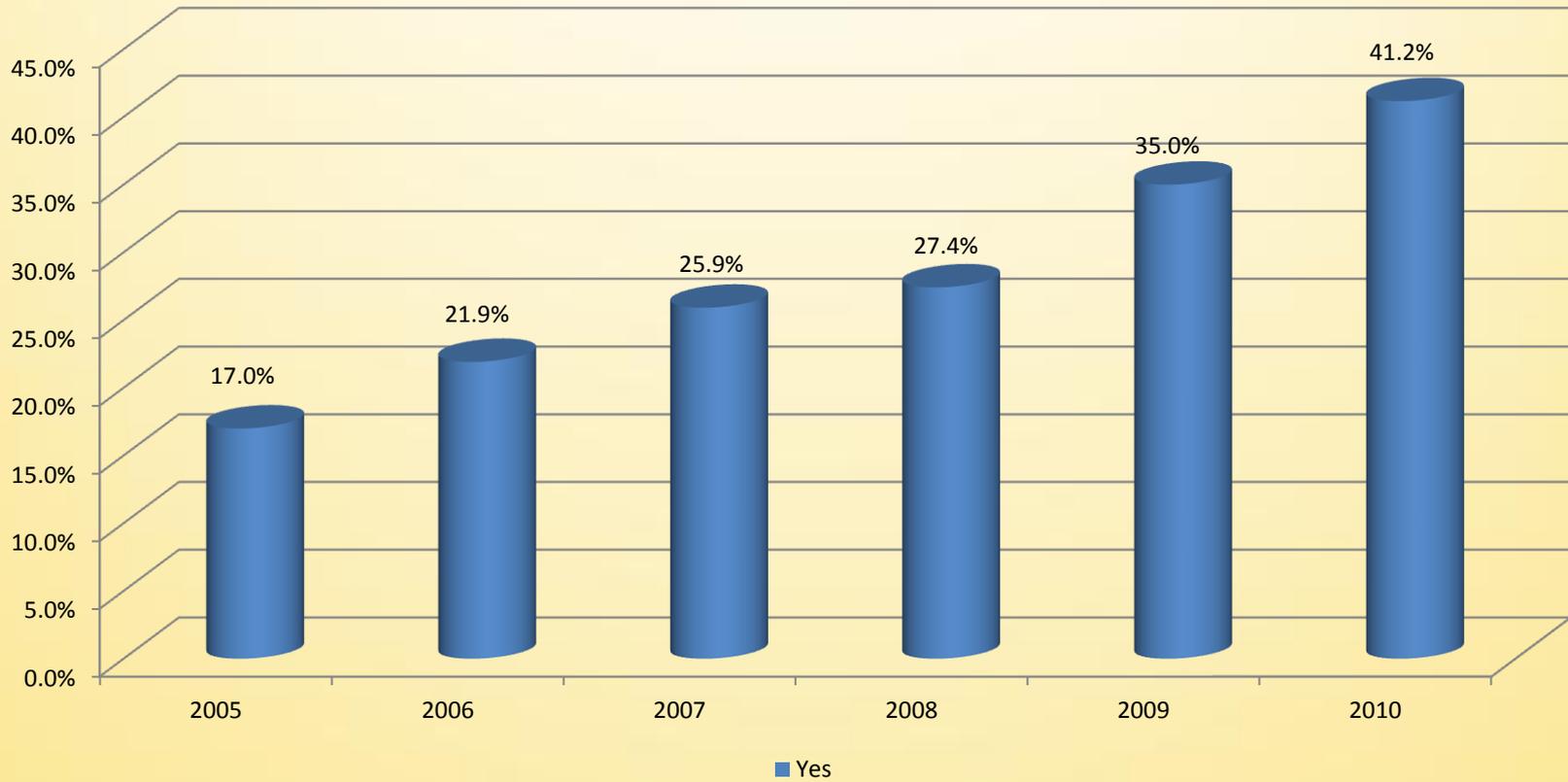
# Household income demographics

## Average Household Income



# Online indicators

## Use internet to plan trip?



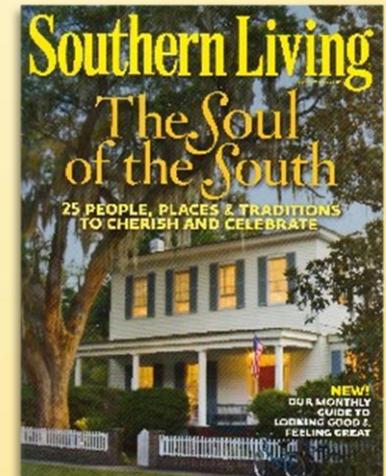
# Decision making and planning

How many weeks in advance make decision



# Case Study

- Popular publication: Southern Living
  - Average household income of readers: \$73,485
- PRIZM Study and visitor profile indicated household income between \$49,000 and \$62,000
- Research creates opportunity to focus



# Notable outcomes

Daytona 500 (n=431) (A)	Bike Week (n=649) (B)	Easter (n=197) (C)	Biketoberfest (n=232) (D)
Landed Gentry	Country Comfort <sup>CD</sup>	Landed Gentry	Landed Gentry
Country Comfort	Landed Gentry	The Affluentials	The Affluentials
The Affluentials	Middle America	Middle America	Country Comfort
Elite Suburbs	City Centers	City Centers	City Centers
Middle America	The Affluentials	Country Comfort	Second City Society
Second City Society	Second City Society	Second City Society	Middle America

- Daytona 500 visitors more affluent than Bike Week
  - Both contain segments that come year round
- Segments vary slightly by season
  - Landed Gentry and Country Comfort are consistent
- Additional New Smyrna research in report
  - Outcome of direct marketing project

# Conclusion – research driven

- Recommendation
  - Marketing plans must contain research that supports the overall direction
  - Boards are now focused on how the proposed direction is consistent with research
    - Market to the segments with the highest propensity to visit
  - Creates information that also supports the stakeholders in their efforts
    - Participating hotels will receive their data

# Leisure Marketing – Shift Resources

- Opportunity for direct “one-to-one” marketing
- SAG has worked with the authorities on products
- Current Examples

# Fishing Experience



## St. Johns River Fishing Escapes

**The West Volusia section of the St. Johns River boasts some of the best fishing Florida has to offer.** Largemouth black bass, warmouth, bluegill, specks, stripers and catfish abound. Not only is the fishing great here, but a day out on the soothing sun dappled waters of the majestic St. Johns will refresh your spirit!

### ***BASS FISHING at its BEST!***

Come to West Volusia County and experience the finest freshwater fishing on the St Johns River.

Our specially priced packages pair discounted accommodations with half or full day fishing trips. Boat rental specials are available at some properties.

Don't delay in booking your trip today.



# Southeast Volusia – New Smyrna

**NEW SMYRNA BEACH FLORIDA**

**WELCOME NORM,**

Find your fall adventure where small town, Old Florida charm, and 13 miles of hard-packed sand meet. This tiny beach enclave is home to anglers, artists, surfers, and eco-enthusiasts.

Book one of our exclusive vacation packages and see first-hand why *National Geographic* readers voted this one of the World's 20 Best Surf Towns. See you in New Smyrna Beach!

**TELL-A-FRIEND**

**SHARE YOUR THOUGHTS**

Confirm your email address for access to destination information and exclusive offers!

**SUBMIT**

**Special Offers**

**LUXURY COUPLES**

**FOR LESS ON A BUDGET**

**HOT DEALS**

**SHOP & DINE**

**ACCOMMODATIONS**

**ACTIVITIES**

- SVAA and SAG are finalizing a direct marketing/research project that will launch soon. Accommodators and Hotel/Bed and Breakfast have participated. A targeted/research based database of 20,000+ potential new visitors will be targeted.

# Halifax/Daytona



The Daytona CVB recently used this direct marketing technology to gain an understanding of potential visitor's interest. In the process of developing a highly targeted database.

# New Focus – Direct Marketing

- Use research to pinpoint target
  - Example – a few million of the top two segments reside with a 200 mile radius
  - Use targeted lists – market experiences directly
    - Measureable
    - Requires state of the art fulfillment
    - Test and refine experiences
  - Continue other marketing vehicles
    - More emphasis on direct one-to-one
    - Media decisions based on research
  - County wide experiences
    - The visitor doesn't care about borders

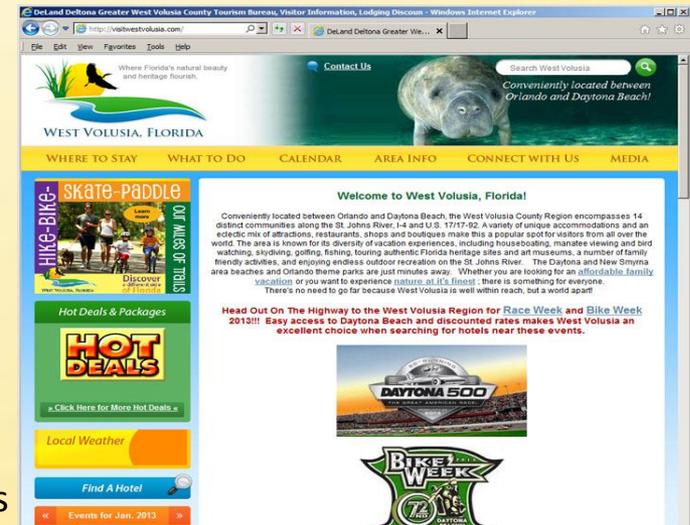
# Shared Services

- SAG met with executive directors and staff
  - Analyzed current structure
  - Reviewed duties
- SAG worked on specific programs
  - One-to-one marketing
  - Understanding the need for support
- Evaluated breadth of responsibility
- Singular organization was reviewed
  - Could the regional focus remain?

# Shared Services cont.

- Opportunity to provide centralized support
  - Maintain regional decision making
- The following areas present the opportunity:
  - Online support – shared content
  - Experience/Package Selling
  - Creative Services
  - Event database/calendar
  - Social Media
  - Research
  - Finance and Administration
  - Common Software Platform
  - Reporting/Measurement

# Online support



- Online support – shared content
  - Singular server houses all content
  - Creates opportunity to cross promote
  - Delivers consistency in quality and technology
  - Decisions on content used remains with the authorities

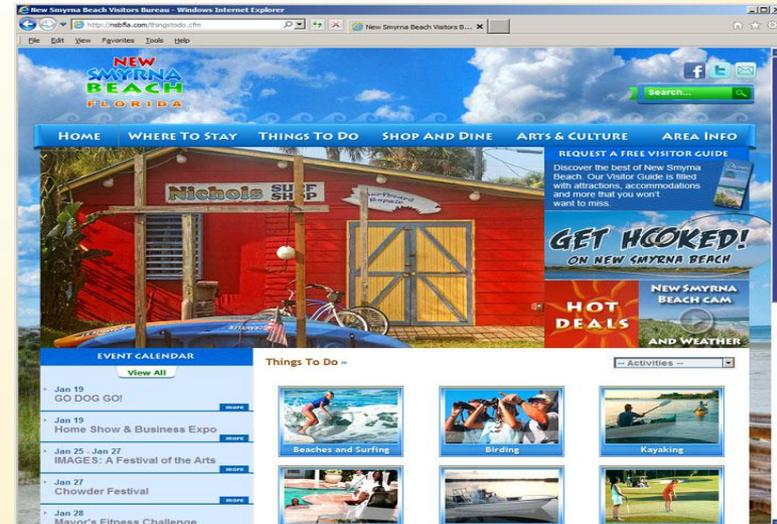
# Experience / Package selling

- Fulfillment and ease of purchase is important
  - Internet/direct marketing – important part of future
- Singular reservation/fulfillment platform
- Marketing and product development decisions remain with the authorities
- Promotes the opportunity to include county wide experiences

# Creative Services – leverage media buy

- Opportunity to have access to quality designers
- Look and feel may be different
- Evaluate opportunities to save on media buy through joint purchasing

# Activity event database/calendar



- Central database for entering events
- Can sort for web portals
- Encourages cross promotion
- Educates prospective visitor on the wide range of activities

# Social Media



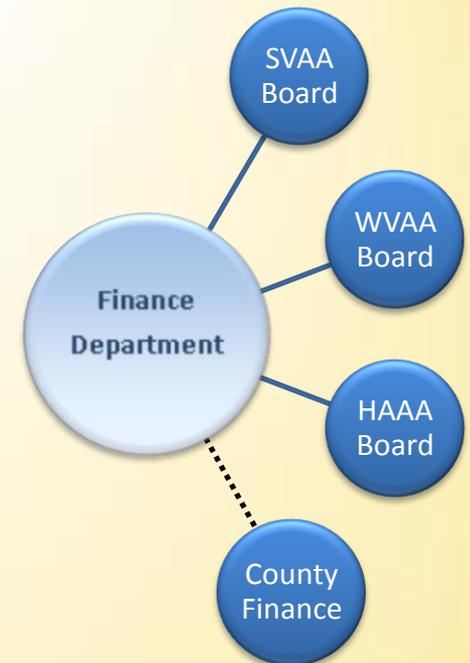
- Takes resources to maintain activity and grow engagement
  - Challenging to create new ongoing contact
- Share content on Facebook page
- Share social media staff
- Maintain unique messaging

# Research

- Currently minimal data for West Volusia and Southeast Volusia
- Create an annual joint research plan
  - Ability to refine future targets
- PRIZM study creates a baseline
  - Demonstrated unique characteristics

# Finance and Administration

- Centralized Accounting Office
  - Create standard financial statements
  - Give reports to respective boards
  - Create a working relationship to county finance
  - Ensure consistency in procurement practices
  - Clear division of duties
  - Executive directors have more time to focus on marketing



# Common Software – Reporting

- Institute common tourism software for the three authorities
- Supports common reporting and provides support in database management, leisure marketing, web content, accurate stakeholder information
- Standardize reporting

# Reporting and Measurement

- Common Metrics – examples
  - Room nights generated
    - Leisure
    - Group
  - Direct spending generated
  - Track targeted brand awareness/marketing efforts
    - Conversion study – common methodology
  - Overall economic impact

# Sample Report

- Monthly Report will inform stakeholders on key metrics and performance
- Distribution to Elected Officials and stakeholders
- Designed to inform and demonstrate accountability



## Tourism Marketing Report

February 2013

### Room night generation - leisure marketing

FORECASTED 2013 CONSUMED ROOM NIGHTS - AS OF JANUARY 2013								
Advertising Authority	Room Nights Generated		Goals			Year-end Goals	Variance	
	Month	Year-to-Date	Goals	Variance	Year-to-Date		Variance	% of Goal
Halifax								
Southeast								
West								

### Room night generation - group sales

ROOM NIGHTS BOOKED - JANUARY 2013								
Advertising Authority	Room Nights Generated		Goals			Year-end Goals	Variance	
	Month	Year-to-Date	Goals	Variance	Year-to-Date		Variance	% of Goal
Halifax								
Southeast								
West								

### Total room night generation

2013 ROOM NIGHTS - JANUARY 2013									
Advertising Authority	Room Nights Generated			Goals			Year-end Goals	Variance	
	Month	Year-to-Date	Room	Goals	Variance	Year-to-Date		Variance	% of Goal
Halifax									
Southeast									
West									

### Economic impact - direct spending

Advertising Authority	Visitors			Goals			Year-end Forecast	Variance	
	Month	Year-to-Date	Direct Spending	Month Direct Spending	Year-to-Date Direct Spending	Variance		Variance	% of Goal
Halifax									
Southeast									
West									

### Hotel/accommodator occupancy

Advertising Authority	Monthly Occupancy	Year-to-Date	Variance vs. previous year
Halifax			
Southeast			
West			

### New marketing activities

Advertising Authority	Monthly Activities
Halifax	
Southeast	
West	

# Improve results – maintain decision making

- Decisions remain with the authorities
- Increased marketing effectiveness
- Consistency in reporting and metrics
- Compliance in the admin/finance areas
- Implementation
  - Determine structure for support

# The opportunity to transform



# Group Sales and Marketing – Ocean Center

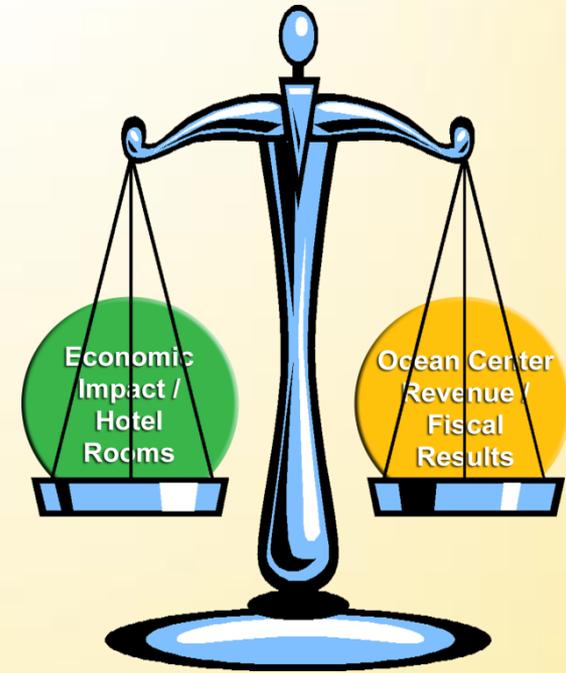
- Broad based interest in improving results – balance goals
  - Financial performance
    - Revenue
    - Reduce need for subsidy
  - Economic impact
    - Room nights
    - Direct Spending
  - Impetus for constructing the Ocean Center
    - Economic Generator
    - Consider deficit in terms of investment

# Functionality is most important

- SAG has recommended a series of functional improvements
  - Focus on functionality
  - Most effective structure
- Collective mission and universal goals
- Reported Consistently

# The Balance

- Economic Impact
  - Direct spending
    - Hotel rooms
    - Restaurants
    - Retail
    - Job creation
  - Tax generation
- Ocean Center Revenue/Fiscal Results
  - Rental revenue
  - Food and beverage
  - Other services



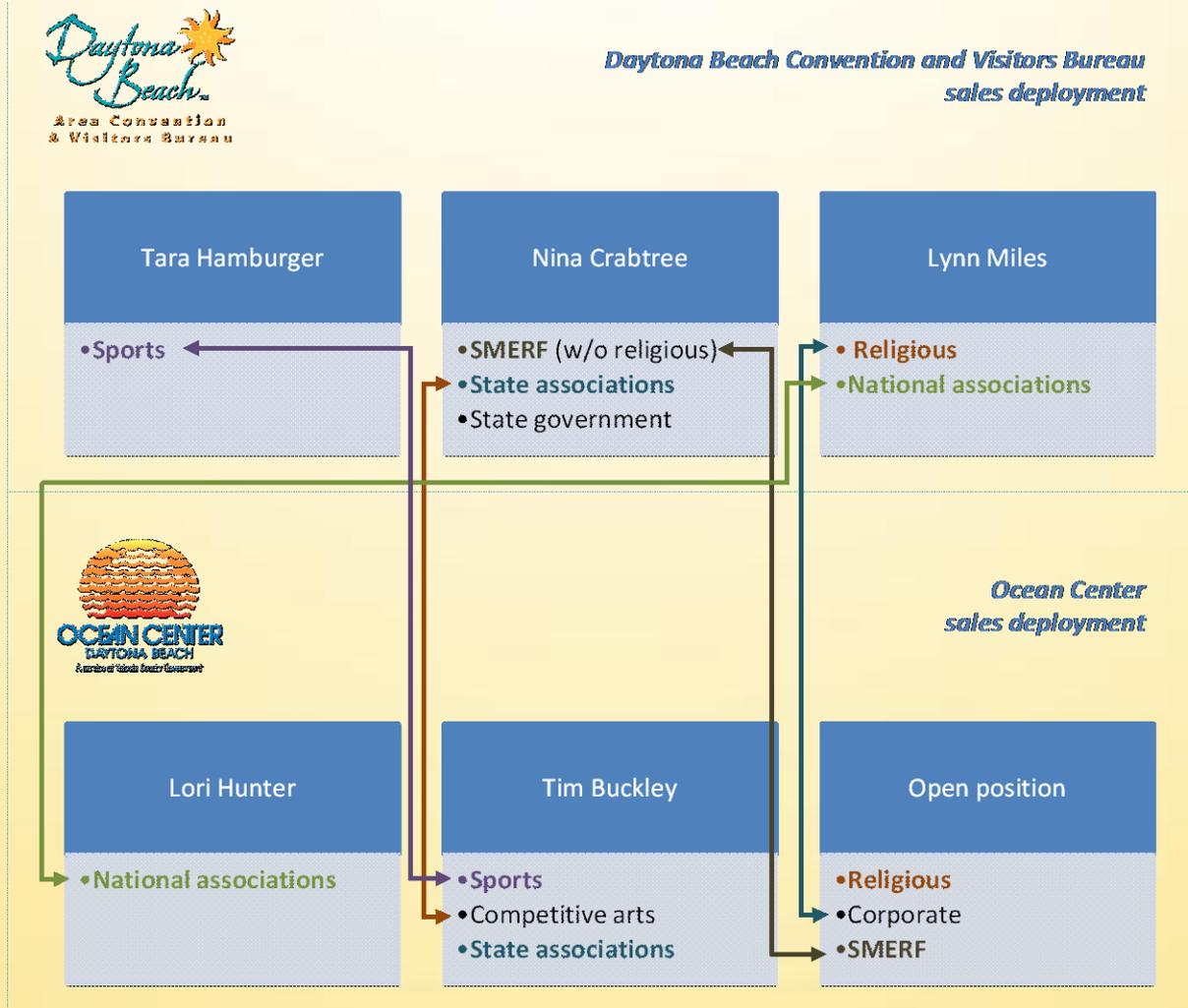
# Collective mission – Universal goals

- Goals should be shared by everyone involved – examples:
  - Economic impact/direct spending
  - Room night generation
  - Ocean Center revenue
  - Attendee/client satisfaction
  - Ocean Center profitability

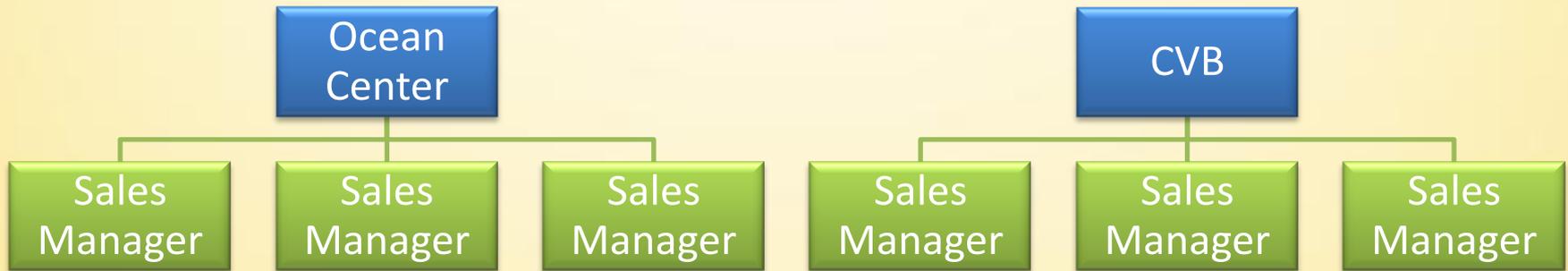
# Prioritization of events – Booking policy

- Collaborative process – Prioritization
  - “Highest and best use” determined
    - Citywide conventions
    - Consumer shows
    - Social events
  - Recommend Prioritization Session/Committee
- Agreement on the overall strategy
  - Booking Parameters determined
  - Current Booking policy needs to be refined
    - Continued lack of understanding

# Current deployment – overlap exists

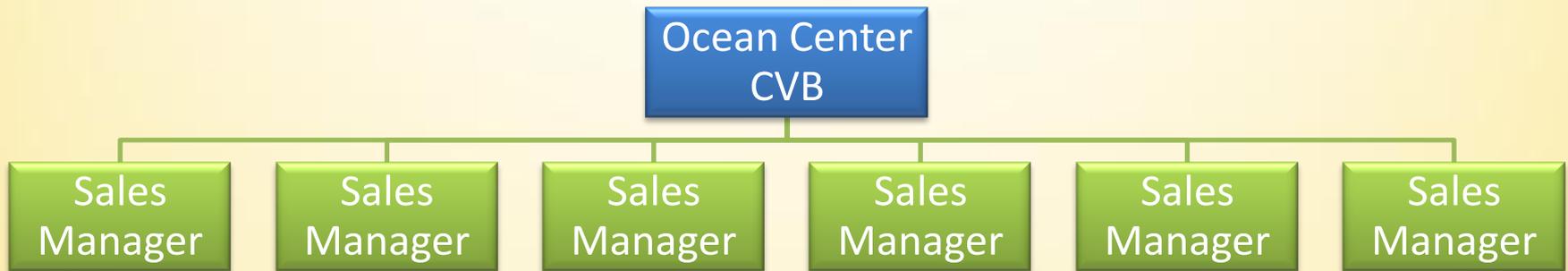


# Current Organizational Chart



- Currently the Group Sales Managers are on two independent teams with no shared goals

# Future – Seamless team



- Important to have all sales managers focused on common goals
- Opportunity to have a common incentive plan
- Coordinated market deployment
- Accountability to achieve agreed upon team goals

# Functionality Informs Structure

- Focus on implementing new functionality
- Designed to maximize and organize resources
- Ensure accountability
- Transparency
- Agreed Upon Priorities

# Singular Marketing Plan

## Outline

- Industry trends – economic indicators
- Research results – ongoing activity
- List of joint sales activities
  - Trade shows
  - Sales mission
  - Familiarization (FAM) trips
- Joint advertising plan
- Targeted market segments
- Public relations strategies
- Stakeholder communication plan
  - Joint reporting
  - Audience
- Online strategy
- Joint goals
- Holistic group sales and marketing budget

# Deployment Plan

- What group markets will create the highest return?
  - Religious
  - State association
  - National association
  - Sports
  - Competitive arts
  - Social, military, educational, religious and fraternal markets (SMERF)
  - Corporate
- Research based – conduct meeting planner survey
- Eliminate duplication

# Maximizing Marketing Channels

- Public relations
- Advertising
- Singular database
- Online marketing – singular web portal

# Advertising Example

- Ocean Center Marketing
  - The opportunity for collaboration

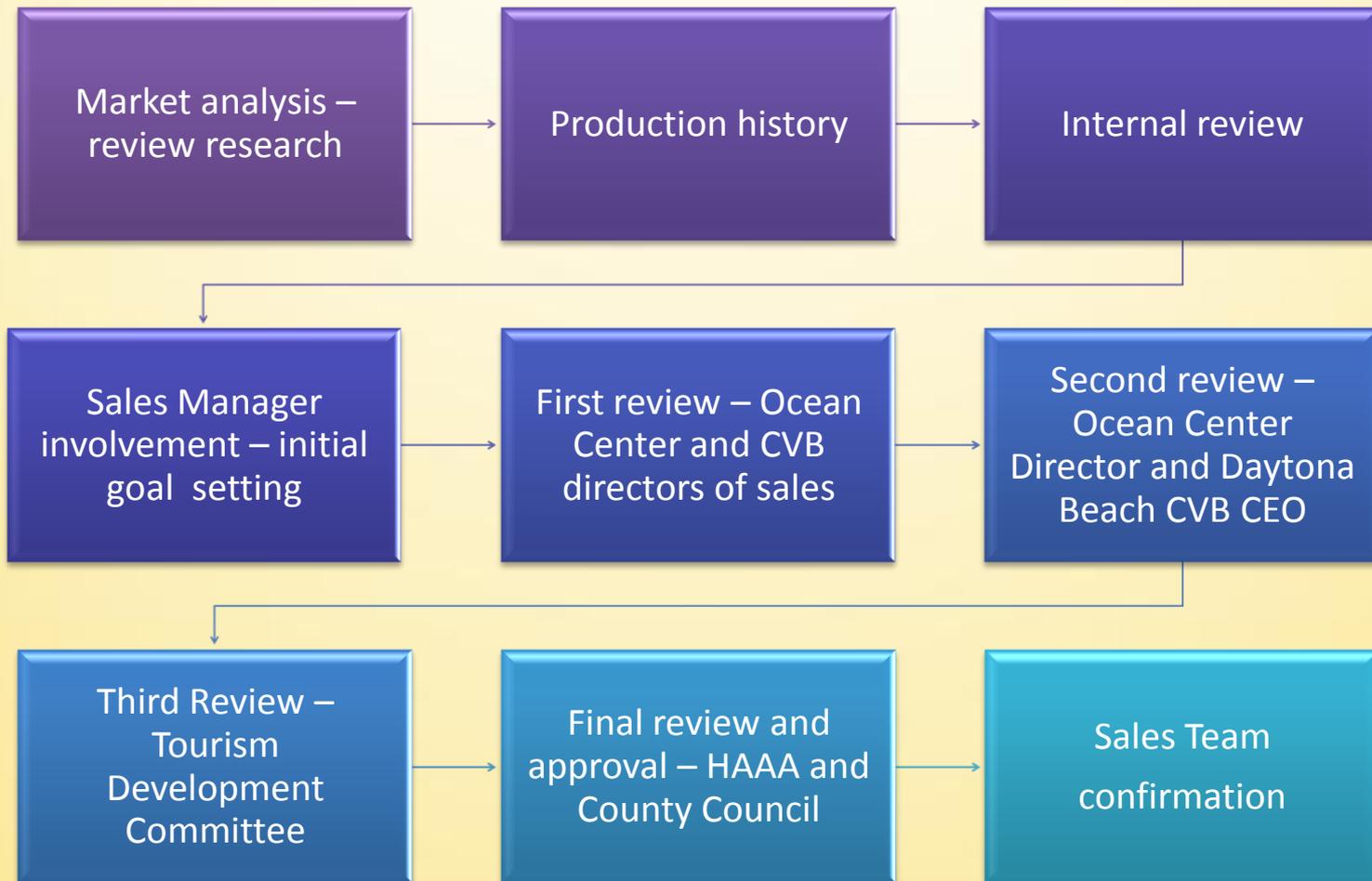


# Current websites

- Currently two meeting planner sites
- Opportunity to create a singular experience



# Holistic Goal Setting – Collaborative



# Sales Incentive

- Create a plan for all sales managers
  - Reward outstanding performance
  - Sample

Incentive payout schedule	
Percentage goal achievement	Percentage incentive compensation
100 percent	10 percent
105 percent	17.5 percent
110 percent	25 percent
115 percent	32.5 percent
120 percent	40 percent

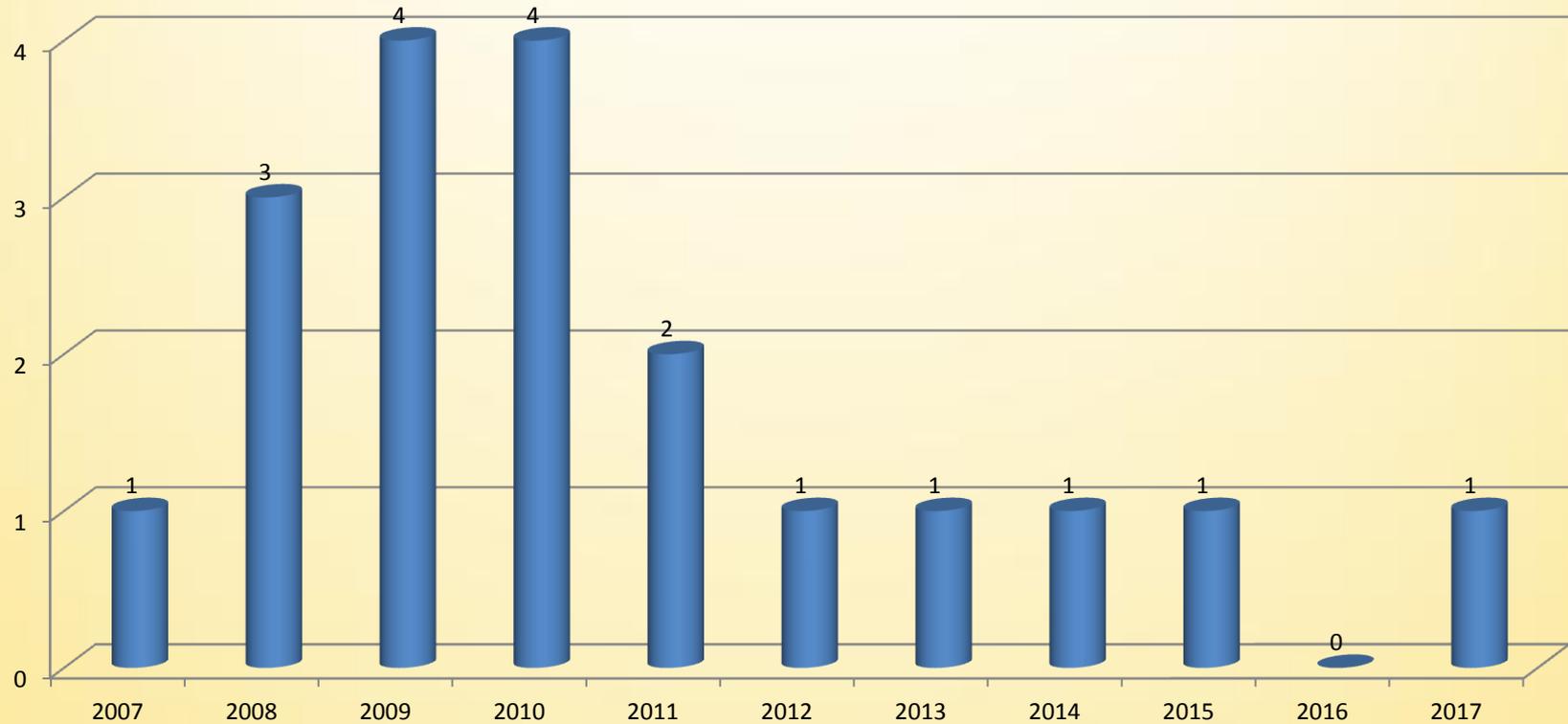
# Sales Performance Plan

- The following is an overview of a recommended approach:
  - Goals are determined by calendar year.
  - Uses a nine-month performance monitoring period. The nine-month period is ongoing or a rolling period of time, using three-month periods or quarters.
- Minimum sales performance goal components:
  - Minimum 85 percent conversion of targeted room nights in a rolling nine-month period.
  - Minimum 85 percent achievement of Ocean Center revenue goals (revenue is defined as food and beverage, facilities use, ancillary services, etc.)
- Ensures consistent performance oversight

# Highest and Best Use

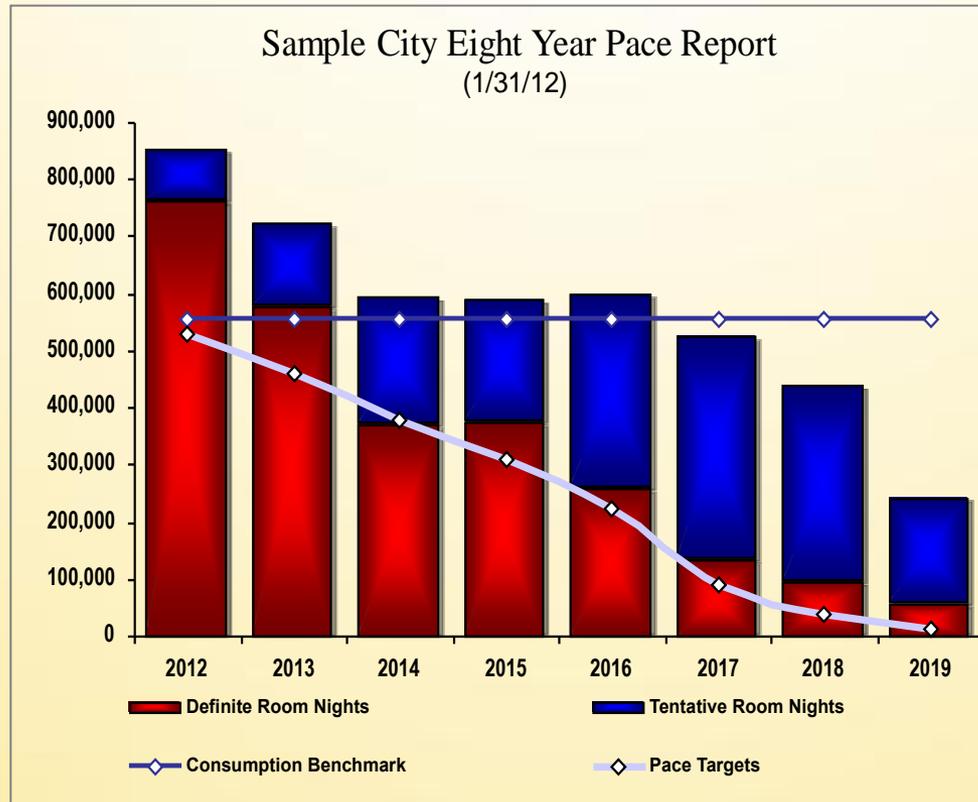
- Consensus in discussions – Citywide Groups
- Definition
  - Using a minimum of three Volusia County hotels
  - A minimum of 1,000 rooms on the “peak” night (the largest need for hotel rooms on one night during the conference or convention)
  - 5,000 room nights requested or blocked
  - A range of attendees from 2,000 to 5,000
- May require flexibility to compete

# Citywide Conventions – Future Bookings



- This chart demonstrates the opportunity to increase future citywide convention bookings

# Future Production – Reporting



- This report creates a focus on future timeframes and important soft periods that need sales focus
- Information important in determining strategy for negotiations

# Impact of Proposed Plan

- Consensus – impact of increased resources
  - Three to five citywide groups annually
- Joint accountability
- Functionality is the key – informs structure
- Agreed upon balance of economic impact and fiscal results
- Maximization of collective resources
- Reporting results to all stakeholders

# Industry Overview – Customer Focus



*A joint “best practices” paper driven by the two national associations representing convention and visitors bureaus and convention centers has this statement in the introduction:*

*One underlying objective that cannot be overstated: provide the destination customer with a seamless positive experience from the onset of the sales cycle through move out.*

- The industry has focused on the customer experience
- Currently the customer may meet two representatives
- Recommended collaboration between Convention Centers and CVB's
- Maximization of collective resources with a common set of goals

# Importance of Events

- Important overall tourism strategy
- Create metrics for review
  - Economic impact – direct spending
  - Hotel room night generation
  - Value in overall marketing as a visitor destination
  - Attendees are a valuable year round market
  - Quality of life for residents
  - Security or safety needs
  - Event management structure
  - Cost associated with event support
- Event strategy becomes part of the annual planning
  - Funding ties to delivery of metrics



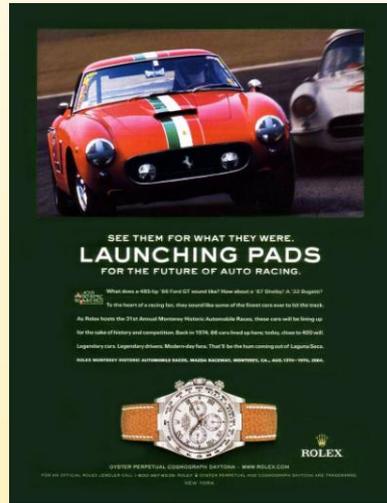
# Sports Commission

- SAG spoke with community stakeholders
  - Recommend shifting resources
  - Create Sports Commission focused on Volusia County
  - Volusia county not getting its share of sporting
  - Unify all interested organizations



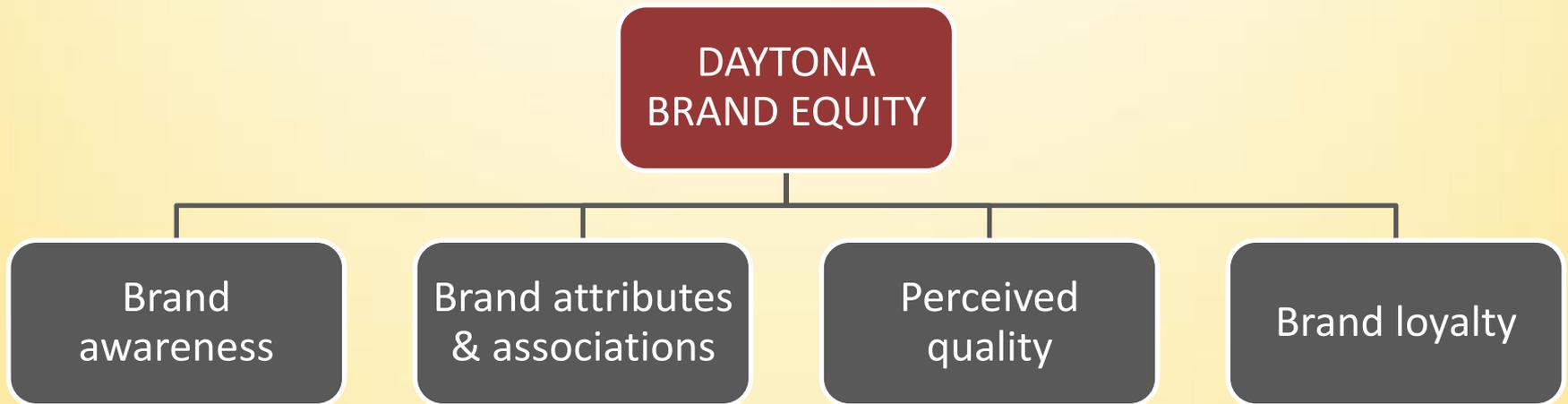
# The Brand Dilemma

The Daytona name has been used on a wide variety of products



# Brand Equity – Daytona

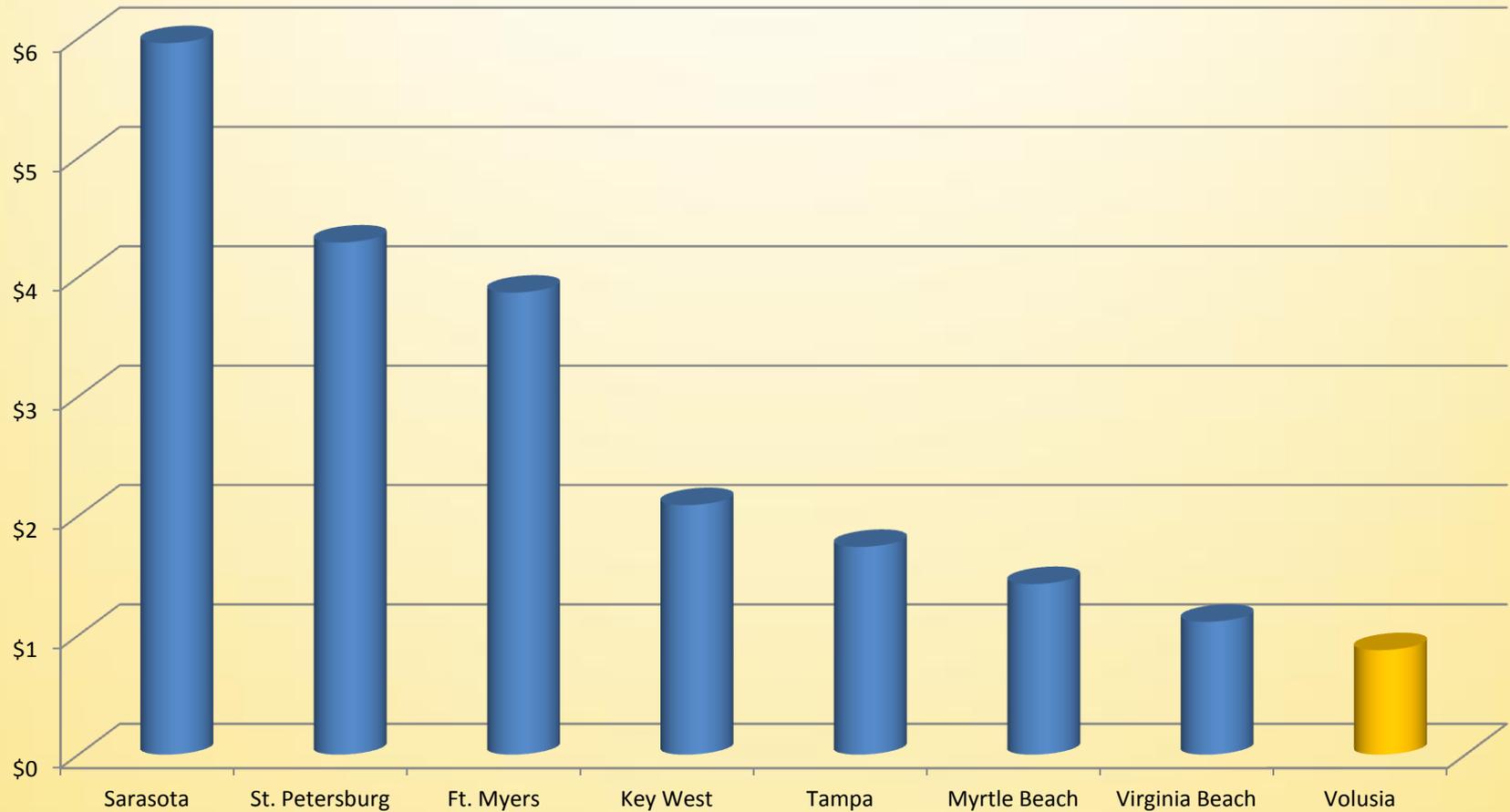
How do we evolve and capitalize on the Daytona brand?



# Funding

- Reviewed neighboring counties and similar destinations
  - Ft. Myers
  - Key West
  - Virginia Beach
  - Sarasota
  - St. Petersburg
  - Tampa
- Looked at many comparisons to evaluate funding levels

# Marketing budget per overnight visitor



# Funding – opportunity

- Opportunity to explore options
  - Industry Supported
    - More inclined to support with clear accountability
      - Business Improvement Districts
  - Redistribution of Bed Tax dollars

# Implementation

- Short term Action – within 90 days
  - Institute annual plan requirements
    - Research driven plan
    - Metrics and measurement
    - Collaboration and leverage
    - Event plan
  - Creation of Tourism Product Development Task Force
  - Begin implementation of group sales functionality

# Summary of Recommendations (cont.)

- Medium Term – 3 to 6 months
  - Implementation of new governance/nomination process
  - Implementation of the holistic group sales and marketing plan
  - Begin implementation of the shared service model
  - Implementation of the stakeholder communications plan
  - Development of initial plan by Tourism Product Development Task Force
  - Report on new marketing direction – advertising authorities
  - Begin Development of the Volusia County Sports Commission

# Summary of Recommendations (cont.)

- Long term – 1 to 2 years
  - Evaluate new funding possibilities
  - Conduct brand evaluation with recommendations

# Conclusion – leadership and focused implementation

- An opportunity to support the transformation of tourism in Volusia County
- Recommendations are achievable
  - with leadership
- Elected officials, authority boards, industry leaders, community leaders, partner organizations, and tourism staffs have an opportunity to lead the industry in a new direction
  - Not let “how” get in the way
- Implementation needs specific focus and oversight

# Inaction

- Results will be similar
- Competitive position will deteriorate
- Community interest and involvement will wane further
- Economy will suffer

# Action – Leadership

- The numbers will increase
- Information and engagement will increase quickly
- Accountability will be clear
- Investment will come
- The industry will transform

# Questions/ Comments

- Draft Report
- Receive input
- Finalize Recommendations

Thank You

**Strategic** Advisory Group  


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