

Tribe + Purpose



tribe + purpose

Tribe + Purpose

Final Report

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Introduction and BI Overview

The Bachelor of Innovation (B.I.) is a degree within the University of Colorado of Colorado Springs (UCCS). The B.I. degree is unique in the sense that it is not your traditional way of teaching. Students learn through an innovation process and learn to turn their ideas into impact. It has a specific category that benefits clients and gives students a chance to innovate under different circumstances. The main purpose of the B.I. program is to teach students how to think like an innovator and get on the court through brainstorming and being creative to solve problems. The program emphasizes working with a team to accomplish goals and deliver a product to the client. Innovation occurs when people with diverse backgrounds collaborate and generate ideas. The B.I. faculty educates student for success by getting them out of their comfort zone. Students from all disciplines are welcome, and this interaction brings out even more ideas to expand the result of deliverables. The B.I. program allows students to take innovation teams courses at three levels to assist clients to prepare them for the real world. Upon accepting the client, students are put together in a team led by two upper-level entrepreneurs who have had previous experience and excelled in team development. The team members are chosen by the leaders based on their majors and skills mentioned. Afterward, the teams will work diligently to achieve success and something they can be proud of and accomplish ways to help their clients.

Executive Summary

Purpose: To act as consultants for a business/leadership coaching company that specializes in elite leadership strategies and tactics learned as a Green Beret, a special forces unit that specializes in effective small group operations in situations that are dangerous and high stress. These strategies are meant for customers to overcome the challenges of small business and more importantly to find clarity of purpose. Tribe + Purpose is considering growing their coaching seminars from a single individual to groups of 8-10. The goal is to surround these 8-10 people with likeminded people that can help all of them grow to a place where they ultimately effect positive change in their communities. The challenge that faces the organization is identifying a target niche market and attracting the customers that would benefit the most from the experience that the company leadership has to offer.

Stated Goals:

- **Customer Avatar:** Conduct market research for Tribe + Purpose through a market survey. Construct a customer profile that includes the customers values, hobbies, and lifestyle.
- **Website Improvement:** Conduct market research on what the customer would want to see on a business coaching website. Research competitor websites and recommend small changes that will improve the customer interactions.
- **Marketing Campaign:** The team will research effective marketing campaigns, competitors, and make recommendations to Tribe + Purpose leadership for the implementation of said campaigns. Focused research using a marketing plan that utilizes Google Ads the framework for the marketing campaigns.

Identification of Successes for Client

Description: I am submitting the project to develop the process, identify market space, and deliver 25 years of Special Operations and seven years of business leadership training and mindfulness to corporations and individual business leaders. After three years of business and Tribe + Purpose has had a handful of referrals. The company needs to expand and grow to a sustainable level.

Tribe + Purpose, LLC is a Service-Disabled Veteran Owned family business headquartered in Monument, CO.

Our mission is to create a legacy of leaders who lead great organizations. This is under the belief that great organizations create better communities, and with better communities, we will have a better world.

We believe this is crucial because our mission's end state is to create a better world. We know we must touch and connect with more people to achieve the outcome of our mission.

The project will require:

- 1) Interpretation of Special Operations leadership techniques and fundamentals to corporate America jargon.
- 2) Identification of niche for the primary customer base
- 3) Market research on language and to use to bring in clients
- 4) Price point for products
- 5) Identification of ancillary markets, i.e., junior managers, new hires, etc.

I look forward to challenging the Bachelors of Innovation students and helping them become successful following their graduation from UCCS.

Statement of Accomplishment

Within the Scope of Work, the team set out a timeline of deliverables that the team has been able to accomplish over the semester, which is found in Appendix A. The team started off by researching and aggregating research results pertaining to market segments, internet marketing and pricing to present to the client. From the research results, the team was able to create four customer profiles that helped Tribe + Purpose understand what their target customers look like through their backgrounds, demographics, goals, challenges, values, and hobbies.

Appendix B

The team had a challenging time identifying systems in the company that would lend themselves to the marketing disciplines in the company. To overcome this challenge the team worked on a Strengths, Weakness, Opportunity, and Threats analysis (SWOT). The SWOT was a valuable exercise in gaining internal information about the company which helped further shape our customer profiles, surveys, and marketing recommendations. The team understood the value of aligning the company mission with the strengths of the company. We needed to find opportunities for the company and decided that a survey was the best way to approach this. The full SWOT can be found in Appendix C.

To gain further clarity on the target customer, the team worked with the client to design questions for two surveys. One was directed at college students while the second was geared toward business owners. The goal was to dive deeper into market participation, social media use, and purchasing decisions to name a few. The results displayed in Appendix D & E were valuable to both team and client. The team gained insight into the motivating factors and interests of the potential customer that Tribe and Purpose were wanting. Through the college student survey, we discovered an additional market that Tribe and Purpose can tap into that aligns with their vision of “know your tribe”. A group of young professionals seeking meaningful purpose from the

onset of their careers. The client had a positive response to the results and beyond that the survey generated leads for Tribe + Purpose.

With the results of the surveys, the team provided lead magnet recommendations to help Tribe + Purpose reach their target audience online through the social media platform Facebook. The team pivoted to Facebook from Google Ads which was initially part of our deliverables. The team chose this change because we concluded our products would be more readily installed if we made it easier for the client. The intention of the lead magnet is to attract the target audience to a sales funnel with improved imagery and reduced jargon. The magnet captures demographic information so a guide in story format can be sent to the lead. Thus, allowing Tribe and Purpose to further guide their target audience to the next step in the funnel which is interacting with the client. The team created a workbook that Tribe and Purpose can use that will take the relationship from interacting to converting the customer into a paying client. The team expects one approach would be to offer a workshop that would take paying customers through each of the five steps while being guided by the instructors at Tribe and Purpose. The intent of the workbook would be used as a tool to generate revenue while attracting clients to higher-priced coaching products like Know Your Tribe and Power Tribe. The workbook is designed to identify both the needs of the client and screen candidates that would be interested in other products.

The team believes Tribe and Purpose has an opportunity to positively impact their business through strategic partnerships that can be created by attending networking events. We created a list of networking events in both Colorado Springs and Tucson that present opportunities to connect with prospects for Power Tribe in order for Tribe and Purpose to become influential in the community.

Lastly, research convinced the team that a short video being added on the home page of Tribe and Purpose website would improve interactions on the page. The intent of the video is to

demonstrate the value of Tribe and Purpose through the lens of their past clients. The video should reflect on the value Tribe and Purpose brings to their clients. Ideally, ending with a past client saying they would recommend other people to Tribe and Purpose. Leading us to our next segment recommendations and innovative discussion.

Recommendations and Innovative Discussion

Reflecting on the semester, the team has discovered that Tribe and Purpose have a well-constructed foundation and have the infrastructure needed to scale their business. We believe that through continued partnership with the university, constructing referral focused marketing and enhanced online visibility Tribe and Purpose can accelerate their growth.

We recommend that Tribe and Purpose continue their partnership with the BI by bringing on a future team in the fall. The future team should be leveraged by focusing on discovering the value that past clients have found in working with Tribe and Purpose. This will give insight into what areas of service Tribe and Purpose should dive deeper into providing.

Next, is a referral focused marketing approach. This only makes sense since the team will be spending time researching past clients and would provide an ideal opportunity to annotate positive feedback. The vision would be to capture those experiences in a high-quality format that can be edited into several smaller segments and advertised.

Finally, enhancing the online visibility of the company through search engine optimization. For example, Otis, the owner of Tribe and Purpose, publishes valuable content in the company newsletter that is consistently sent out every Monday morning. We think the future team could research key words that Otis could use in his newsletter relating to the topic he is writing about that would elevate their visibility online. A good platform for this would be Word Press as it works well with popular search engines like Google.

Conclusion and Discussion

Overall, Tribe and Purpose were excellent clients to collaborate with and helped us learn discipline and values throughout this semester. Both Otis and Camden McGregor kept a professional bearing towards each of the team members and valued any input given. Tribe and Purpose kept their word by honoring the meeting times set by the team by always having a representative of the company attend. Tribe and Purpose provided a safe space for the team to ask challenging questions and gave the team the autonomy to interrupt and translate those answers into actionable results. Furthermore, each team member is leaving this project with their own personal lesson learned, and, in the end, this partnership has created a win-win for both Tribe and Purpose and the BI team.

Appendix A: Scope of Work

Bachelor Of Innovation Team

Team Leads

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Background

Tribe + Purpose is a first-time client in regard to the Bachelors of Innovation program. Hence, we will be the first team to cooperate with Tribe + Purpose. Tribe + Purpose is an organization determined to provide leadership training and business advice to other leaders and small business owners. What separates Tribe + Purpose from other coaching services is concept of a tribe. Developing a community of leaders that are comfortable sharing ideas and implementing change both personally and professionally. This development will lead to positive sustainable change on a global scale. Tribe and Purpose do not currently have any relationships with UCCS

stakeholders. Furthermore, they have no connections to the BI program as neither owner has participated or attended the Bachelors of Innovation program.

Team member Ivan Sarmiento has prior experience/background in working with Special Forces organizations. Ivan understands the components that make up the Special Forces organization, their operation environment, and their up-tempo attitude necessary to complete the task at hand. Ivan Sarmiento is also specialized in aspects of team building and adaptable critical thinking necessary for any organization like Tribe + Purpose.

Project Information

Name- Tribe + Purpose

Purpose-To act as consultants for a business/leadership coaching company that specializes in elite leadership strategies and tactics learned as a Green Beret, a special forces unit that specializes in effective small group operations in situations that are dangerous and high stress. These strategies are meant for customers to overcome the challenges of small business and more importantly to find clarity of purpose. Tribe + Purpose is considering growing their coaching seminars from a single individual to groups of 8-10. The goal is to surround these 8-10 people with likeminded people that can help all of them grow to a place where they ultimately effect positive change in their communities. The challenge that faces the organization is identifying a target niche market and attracting the customers that would benefit the most from the experience that the company leadership has to offer.

Top three goals to complete

1. Customer Avatar- Conduct market research for Tribe + Purpose through a market survey. Construct a customer profile that includes the customers values, hobbies, and lifestyle.

2. Website Improvement- Conduct market research on what the customer would want to see on a business coaching website. Research competitor websites and recommend small changes that will improve the customer interactions.
3. Marketing Campaign- The team will research effective marketing campaigns, competitors, and make recommendations to Tribe + Purpose leadership for the implementation of said campaigns. Focused research using a marketing plan that utilizes Google Ads the framework for the marketing campaigns.

Detailed Description of Deliverables

Team Tribe and Purpose will work on assigned tasks and provide weekly updates of progress on the following items. The team will deliver a scope of work to the client that outlines the project details, expectations, and responsibilities to the client. Project assignments will be agreed on and clients will be briefed on who is responsible for each of the designated project deliverables.

Groups of two will be expected to do market research on their respective areas that will include but are not limited to customer profile, website suggestions, and a marketing campaign using Google Ads as a platform. Team members will take time to analyze their respective research and present actionable ideas to the client that the client can then implement using designated third-party vendors. Team members will also provide information that can be used to develop a strategic partnership through community resources like the small business administration, veteran, and university organizations.

Existing Conditions to environment

Projects Risks

Definition A project risk is an uncertain event that may or may not occur.

1. As a team, we fail to meet a certain timeframe to complete a task.
2. We do not get enough people to complete our survey and cannot complete our analyses to help guide Tribe and Purpose.
3. An unforeseen circumstance occurs, and we must pivot and adjust the timeline which can lead to more complications.
4. We may not find or be able to utilize as much networking events as we want due to COVID-19 or other complications.

Timeline

- February 13 of 2022
 - Scope of Work
 - Success Criteria- Develop a detailed scope of work that outlines stakeholders, goals, deliverables, timeline, and meeting expectations.
- February 14 of 2022
 - Project assignments
 - Success Criteria- Team members assigned to respective areas of work on the project.
- February 28 of 2022
 - Customer Profile

- Success Criteria Research peer-reviewed information that will contribute to 3 success customer profiles.
 - This will help us dial in on what we can do to further improve our client's branding and marketing.

- March 14 of 2022
 - Local Market Research Survey Results
 - Success Criteria- Survey 20 people who the team believes could be interested in Tribe + Purpose to complete a survey that identifies problem areas that Tribe + Purpose can assist with.
 - This will help us establish the type of people who would be interested in joining his group sessions. This survey would help confirm or deny the theory of top problem areas in business and identify proper pricing.

- April 18th of 2022
 - Calendar of events
 - Success Criteria- Create a Calendar of Networking events for small businesses that leadership can attend to further his influence their reach.
 - This is to help him find and research other businesses to whom he can help and collaborate with in the future.
 - Market Research website interactive tools
 - Provide peer reviewed information regarding the value of a single interactive tool that can be improved.

- This will assist visitors to the website with engaging content that will help move them through the sales funnel.
- Recommend marketing campaign using Facebook
 - Success Criteria- Research peer reviewed studies that measure the effectiveness of social media campaigns. Storyboard a campaign that can be implemented to bring more attention to Tribe + Purpose through improved messaging and by identifying the most effective key word searches pertaining to the customer profile.
 - This will assist tribe in purpose in focused marketing that puts relevant ads in front of interested customer profile.
- Website changes
 - The team will use research regarding interactive tools to suggest a single change to the website. And will provide the change to the client in a story board format.
 - This will make content more engaging and improve customer time spent exploring Tribe + Purpose.
- Final Report
 - Success Criteria- All members of Tribe and Purpose submit fixes for errors and agree to a definitive version. This will be the result of all our challenging work.
- April 25th of 2022
 - Dry run for presentation
 - Success Criteria- All members of Tribe and Purpose are prepared and confident for the presentation.

- May 2nd of 2022
 - Official Presentation
 - Success Criteria- Accomplish all tasks assigned & All members of Tribe and Purpose are ready for presentation.

Personal outcome What you want to get out of this?

- Ivan Sarmiento
 - What I want to get out of this is to learn how to grow and enjoy the experience.
- Javier Chacon
 - I would like to further improve my research skills to help further improve my attention to detail and also work on improving my time management. It will not only help the team but also help me in future endeavors to avoid adrenaline situations.
- Matt Raskob
 - I would like to improve my business skills as well as my time management. I also want to try to master working in a group effectively.
- Joshua Brisson
 - I would like to gain experience working with real world problem solving and idea generation as well as observing how different markets work and learning how social media presence can have an impact on companies and their presence in the market.
- Alyssa Walker

- What I want to get out of this experience is to improve my knowledge and skills in time management, communication, business skills, and to learn to be uncomfortably comfortable when handling real life problem solving.
- Caleb Nelson
 - I would like to learn problem solving in business applications about Tribe + Purpose. I'm majoring in Marketing and would like to gain more experience with creative solutions to marketing and sales.
- Joseph Ambuski
 - I would like to develop more confidence while leading a small group by practicing an authentic style of leadership. Improve communication skills and strengthen strategic partnerships in the community.
- John McCaffrey
 - I would like to improve my leadership skills so that I can manage a team effectively.

Meeting Agreement

The team will be meeting with the client every Monday at 12:30 in an available study room at the UCCS Kraemer Family Library. These meetings will be held over Zoom via email invite for one hour in which we will go round table and discuss successes, challenges, ways forward, and address any needs that Tribe + Purpose leadership can assist with.

Client Information

Client Name: Otis W. McGregor

Email: Otis@tribe-purpose.com

Phone: (719) 640-9722

Website: [Home • Tribe and Purpose for success \(tribe-purpose.com\)](http://Home • Tribe and Purpose for success (tribe-purpose.com))

Client Position: Chief Executive Officer

Client Application:

Description: I am submitting the project to develop the process, identify market space, and deliver 25 years of Special Operations and seven years of business leadership training and mindfulness to corporations and individual business leaders. After three years of business and Tribe + Purpose has had a handful of referrals. The company needs to expand and grow to a sustainable level.

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Appendix B: Customer Profiles

Mason Jones

Background

- Owner of an Accounting Consulting firm.
 - Opened business when he was 42 years old.
- Has 30 employees.
- Previously, served in the Air Force for 16 years.
- Went to college for 4 years.

Demographics

- Age 44
- Male
- \$60,329/yr
- Urban/Rural Location
- Married, 2 kids

Goals

- Savings
- Growing his business
- Instilling a productive environment

Challenges

- Has currently hit a plateau with business
- Trying to provide incentives and boosts for employees

Values

- Values Security and Time
- Values Leadership, strong work ethic, teamwork, and motivation



Hobbies:

- Hunting/Fishing
- Watching Sunday Night Game
- Golfing
- Going to Texas Steakhouse with friends and family

Obtaining New Customers

- Medium to High-Income / Urban-Rural Locations
- Small business owners.

Listed above is the first customer profile that represents the target demographic for Tribe and Purpose. Mason Jones represents the most common customer type for Tribe and Purpose which is a veteran from the armed services. Mason Jones' story begins when he went to the army at the age of 18 where he would serve in the Air Force for 16 years before deciding to take a different route in life. Using his GI bill, he would attend college to get a degree in business before heading off to work in the corporate world. Mason, however, wanted to go off on his own and experience a sense of independence. He wanted to be his own boss. Mason would decide to open his own accounting firm at the age of 42 and has since been the owner of said accounting firm, having a strong staff of 30 under his belt. We believe that Mason Jones is the ideal demographic for Power Tribe for several reasons.

One reason is that Mason Jones served in the Air Force. Otis, having spent time in the army, can relate with Mason on time spent and form a deeper connection and hook with Mason. In addition, Otis and Camden's style of coaching would work in the favor of another laid back veteran. Additionally, Tribe and Purpose have plans to do retreats and conferences. Mason Jones given his openness to being out and mingling with others would be ideal for said conferences as

he enjoys being active. In addition, him being a small business owner would also play into the favor of his attending the coaching.

According to our survey results as well, small business owners like Mr. Jones have provided responses that would benefit from career coaching, further proving that Mason Jones is a prime target demographic. However, the current pricing for Power Tribe (\$2000) does not favor Mason Jones as shown by our survey results. To tap into the market of consumers such as Mason, Tribe + Purpose will have to lower their pricing to better accommodate their target.

Lawrence Field

Background

- CEO of an Enterprise
 - Became CEO at the age of 53.
 - Working on getting enterprise ahead of competition.

Demographics

- Age 55
- Male
- \$126,815/yr
- Urban Location
- Married, 4 kids, 2 grandkids

Goals

- Hitting Margins
- Instilling a productive environment
- Creating a plan of action for next quarter

Challenges

- Team isn't meshing well with each other
- Budget costs have tanked productivity

Values

- Values Innovation
- Values Time Management
- Values strong work ethic, teamwork, and drive.



Hobbies:

- Wine tasting
- Golfing
- Theatre
- Going to the country club

Obtaining New Customers

- High-Income / Urban Locations
- CEO of enterprises

The next customer profile that Tribe and Purpose could potentially target is that of Lawrence Field. Lawrence Field represents another target demographic for Tribe and Purpose which is that of a CEO. Lawrence Field is a CEO of a moderately sized enterprise and from being a CEO, it has shaped how he goes about living his life. To maintain the image of being a high-up CEO, Lawrence goes to country clubs to converse with other higher ups and spends his free time wine tasting, golfing and even attending plays at the theatre with his family. The price point of \$2000 would better fit Lawrence Field given that similar businesses like Tribe + Purpose charge for less

for CEOs like Lawrence. However, Tribe + Purpose has voiced that smaller business owners are their prime target, making Lawrence Field a secondary target demographic.

Sally Parker

Background

- Graduate Student from College
 - Graduated with Masters in Business Administration at age 26
 - Looking for guidance on where to go with life.
 - \$62,000 in debt

Demographics

- Age 27
- Female
- \$46,301/yr
- Urban Location
- Has a boyfriend.

Goals

- Creating a budget
- Saving for a house.
- Work/life balance

Challenges

- Handling student loan debt.
- Deciding on where to go in life.
- Opening a business or getting a job.
- Creating time for herself.

Values

- Values Ambition
- Values Organization
- Values family oriented ideals, kindness, and open-mindedness.



Hobbies:

- Hiking
- Biking
- Getting hair & nails done
- Spending time with friends on a Friday Night

Obtaining New Customers

- Low-Medium Income / Urban Locations
- College Students

The next customer profile is Sally Parker. Sally represents the target demographic for Know your Tribe. Know your Tribe is catered for college students and based on survey results for college students, there is a market for career coaching for college students. Sally helps represent this market as she is a new graduate from college and is looking for guidance on where to go in her life. She is unsure of where to go in her life as education and school often brings structure to one's life. Sally would benefit from Tribe + Purpose as they would help Sally narrow down where she would want to go in life, giving her a plan of attack. If Sally does start a business, this could prove to be a sales funnel as Sally having done Know your Tribe, may come back for more assistance in Power Tribe to help further the progress of her business. While Sally was not a primary demographic to begin with, the results of our survey has caused a pivot in the pursuit of furthering the Know your Tribe program.

Tanner Williams

Background

- Undergraduate student from college
 - Graduated with a Bachelor's in Business at the age of 22.
 - Took a gap year to travel and experience culture.
 - Son of corporate parents.

Demographics

- Age 24
- Male
- Urban City Area
- Single

Goals

- Start his own business
- Grow from the shadow of parents
-

Challenges

- Unsure of how to start a business
- Trying to be independent
- Unsure of where to go.
- Trying to solidify his purpose

Values

- Values money
- Values time and time management
- Values independence



Hobbies:

- Mountain Biking
- Lacrosse
- Golf
- Hockey

Obtaining New Customers

- High Income / Urban Locations
- Recent College Graduate

The last customer profile is that of Tanner Williams. Like Sally Parker, Tanner Williams represents the college target market. Unlike Sally, Tanner was born to rich parents who paved his path in life and paid for his college. Given that his parents have created this veil over his life, Tanner wishes to escape from the cover of his parents and make a name for himself. Because of this, Tanner wishes to start his own business to recreate his parents' success on his own. The issue is that he is unsure of how to start a business and how exactly to make it grow. Starting a business is hard as many have said 9/10 times, businesses go under. Therefore, Tanner is unsure and wishes to seek guidance. This is where Tribe + Purpose can come in and guide Tanner in his business venture. As previously mentioned, given the right price, there is a market for college students. Given that Camden is familiar with the college atmosphere, Camden will be able to cater "Know your Tribe" to guide the diverse groups of college students that join. With each success, it leads to a sales funnel where Know your Tribe can turn into Power Tribe and so forth. While not a primary target market at the beginning, the survey we conducted helped us pivot in realizing the untapped potential that college students offer. Both Sally and Tanner Williams represent the broad spectrum of students that often graduate from college.

Appendix C: SWOT Analysis

- Total Available Market (TAM): After defining the industry, provide some data on the total number of prospects in the industry or your more narrowly defined market. Is this a particular type of household or geographic location?
- Serviceable Available Market (SAM) From the TAM described above, begin to narrow this down by the actual prospective customers you can reach (service, market to, supply, etc.).
- Market Segments: What are the main segments or groupings that could be defined from the overall industry? How do you categorize them: geography, customer demographics, ethnicity, age, type of business, prospective business customer type, etc.?

Market Segments: Team Tribe and Purpose aggregated research results and created a customer profile as they relate to both primary and expanding target markets.

- Customer Profile

Mason Jones

Background

- Owner of an Accounting Consulting firm.
 - Opened business when he was 42 years old.
- Has 30 employees.
- Previously, served in the Air Force for 16 years.
- Went to college for 4 years.

Demographics

- Age 44
- Male
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- Married, 2 kids

Goals

- Savings
- Growing his business
- Instilling a productive environment

Challenges

- Has currently hit a plateau with business
- Trying to provide incentives and boosts for employees

Values

- Values Security and Time
- Values Leadership, strong work ethic, teamwork, and motivation



Hobbies:

- Hunting/Fishing
- Watching Sunday Night Game
- Golfing
- Going to Texas Steakhouse with friends and family

Obtaining New Customers

- Medium to High-Income / Urban-Rural Locations
- Small business owners.

- **Target Market:** Now, after identifying various market segments, define your target market, specifically. Why are you choosing this target? Why do you think you will have

success with this group? Why are you narrowing to only this group? Will you expand your Target Market in the future, why?

- **Primary Target Market:** Veteran Owned Small Business owners along the Front Range of Colorado. This market is being chosen because Otis has had a successful military career. Small businesses need good leadership to carry them through tough times, especially if the business is under 5 years. Tribe and Purpose will have success because the target market will have similar values and can easily relate to the challenges of transitioning from a military position into a civilian life.

Tanner Williams

Background

- Undergraduate student from college
 - Graduated with a Bachelor's in Business at the age of 22.
 - Took a gap year to travel and experience culture.
 - Son of corporate parents.

Demographics

- Age 24
- Male
- Urban City Area
- Single

Goals

- Start his own business
- Grow from the shadow of parents
-

Challenges

- Unsure of how to start a business
- Trying to be independent
- Unsure of where to go.
- Trying to solidify his purpose

Values

- Values money
- Values time and time management
- Values independence



Hobbies:

- Mountain Biking
- Lacrosse
- Golf
- Hockey

Obtaining New Customers

- High Income / Urban Locations
- Recent College Graduate

- **Expanding market:** College students that are completing their degree within two semesters or less left in their degree through college graduates that have graduated within the last years. Team Tribe and Purpose has chosen this group because it lends itself to the strength of one of the primary instructors for Tribe and Purpose, Camden McGregor. Camden has access to the target market through his position as a rugby coach. As a professional coach his experience lends itself to the success of his coaching ability both on and off the field.

Competition: In the target market of the Front Range there are several businesses that are in direct competition with Tribe and Purpose.

Competition: Businesses all compete in one way or another. It may be with specific, direct competitors or it may be with the way customers have been doing things for a long time. They solve their problem in a different way. When identifying the competition, you should identify who else is providing products or services to solve the same problem you are addressing? What are your business' advantages over these competitors? How will your voice be heard over the noise of competitors? Sometimes a business plan includes a matrix of features and compares how each business offers or doesn't offer those features. This section should reflect how your solution is different and better suited for the target market you have identified than the competition.

-
- **Direct Competitors:** Who are the main competitors you will go up against? How many practices are there in the area? How long have they been in the market? What are their advantages?

Direct Competitors: Mt. Carmel Veterans Center. This non-profit organization works with veterans. One aspect of the services they provide is for transitioning service members. that are starting a business. One office in the Colorado Springs area. Mt Carmel has been in the market for long enough to establish a brand and is well known in the Colorado Springs area. According to their website they have had 10,000 clients and have found employment for 3,000 veterans and their spouses. They have six employees in the Colorado Springs area who are dedicated to the transitioning office. The transitioning office offers several services including military career transition employment workshops, military spouse career program, veteran job coaching, and community partnership resources. The services offered are organized well and the services are clearly outlined on their website.

-
- **Status Quo:** Are you competing with the way people or businesses do things now? Do you have a new technology or process that will change their minds?

We are one executive coaching firm among many. It is a red ocean, and we are doing our best to differentiate ourselves through who we are and how we help people. Our goal is to get people to change the way they do business and live their lives, leading with purpose and living with intention.

-
- **Pricing:** How will your product or service be priced compared to the existing competition?
 - **Messaging:** How will your product or service be positioned over the existing competition or status quo?

It is about finding people that simply are like us but have something missing in their lives and business. Stagnated business, spending all their time working.

- **Uniqueness:** Tribe and Purpose use their leadership ability to teach techniques that can be applied to individuals and are primarily valuable in a group setting or tribe. The value of the tribe is that the tribe extends past the training seminars and extends into relationships that grows a person support network.
- Why will your product or service capture market share? Will you be growing into parts of the market the competition has not reached or will have to have a customer switch to your product or service? How will you do this? (E.g., do you have extended opening hours to reach a different market? Are you providing an extra service, or a one-stop shop for families?)

Strongest websites found have videos, of people who went through the program and how it affected their business. Coopetitor's websites are a lot more organized and less wordy. A lot of them have multiple offerings.

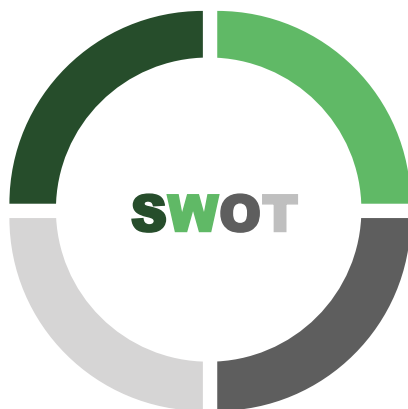
SWOT Analysis: You can include a SWOT analysis by completing the boxes below to assess your business in the current environment in terms of strengths and weaknesses (internal) and opportunities and threats (external). This is a good exercise to go through on an annual basis. After completing your analysis, provide your thoughts on: how your strengths can help you to maximize opportunities and minimize threats; how your weaknesses can slow your ability to capitalize on the opportunities; and how could your weaknesses expose you to threats?

STRENGTHS

- Multidimensional Instructors
- Leadership Expertise
- Niche Market
- Large Professional Network
- Social media use
-

OPPORTUNITIES

- Increase Market Share
- Expansion
- Collaborative Opportunity
- Community awareness through participation, events



WEAKNESSES

- Effectiveness of lead capture
- Separate Locations
- Scaling Attendance
-

THREATS

- Low barriers to entry
- Low brand awareness
- Poor reviews
- Social Media

-
- **Strengths:** What will be your company’s strengths when you launch? How do you see this changing in the future? What are your unique characteristics that make you stand out?
 - **Weaknesses:** If you were the competition, what would you say to prospective customers about where your company’s products or services are weak or deficient? What are the most important weaknesses to overcome first?

Getting the right message in front of the right people is one weakness.

- **Opportunities:** With product improvements or new partnerships, where could your business grow? What new segments could you enter in the future? (E.g.: Are you buying an existing practice? Do you have a growing market?)
- **Threats:** What external factors could put pressure on your business growth or cash flow? Which of these threats can you control? Which ones can't you control? (E.g.: Are there any new health policies or regulations surfacing that may impact your business? Increased competition?)

Coaching and Consulting:

Tailored Plan: Instead of 6 months, go for 1 month plan options for smaller scaled businesses

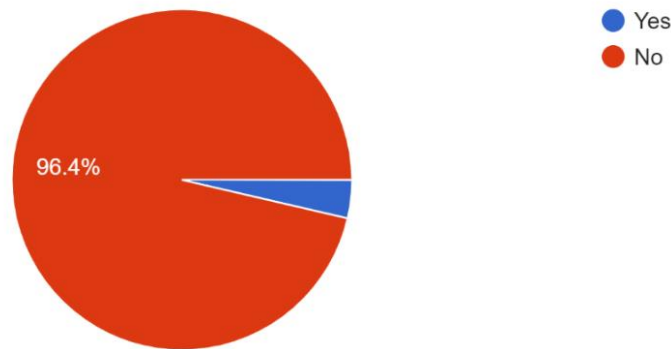
- Pain Points
 - I don't have time to do what I want
 - Mass resignation
 - Can't hire quality people
 - Feeling lost
 - Why isn't my business fun anymore?
 - I feel like we are stuck where we are
 - Finding and keeping qualified employees
 - Work on the business vice in it
 - Hiring quality people
 - Working in the business = business owner with a job
 - Working on the business = entrepreneur. 10 employees < 20 hours in the business; 50 or more < 10 hours in the business

Appendix D: College Survey

In the graphics below, we conducted a survey catered to college students to determine a target market for university entrepreneurs. Questions ranged from asking students if they would participate in career coaching, the price they would be willing to pay for career coaching, and what would be the most persuasive way to contact students on receiving career coaching. Below are the results of the conducted survey:

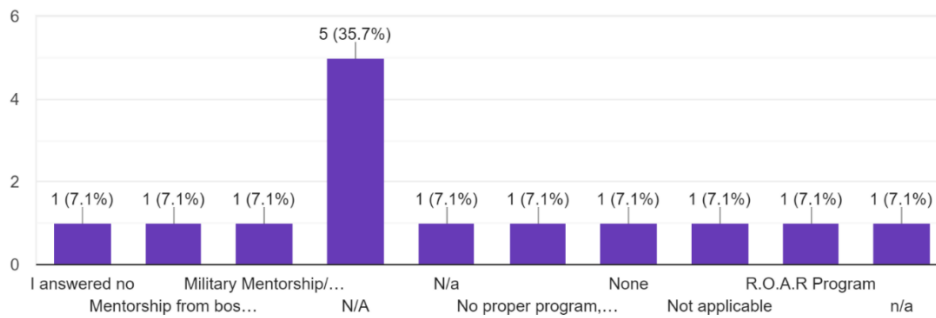
1. Do you currently participate in career coaching?

110 responses



In a survey of 110 college students, 106 said they do not currently participate in career coaching while 4 stated that they are currently involved. 110 responses surpassed our expectations of 50 students and provided a solid sample size for determining a target market for Tribe and Purpose.

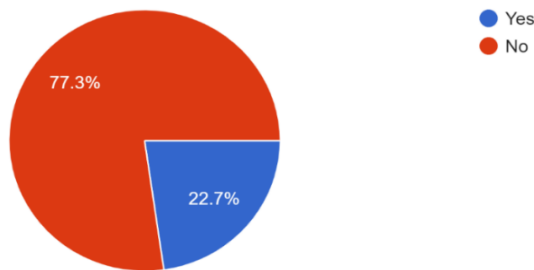
2. If you answered "yes" above, please specify what program you are participating in? On/Off campus
 14 responses



21

From the data above, we can see that 13 students are currently involved in different career coaching programs. These ranged from boss mentorships, military mentorships, other unlisted coaching services, and R.O.A.R.

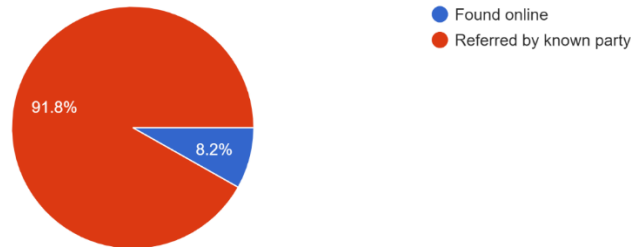
3. If you answered no above, would you pay \$50 a month for career coaching that will help you with time management and budgeting while also helping you to find clarity in your purpose?
 110 responses



Above, we found that a majority of students would not pay for this service but there is a market for Know Your Tribe because 22.7% of the students from our sample would. This shows that there is potential for Know Your Tribe.

4. Would you prefer to work with a business coach that you found online or have one referred to you by a known party?

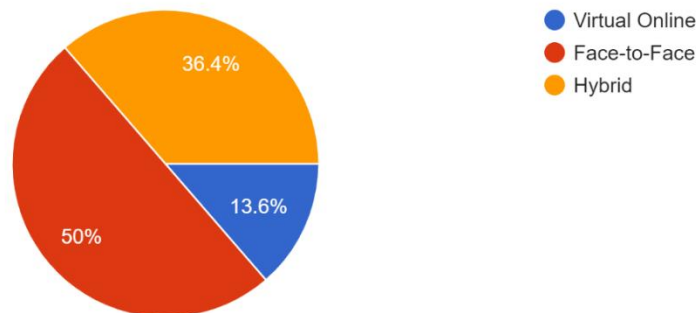
110 responses



One question we have had throughout the semester was whether or not referrals were more efficient than online marketing. From the survey conducted, it is revealed that 101 people would prefer having a referral from a known party rather than an online advertisement.

5. Would you prefer to attend business coaching online or face to face?

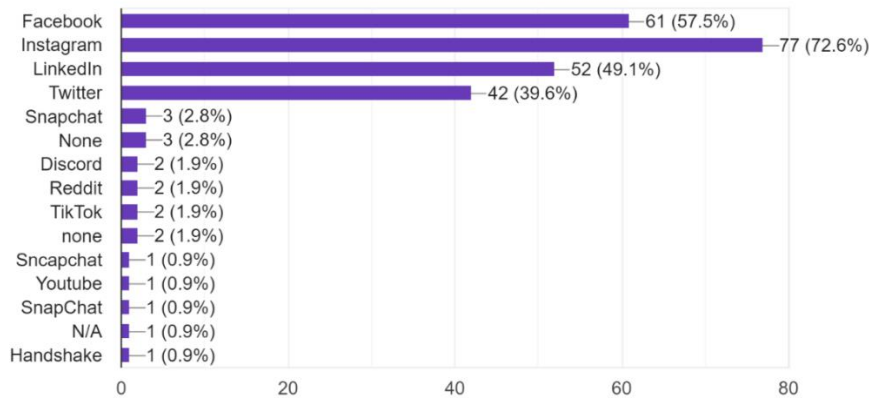
110 responses



From the survey, 55 people would rather have an in-person experience when it comes to coaching. Additionally, 40 people said they would recommend hybrid while only 15 stated that they would prefer online. From these results, we can see that personable experiences are what the majority of students are looking for which plays into our client's strong suits. This only furthers the notion that the pursuit of Know Your Tribe would be recommended.

6. Which social media platforms are you on?

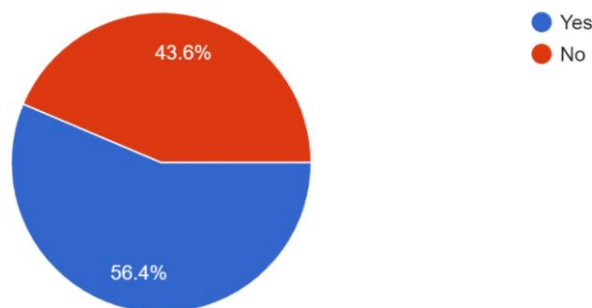
106 responses



From the survey results, when it comes to social media platforms used by college students, it was revealed that students use Facebook, Instagram, LinkedIn and Twitter the most in regards to other platforms. Currently, Facebook and Instagram are utilized the most by Tribe + Purpose. Given that LinkedIn, and Twitter pose as possible alternate routes when it comes to advertising and spreading Tribe + Purpose’s reach.

7. Do you know what you will do once you graduate?

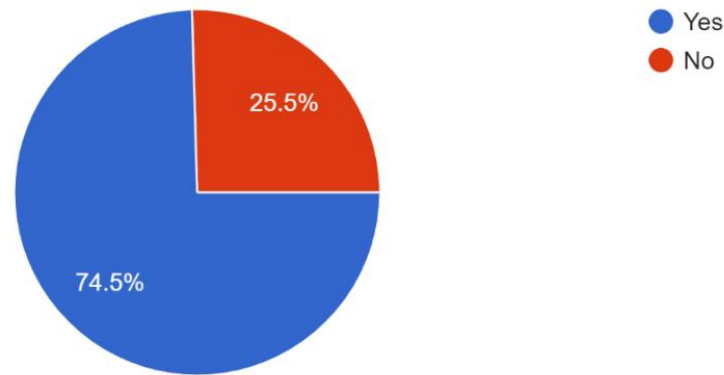
110 responses



This shows that there is a lot of uncertainty for plans after gradation for a large portion of our sample. This is where coaching may help the students in continuing in their careers and life.

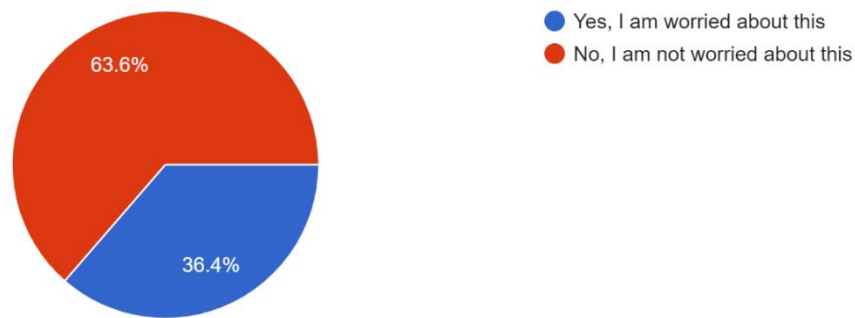
8. Will you find your true purpose within your profession?

110 responses



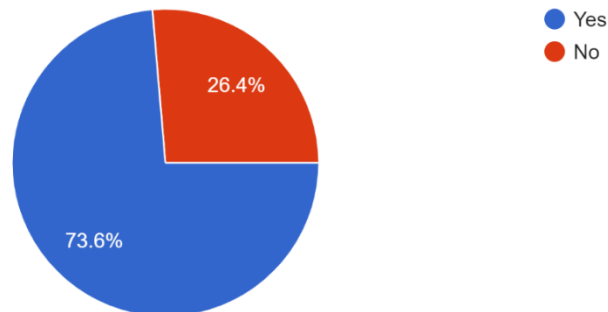
From the results of this question, 82 students stated that they are certain that they will find true purpose from their majors while 28 students have stated that they don't think they will find their purpose. This only furthers the notion that coaching for students may be a good untapped market for Tribe + Purpose. College is a place where students learn more about themselves and guidance may prove beneficial to said students. Some students may decide to change their majors or go about a different route in life and Tribe + Purpose has the potential to guide these students with their program, Know your Tribe.

9. Are you worried that you will not be able to apply what you learned in college into your career?
110 responses



From the question above, 70 students are not worried about their education applying to their careers while 40 students are worried about the implications of their education not translating to their workplace. This continues the theme of a disconnection as students carry on in their studies where coaching may be needed to help provide a linear path moving forward to ease any doubts or worries.

10. Could you benefit from guided problem and solution identification within a group of your peers?
110 responses



Question 10 provided an excellent look at just how much the potential of a market is for Know your Tribe. 81 students stated that they would benefit from guided problem and solution identification within a group setting like Tribe + Purpose offers.

11. If you are interested in receiving more information about Tribe + Purpose please provide your email. Below are the email addresses the team has received of individuals who are prospect clients for Know Your Tribe:

lsingh@uccs.edu

chasewilliamculver@gmail.com

cbobo@uccs.edu

emontgo4@uccs.edu

dantecannestra@gmail.com

hayden.olmstead@gmail.com

kwiksilver323@gmail.com

lfri9@icloud.com

cesparza@uccs.edu

vford@uccs.edu

man2machinem2m@gmail.com

tcorner@uccs.edu

ibledsoe@uccs.edu

apomales@uccs.edu

dtran@uccs.edu

msowells@uccs.edu

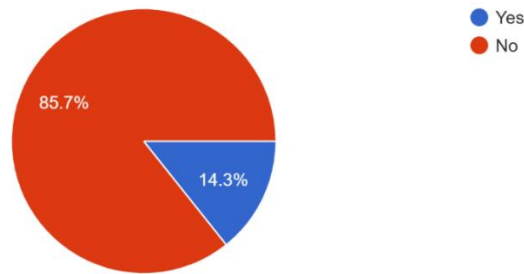
orioamerica@gmail.com

Bpeska@uccs.edu

Appendix E: Business Survey

1. Do you currently participate in career coaching?

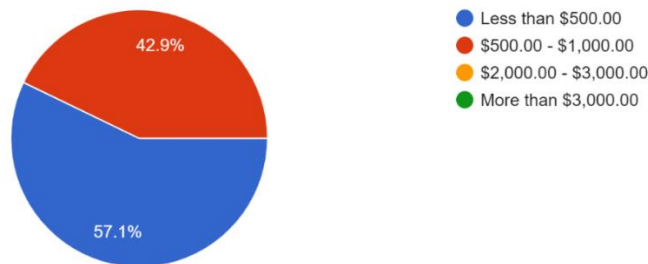
7 responses



On question 1 for the business survey, 6 business owners stated they do not participate in career coaching while 3 do.

3. If you answered no above, what would be your monthly budget for career coaching?

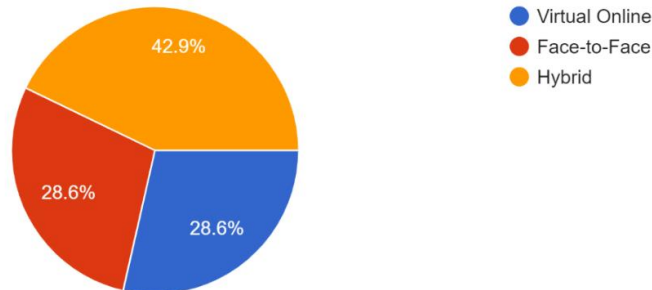
7 responses



4 business owners stated that they would pay between 500 to 1000 dollars while 3 stated they could only do below 500. This shows that some small business owners may be on too strict of a budget to afford \$2,000 per month without being presented guaranteed returns on investment. There could be a larger market to target if pricing was reduced to \$1,000 per month.

4. Would you prefer to attend career coaching online or face to face?

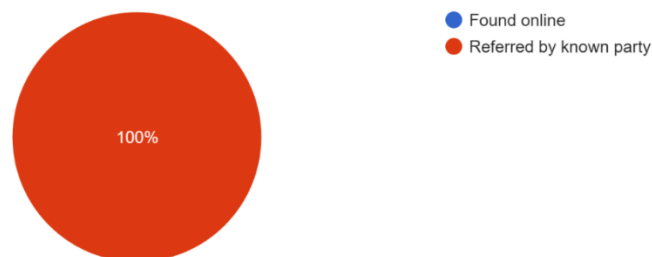
7 responses



In the post-covid era, 2 business owners said they would prefer virtual engagement, 2 stated they would prefer face to face and three stated they would prefer hybrid. Unlike the college students, the business owners have a more even distribution in what would work best for them. This may be due to COVID policies mixed in with their busy schedules.

5. Would you prefer to work with a career coach that you found online or have one referred to you by a known party?

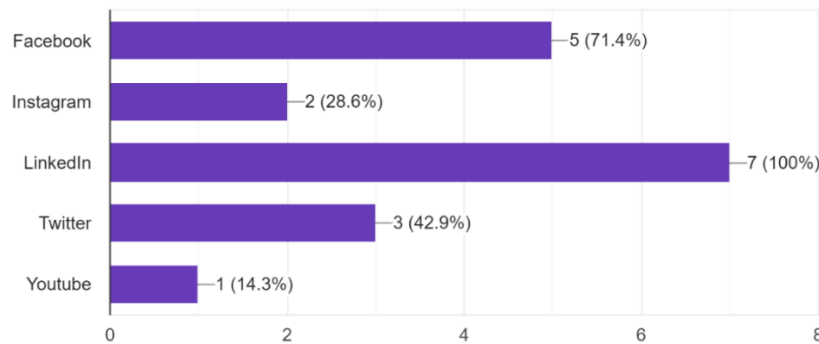
7 responses



Another point of discussion that was debated over the semester was the question of using referrals as a means of marketing. With a whopping 7/7 business owners stating they would prefer a known party to refer them, this continues to further solidify that marketing should involve previous clients spreading the word for Tribe + Purpose. In both college students and business owners, both preferred the referral by a known party rather than online marketing.

6. Which social media platforms are you on?

7 responses

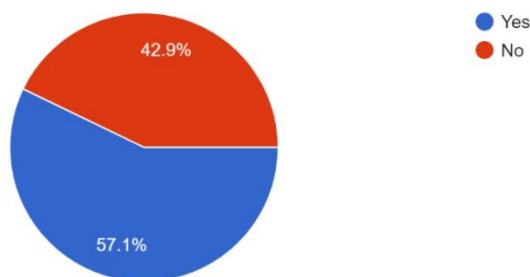


Regarding

social media platforms, there is promise. Currently, Tribe + Purpose utilizes Facebook, Instagram and LinkedIn with emphasis on Facebook and Instagram. While Facebook remains noticeable, Instagram is not as utilized as one would have thought. Rather LinkedIn ranks at the top with all business owners polled using it. Tribe + Purpose has a LinkedIn with many connections so with the right campaigns, they can capitalize and network with many business owners.

7. Has the "passion" for your business started to diminish?

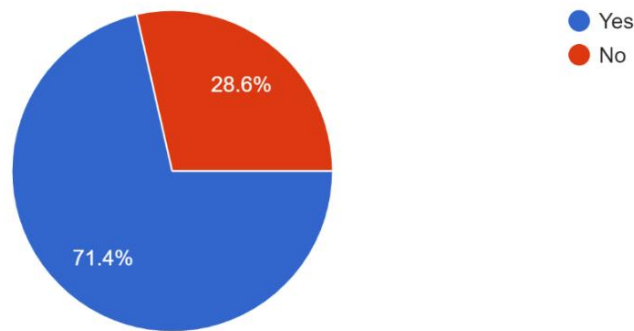
7 responses



Regarding passion for business, 4 owners stated that their passion for their business has started to diminish while 3 stated it hasn't. This question is one catered for Tribe + Purpose to gauge which businesses would best work for them. From this question alone, several businesses could benefit from Tribe + Purpose's services.

8. Is it difficult to keep qualified employees?

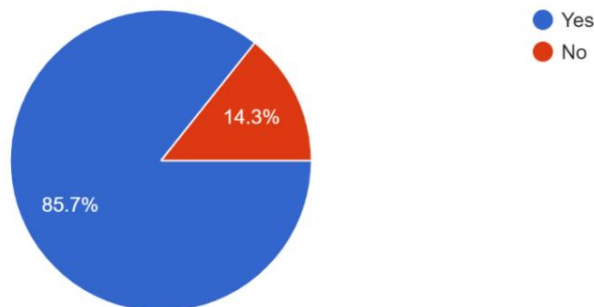
7 responses



5 business owners admitted that it is hard keeping qualified employees while 2 can keep qualified employees. Once again, one of the pain points that Tribe + Purpose talk about is present within the businesses we surveyed, further showing that if they were to fix their price range, they have the potential to swoop in and gain more clients.

9. Has growing your business been a challenge?

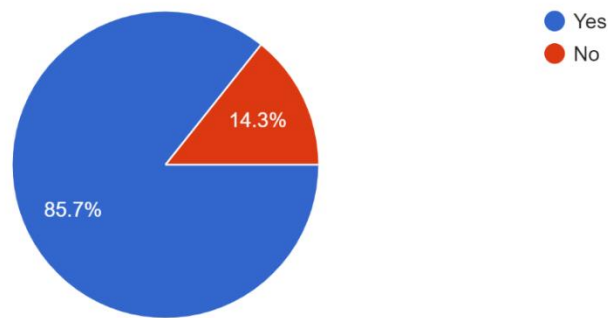
7 responses



From the survey question above, 6 business owners stated that growing their business has been a challenge while 1 stated that it has not. Once again, the businesses we surveyed have conveyed pain points that Tribe + Purpose talk about and aim to fix. With the right path and pricing, Tribe + Purpose will be able to hit businesses that have plateaued in their journey of expanding and broadening their horizons.

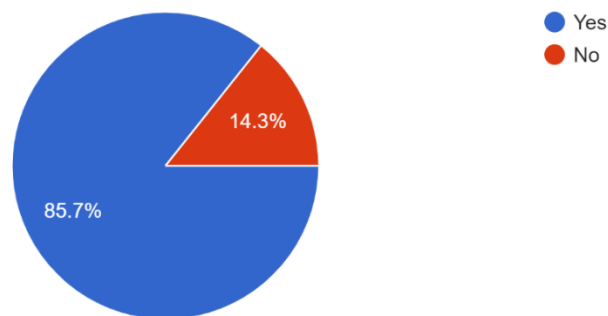
10. Are you interested in finding solutions for issues your business may be facing?

7 responses



11. Could you benefit from guided problem and solution identification within a group of your peers?

7 responses



In questions 10 and 11, there is a trend in that 6 business owners have admitted that they wish to find issues within their business and wouldn't mind doing guided problem identification within a group. Tribe + Purpose has many potential clients that would benefit from their services but as previously seen on the survey, the price point of Power Tribe is too high for some of these business owners. With the right price point, Tribe + Purpose could capture up to 6 potential clients that could greatly benefit from their services and given the impact of the coaching, could go on to become recurring lifelong customers whose referral could bring in more clients.

12. Provide your email address if you answered yes to any of the questions above and would like to receive more information about Tribe + Purpose

Below are the email addresses the team has received of individuals who are prospective clients for Know Your Tribe

Cregg@ATeamAgents.com

jonk@ihhp.org

laura@fpcpackaging.com

slahart@itsupplies.com

Appendix F: Networking Opportunities

The team believes that attending local networking events is crucial for Tribe + Purpose to generate more clients. Below are some events in Colorado Springs and Tucson that we have identified that offer very welcoming environments to entrepreneurs or anyone interested in networking with other professionals. We have included brief descriptions from each networking group to give you an idea of what they are about and who is attending these events. Certain groups have no upcoming events posted but we recommend creating an account and joining the groups on meetup.com

On top of attending networking events the team believes there is an opportunity to generate more leads through volunteer work. The team encourages you to volunteer for organizations that support something you are passionate about. By doing this, it will present an opportunity to meet like-minded people who could be potential prospects for Tribe + Purpose. The goal of Tribe + Purpose is to create better communities and a better world and there is no better way to demonstrate this than by giving back to your local community. By volunteering it will help you to demonstrate to potential clients that you are truly driven by your purpose and that they can be as well.

Networking Events in Colorado Springs

PC Power Connectors

- “Our purpose is to create a welcoming environment in the Colorado Springs area that encourages productive practice of networking. These events are open to everyone.”
- Events on the 4th Tuesday of every month at 5:45 at the Public House at The Alexander

- They would like everyone to RSVP for events which can be done by searching for the PC Power Connectors on meetup.com

Colorado Entrepreneurs Network

- “Welcome to Colorado Entrepreneurs Network
The Colorado Entrepreneurs Network's goal is to help you generate more clients, retain current clients and create an endless stream of referrals.”
- As of now there are no upcoming events, but this could be an excellent group to join for the future.

Money Magnet Networking

- “CALLING ALL BUSINESS OWNERS, ENTREPRENEURS, SMALL BUSINESS, ANYONE LOOKING TO CONNECT WITH THE COMMUNITY! We are here to bring the community together! Anyone is Welcome! We are a fun group that is recognized for connecting the community. We have been hosting Networking meeting for years now all over Colorado! Come join the MONEY MAGNETS and Build Real Relationships with Great People!”
- As of now there are no upcoming events, but this could be an excellent group to join for the future.

Community and Cocktails Business Networking

- “The mission of our group is to empower entrepreneurs by building solid strategic relationships leading to more clients and business. This is not like your other networking groups. We have a strong focus on education which we will be bringing through our

powerhouse speakers bureau, building strategic partnerships to help you build business through collaboration and community.”

- This could be a fantastic opportunity as they focus on education through speakers. The team thinks it would be worth attending with the hopes of getting to speak to a large crowd of entrepreneurs who attend these events.
- As of now there are no upcoming events, but this could be an excellent group to join for the future.

Networking Events in Tucson

The 101 Referral Network Zoom Meeting

- Grow your business at our weekly zoom networking meeting this Tuesday at 6:30pm where Members and Guests will enjoy:
 - Introductions
 - Breakout rooms
 - Learning ideas from other like-minded Owners
 - Exchanging contact information
 - Learning about the 101 Referral Network and upcoming events
 - Facebook tips
 - New connections every week
- This event occurs every Tuesday at 7:30 PM MDT and could be an easy way of obtaining leads. The zoom link can be located on meetup.com and as of now there are still open spots for their event on May 3rd

Startup Drinks

- ‘A free networking event hosted once a month by Startup Tucson. Come make connections with entrepreneurs and mentors in the community!’
- This event is on May 5th from 5:00 PM – 7:30 PM MST, more details can be found at [eventbrite.com](https://www.eventbrite.com) as well as a link to register

Appendix G: Marketing Ideas

Tribe and purpose use multiple marketing platforms to reach their target audience. This includes Instagram, Linked In, and Facebook. Additionally, they have a consistent newsletter that is sent out every Monday morning. Tribe and Purpose use a marketing strategy that focuses on education with the intention of guiding their audience through a traditional sales funnel. This is done by directing their customers to landing pages that capture customers email addresses.

Customer Testimonials

We can use customer testimonials (found on LinkedIn, through direct contacting) to build the reputation of Tribe + Purpose. These testimonials can be placed in Instagram Ads, Facebook Ads, in Instagram Posts, in LinkedIn Posts, and more.

Conferences / Seminars

Otis and Camden can market their business at business conferences and seminars to help further expose their brand to corporations and small businesses. Many businesses and individuals go to seminars and conferences specifically to learn more about how to do business better. This is a fantastic way to market for this business type. *To market themselves at conferences and seminars, they can use customer testimonials to help build their credibility within the community. Cam + Otis can also display in a tangible form how they have increased the success of their clients.*

Instagram / Facebook Posts

T + P can market their customer testimonials and what they do on Instagram posts that post on Instagram and Facebook. These posts should be ones where the viewer can interact with the company, Cam, and Otis. *Using customer testimonials in quotes and then marketing how their business has impacted those organizations in a positive way is an effective way to get started.*

Instagram / Facebook / LinkedIn Live

Cam + Otis should do live podcasts / interviews / sessions through Instagram, Facebook, or LinkedIn. These platforms help the organization to interact with the users in hopes of building a reputation, reaching more people, and growing the business. *Recruiting previous clients onto the podcast to give testimonials about their positive experience with Tribe + Purpose. In addition to the customer testimonials on the podcasts, Cam + Otis can interview the people and invite them as guests to talk about unique topics not necessarily related to leadership development.*

Tribe Advantage Retreat

There is a “Tribe Advantage Retreat” happening in August. The details of this are unknown, but this can be marketed in a variety of diverse ways to reach more people and help others to know about this event. This retreat is a fantastic way for individuals and businesses to get to know Cam + Otis.

TikTok

We see a multitude of professionals using TikTok for free to market their businesses. This is a viable option for T + P if they are looking to reach a younger population. Through TikTok, Cam + Otis can give advice, make fun or engaging videos, and through this can market their business to attract customers and build their “brand” name. *In addition to talking about a variety of different things, Cam and Otis can include customer testimonials and invite clients to be involved in these videos.*

For Deliverables: Marketing storyboard/script/prompt

For each of these things, outlines should be created to give Otis + Cam an idea of what these things could look like. Obviously, we can only do so much.

Marketing Storyboard

TRIBE + PURPOSE IMPROVED MARKETING



Attracting the Client, Anna

Anna is a small business owner for creating resumes for veterans and is looking to find guidance in expanding her business. Anna comes across the improved fishing advantage Tribe + Purpose ad on Facebook.



Areas of Improvement.

Anna finds the fishing advantage workbook by following the Facebook link. She begins to fill out the workbook to determine strengths and opportunities for her small business.

Benefits of Webinar

- Builds Trust
- Reveals Pain Points
- Gives Instructors time to follow up
- Produces leads for Know your Tribe

Anna is guided to a workshop, or to speak with Otis.

After completing the fishing advantage workbook, Anna signs up for a workshop and wants to speak one on one with Tribe + Purpose for customized advice and guidance.



Securing Anna's Business.

Anna meets with Otis with her fishing advantage workbook with reflections. Otis provides Anna feedback and begins mapping out business plans based on her current business needs, and wants.

Appendix H: Website Improvements

Web Results

Home • Tribe and Purpose for success ?

<https://www.tribe-purpose.com>

Tribes serve a different purpose now. As a member of a tribe, you are part of a group of people w you to succeed. They are excited about your purpose and ...

One concern for the picture above is that it has not been tested. Many users nowadays utilize some sort of web security software so the fact that the website has a question mark may put off some people as most people would usually see a green checkmark.

We breed success

It's what we thrive on. We will guide your discovery of what your unique success is. You'll learn how to create successes to move you towards your purpose.

Even on your worst day, you can find success if you choose to look for it, celebrate it and build on it.

Leadership begins within you. No one can be a leader unless they believe they can do it. All leaders are servants to their tribe. We guide you to understand this and to discover your ability to lead.

Great leaders are great followers. That's why no one can make it on their own. You have to have others around you that support you and that you follow. After believing in yourself, the next step is to be a great follower. As a member of Tribe and Purpose, you are a member of a tribe that requires effort, participation, and support. There are no passive tribe members.



Here is an example of utilizing pictures to bridge the white space. The text talks about being a tribe so perhaps a picture with team members hugging to show that one is not alone will help users be more engaged with the website.

Another idea would be to center the text so it utilizes more of the blank canvas of the website and would also make it easier for the user to read as the text will be throughout the page rather than just a portion of it. Overall, I think better formatting with the margins to make more of the space will be beneficial.

“ ASAE is constantly providing learning opportunities for me via newsletters, articles, and webinars, as well as providing a platform to network with others in similar roles.

Danelkis Serra
Chapter and Membership Engagement Manager
International Institute of Business Analysis

“ I took the CAE and am excited to connect and network with other CAEs. Nice resources and materials are available, and ASAE staff are responsive.

Dana Ritchie
NFP and Constituent Services Senior Director
American Health Care Association

This is from an organization known as [Testimonials \(asaecenter.org\)](https://www.asaecenter.org/testimonials) and these are testimonials they have on their about page. This allows visitors to your site to see the results of the hard work you guys invest into each member. This allows your customers to do your marketing for you by providing a good rep for you.

About ASAE



ASAE is the essential organization for association management, representing both organizations and individual association professionals. We believe associations have the power to transform society for the better. Our passion is to help association professionals achieve previously unimaginable levels of performance. We do this by nurturing a community of smart, creative, and interesting people: our members. In short, we are the Center for Association Leadership.

They also utilize pictures to reduce most of the white space on their page both informing and engaging the reader.

Final Website Suggestion- enhanced video

Video Script

Intro:

Footage of one on one in person meeting/Tribe Trip

Voice-Over of participants explaining what they enjoyed/learned (ie. “really helped me to identify/discover what I was missing/needed to do/purpose”, “collaborative environment”, “Unique perspective/ideas on how to find purpose + improve business and leadership skills”)

Otis Speaking:

Pitch Tribe and purpose

- What it's about?
- What they do?
- What lead them to start the company?
- Qualifications/Experiences

Add optional footage if desired

(optional) Cam Speaking

- His experiences/qualifications
- What inspired him to join in the business
- Benefits he sees from Tribe + Purpose

Success Story:

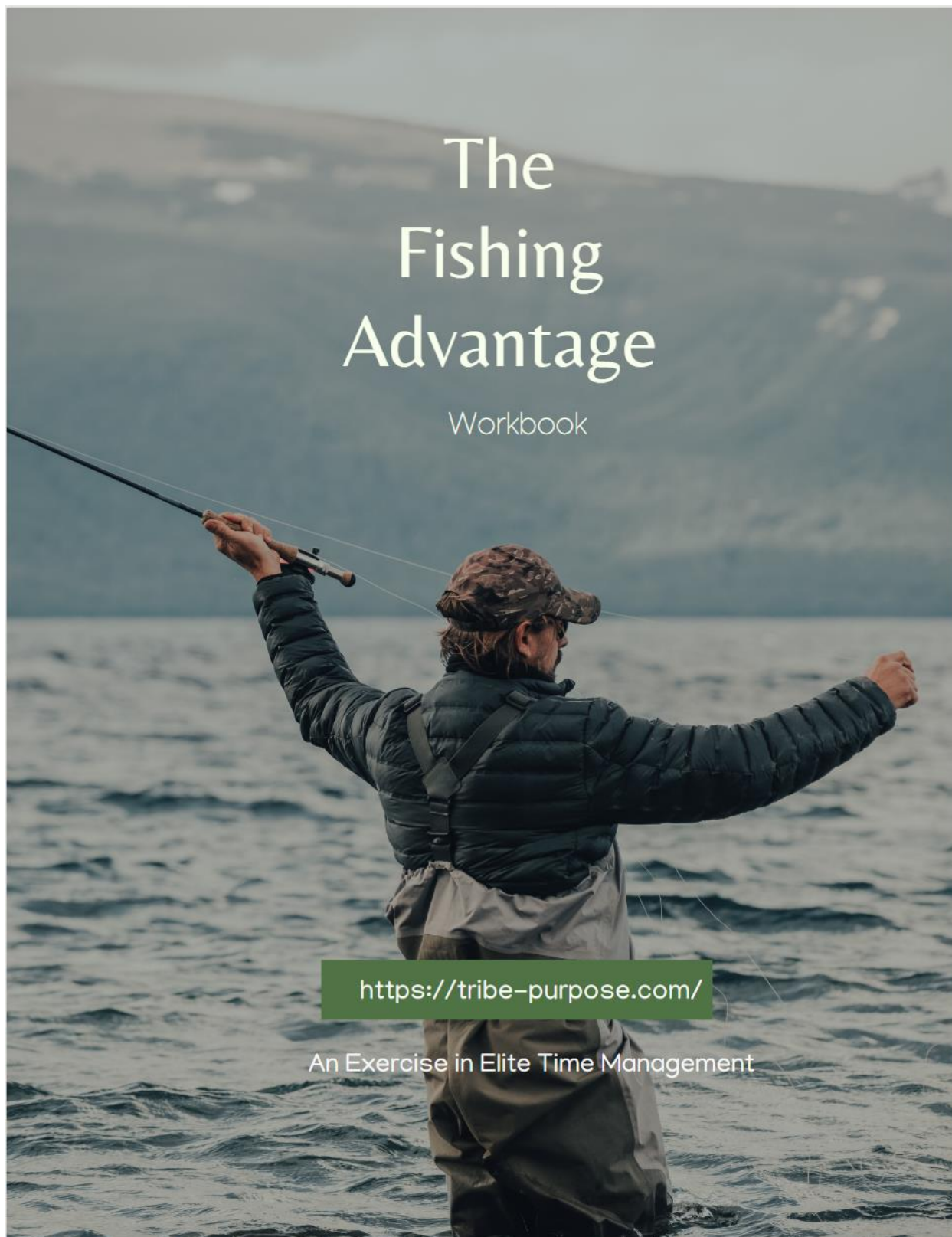
- Previous/current participant in tribe or know your tribe
- What led them to tribe + purpose (optional)
- What their pain point/problem was

- How Tribe and purpose helped them
- What they learned + gained from the experiences
- Key experiences/lessons
- (if applicable) success story of how they improved thanks to tribe and purpose
 - Measurable results (ie. profits, productivity, growth, etc.)
- Recommend other people to try it to improve business + find their purpose

Similar format for Know your tribe if want to make a specific ad video for it.

- Different success story (ideally founding own business or improving it for college student)
- Show one-on-one sessions for footage rather than event footage

Appendix I: Fishing Advantage Workbook



The Fishing Advantage

Workbook

<https://tribe-purpose.com/>

An Exercise in Elite Time Management

About this workbook

At Tribe and Purpose our mission is guide you to find your clarity, resolve, and purpose. We know the challenges, and we are with you the entire way, providing a plan, coaching, and accountability. We know that no one gets there alone. That is why we also help you build your tribe because your tribe and purpose lead to success in life.

This workbook serves as a step by step guide to practicing and implementing elite time management techniques that will get you back to doing what you love!

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Tribal Chiefs

LTC, Special Forces, US Army, Retired Otis McGregor leads Tribe and Purpose with his son Camden as the principal leadership and success coach. With over 40 years of experience as a leader, coach, and team member, Otis embodies the values and principles of Tribes and Purposes. Otis is driven both by these values and the idea that better leaders and tribes create better organizations, building better communities leading to a better world. Through the decades, Otis has empowered hundreds of businesses and individuals to find their clarity for purpose and their tribes for connection. Otis leverages the unique blend of heart, passion, and experience as one of the elite commanders of Green Berets. Trusted with some of the highest missions of our great nation, Otis knows how to think from both the 10,000-foot view as well as amid battle to ensure he and his tribe not only achieve the mission but do it in the most risk-mitigating ways possible. Brought to the civilian world after retirement, Otis walks the walk and talks the talk. Spend five minutes with him, and he will inspire your heart and mind.



Leadership and Success Coach Camden's passion is to help people succeed. He fulfills this passion as a Leadership and Success Coach with Tribe and Purpose. Camden has years of coaching experience in rugby where he has worked extensively with high performing teams as well as skill development teams. Leading these teams during intense situations has taught Camden to remain calm and provide the certainty and consistency that teams need to perform at a high level. Camden applies this background of teamwork and leadership to the business world in order to help teams become collaborative and perform at higher levels. With several entrepreneurial ventures under his belt, Camden understands the struggles that entrepreneurs face and the psychological situations that unfold internally during these struggles. Between coaching rugby, studying agricultural business, and having a passion for behavioral economics Camden is adept at combining different schools of thought. He believes that the best answers can only be found by learning different perspectives. His diverse experience helps him to find creative solutions, helping clients to create lasting change for themselves and their companies. Camden and his fiancée, Jessica, live in Tucson, Arizona with their two dogs Looggie and Gumbo.



Legend of the Fishing Advantage

When I was growing up in Central Pennsylvania my friends and I dreamed of the first day of trout season in the spring. Fishing was by far my favorite activity and it did not matter if I was fishing from the bank, boat, or dock if there was water my line was in it. Reflecting back I felt rejuvenated and full of life.

Into adulthood I joined the Army working as a medic and vowed to stay true to the things in life that I am passionate for like fishing. As I gained rank and matured as a leader the core value of selfless service weaved itself into the fabric of my ideologies and how I saw the world. My sense of purpose was putting the needs of my family, friends and career above my own. Rarely, if ever, did I schedule stress free time for activities that I enjoyed.

One day while I was rummaging through the garage feeling overwhelmed and frustrated by some seemingly insignificant task I looked up and saw my old fishing gear from High School. Immediately my mind flashed back to the carefree summer days of my youth and in that moment I realized that I had forgotten my vow to carve out time for what I love. That experience led Tribe and Purpose to develop The Fishing Advantage, 5 time management steps that will have you back to doing what you love.

What is your Fishing? Why?

Discovering your why is the catalyst that sets off a chemical reaction and fuses your passions with your goals. As I looked at that dusty old bag of fishing gear in the garage all those years ago. I heard the voice of SFC Thomas welcoming me to my first duty station. "Work hard for your men and they will lay down their lives for you. Demonstrate your respect by taking care of yourself because a stressed medic is an ineffective medic and that can cause more harm to a unit than the enemy." As that thought passed I started to reflect on my role as a husband, father, student, and business owner. And I asked the question, Do I owe it to the people I serve in those roles to be at the absolute best of my ability? And can I reach that ability more consistently by carving out more time doing what I love? The answer to both of these questions is a resounding YES!

WHAT DO YOU DO TO RELAX?

In the box below. Write a brief description of what what you do to unwind.

Focus on Feeling words. Next, Ask Why you love this activity so much. Pull from values.

I would feel _____ while doing what I love which is _____.

The reason why is because _____.

_____ I look forward to this and will work hard to make time for it.

Formulate a Plan



Learning to plan well is a critical skill to being successful in both life and business but it takes practice. Just like learning to cast your fishing rod it can take a few tries. Why not use your hobbies as an opportunity to sharpen this valuable skill. One of the best techniques to use when planning is backward planning. Envision the goal and work backwards with the tasks that need to be completed in order to accomplish that goal. When planning just like in business you want to put the day your going fishing on your calendar and manage expectations from family and clients letting them know you have an obligation to yourself on that day.

MAKE A LIST PEOPLE YOU NEED TELL YOU ARE TAKING TIME

A big part of making time for anything is managing expectations of family, friends, clients.

-
-
-
-
-
-

Visualizing Outcomes binds our imagination with senses. Take 2 minutes to visualize the outcome through the five senses then write a quick sentence describing each of the five senses example below

EXAMPLE: THE SOUND OF THE WATER WAS CALMING

How did the scenery look?

Are there any pleasant sounds?

Can you smell anything refreshing?

How does catching your fish feel in your hands?

What does your drink taste like as you tell the story of your legendary catch?

BACKWARD PLANNING

Envision the goal and work backwards with the tasks that need to be completed in order to accomplish that goal.

TASK DESCRIPTION

What is the Task?

Why is it important?

How do I take action?

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BACKWARD PLANNING CONTINUED

Some people might be able to fit all their task on one page. Others might need an extra one.

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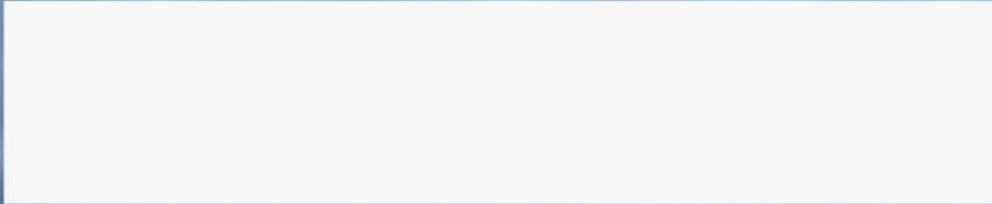


READ THE WATER

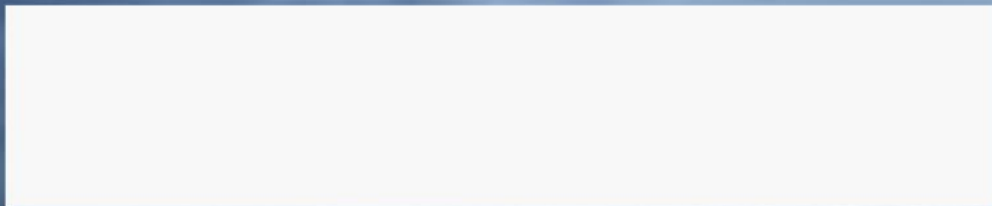
Exceptional fishermen possess the skill set to read the water. This means considering the depth, speed, clarity, and flow of the water. This ability gives the fishermen the know-how to adjust tactics. Making time for purposeful hobbies means reading the water in our lives. As time for our hobbies approaches we need to assess and predict events that will interfere with the time we set aside for ourselves. This skill will help us protect the time in our schedule and lead to more productivity throughout the week.

IDENTIFY UPCOMING EVENTS THAT COULD INTERFERE WITH YOUR PLAN

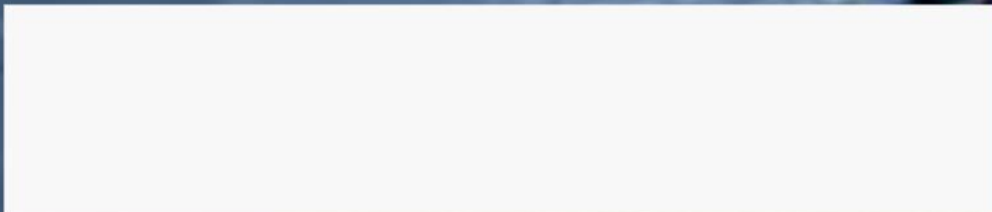
Foreshadow interruptions, Events in your schedule that would postpone your hobby.



Overcoming these challenges requires motivation. This is when we relate back to our why and identify the 2nd order benefits



Diving deep is the only way we can achieve purpose. Lets take this exercise one step further and Identify 3rd order benefits



NOTES:

Pro Tip: Join Know Your Tribe. Foreshadowing and identifying challenges can be blind spots. Positive influences can help identify those blind spots

Partner with a Guide



As I started to practice these steps I found myself out on the waters of Colorado fishing more often. My tackle box was full of beautiful hand tied flies that were given to me when I was in high school. No matter the conditions I couldn't find a fly that would produce. Unfortunately, in Colorado every adventure I went on my tackle was producing nothing, not even a glance. After the first attempt, my ignorance told me these fish were just too dumb to know what a tasty snack looked like. After the tenth time I realized I needed to ask somebody who makes a living teaching people to catch fish. I walked into a local fly shop and caught a guide as he was preparing for a group tour he was leading later in the day. I told him my story and he asked to see the flies. When I opened my tackle box he said wow! These are beautiful, did you tie them? I said no, they were given to me and they worked great in Pennsylvania. He chuckled and said, "It's warmer in Pennsylvania, more humidity so the bugs are bigger." The guide proceeded to pop open his tackle box and give me an exact replica of a hopper that I had only a few sizes smaller. My luck on the water changed that day. This is the same in leadership. If something in your tackle box is not working make an appointment with Tribe and Purpose. We can help!

TRIBE AND PURPOSE | THE FISHING ADVANTAGE

LIST A FEW AREAS IN WHICH YOUR BUSINESS COULD USE A GUIDE

Leaders are learners and the best way we can learn is with a coach. We asked a few questions to get you started and some black space for your own pain points

CHALLENGES

Finding personal time is difficult	Yes	No
My attention is pulled away and I feel lost	Yes	No
Feelings of being stuck and stagnated	Yes	No
Passion for business has stalled	Yes	No
Talent acquisition is challenging	Yes	No
Retaining Top Talent is challenging	Yes	No

Get your Line in the Water



The four steps above only take us so far in achieving our goals. If we are going to have success on the water catching fish the fundamental fact is that we have to get our line in the water. That means you have to propel yourself into taking action. Make it happen! You have a sense of your why, a plan, you have managed your schedule, and you got a guide. Now get out there!

If taking action is a challenge you need to overcome. Attend our small group mastermind, "Know Your Tribe". A group of 8-12 people led by one of our Chief Instructors. Classes fill up fast so schedule today!

TRIBE AND PURPOSE | THE FISHING ADVANTAGE

ACCOUNTABILITY

Tribe and Purpose believes in accountability. One way we ensure people take action is through follow up and positive encouragement

LIST GOALS FOR THIS PROJECT AND WHEN WE CAN FOLLOW UP WITH YOU.

Goal

Strategies

Goal

Strategies

Goal

Strategies

When to follow up

List Time Day and preferred method of contact in box above

TAKE THE NEXT STEP

Do you ever wish that you had someone who has your back? To help you find the answers, someone who enables you to perform at the level you want, or someone to ensure that you are on track to reach your goals? Then you have come to the right place.

We are all looking for success and purpose, and a sense of belonging to something. For hundreds of thousands of years, tribalism is how we have survived, and it is alive today. We thrive when we are part of something bigger than ourselves. Being part of a tribe is an essential element to fulfilling our purposes and finding success. We help you find and build your tribe.

Are you ready to live and thrive as your optimal self? Then we welcome you to your new Tribe and Purpose.

**JOIN KNOW YOUR
TRIBE TODAY**

Appendix J: Fishing Advantage Marketing Proposal

BI MARKETING PROPOSAL

FISHING ADVANTAGE

GET
BACK
TO
WHAT
YOU
LOVE



LEGEND OF THE FISHING ADVANTAGE

INTRODUCTION

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THE 5 STEPS

1. Discover Why

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2. Formulate a Plan

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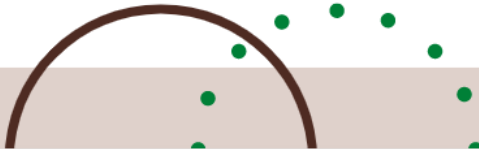


ACTION CHECKLIST

IDENTIFY YOU ACTIVITY

DISCOVER WHY

BACKWARD PLAN



OUR TEAM MATE

THE 5 STEPS



3. Read the Water

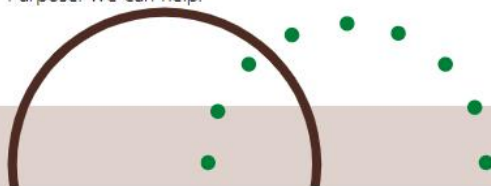
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4. Partner with a Guide

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ACTION CHECKLIST

- ASSESS THE SITUATION FREQUENTLY
- IDENTIFY OBSTACLE
- NAVIGATE OBSTACLE QUICKLY TO PROTECT TIME
- SET APPOINTMENT WITH TRIBE AND PURPOSE



OUR TEAM MATE

THE 5 STEPS

5. Get Your Line In The Water

The four steps above only take us so far in achieving our goals. If we are going to have success on the water catching fish the fundamental fact is that we have to get our line in the water. That means you have to propel yourself into taking action. Make it happen! You have a sense of your why, a plan, you have managed your schedule, and you got a guide. Now get out there!

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Bonus Tip Reflect on your experience

If you really want to take the fishing advantage to a new level try journaling. Taking stock in our experiences by reflecting on them can give us great insight into our lives. I find journaling about my experiences is a great way for me to reflect on what processes I should continue with, processes that can be improved, and things I can leave out. Many great people in history kept journals to jot down thoughts, ideas, and sketches. There is a powerful force that gets us moving towards our goals. Journaling transforms our ideas into something tangible in the real world that is what makes it powerful.

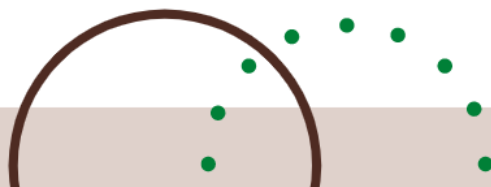


ACTION CHECKLIST

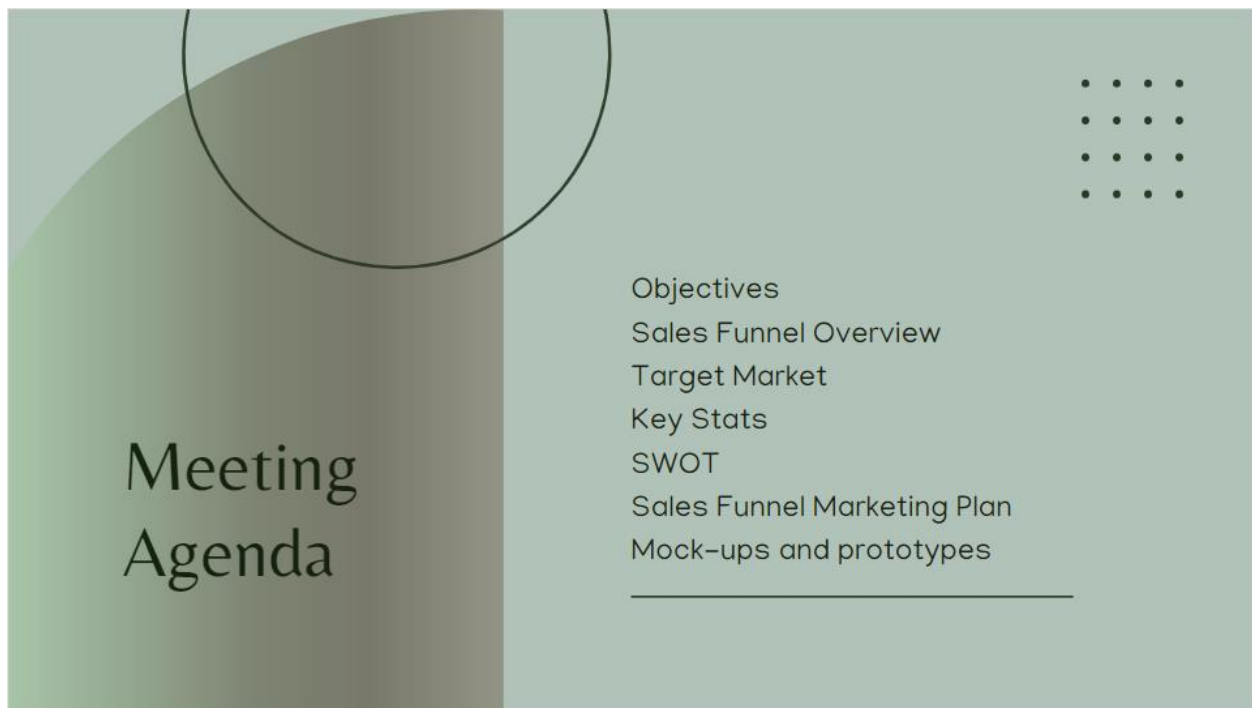
MAKE IT HAPPEN

JOIN KNOW YOUR TRIBE

REFLECT ON EXPERIENCE



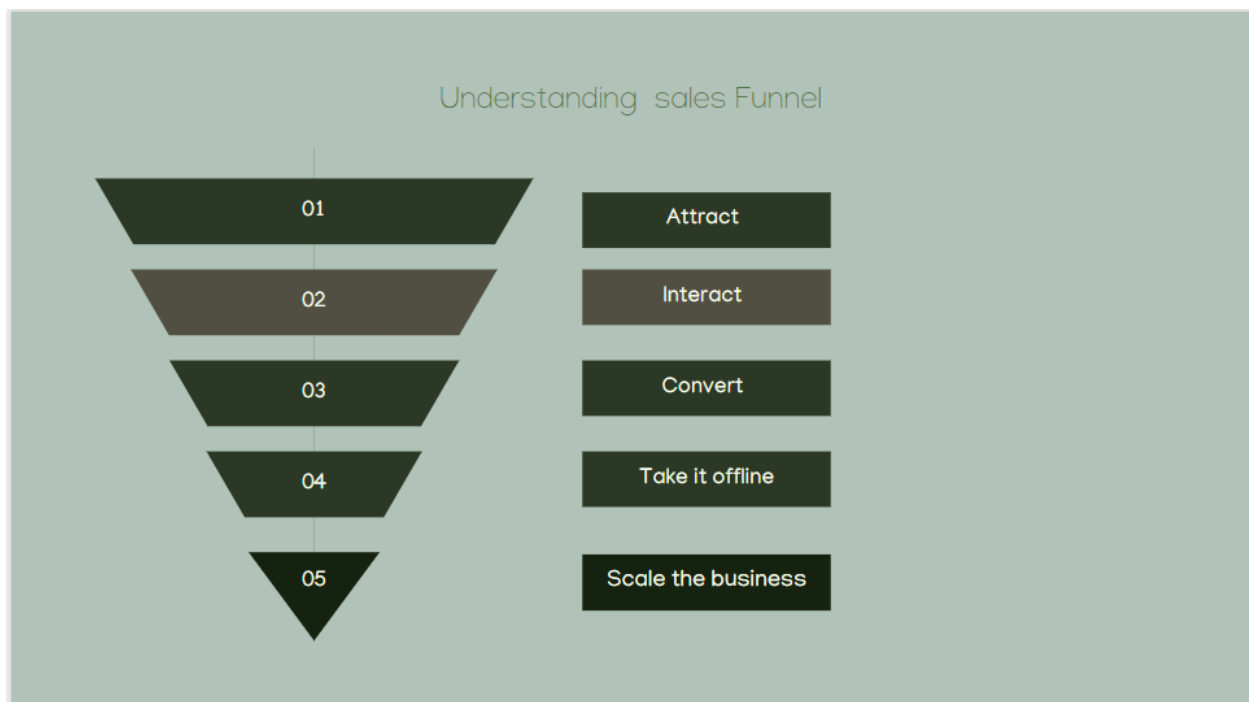
Appendix K: Final Client Presentation



Marketing Objectives

The slide features four icons arranged in a 2x2 grid, each with a corresponding marketing objective below it. The icons are: a globe, a group of three people, a magnifying glass, and a dollar sign. The objectives are: 'Enter Blue Ocean', 'Encourage Target audience through the sales funnel', 'Improve clarity of messaging', and 'Increase Sales by Scaling Business'. The slide also includes decorative elements like a green horizontal bar at the top, a grid of dots in the bottom left, and large circular graphics on the sides.

-  Enter Blue Ocean
-  Encourage Target audience through the sales funnel
-  Improve clarity of messaging
-  Increase Sales by Scaling Business





Target Market

Mason Jones



Hobbies

- Fishing

Problem Tribe and Purpose aims to solve

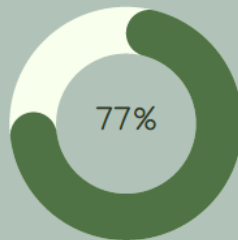
- Guide Mason to understanding benefits of purposeful hobbies

Key Survey Statistics

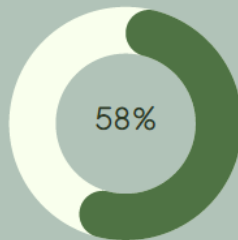
Response Rates to College Survey



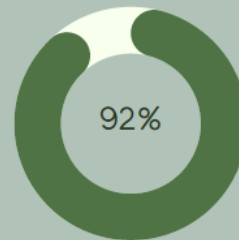
Does not participate in coaching



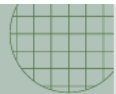
Pay >=\$50

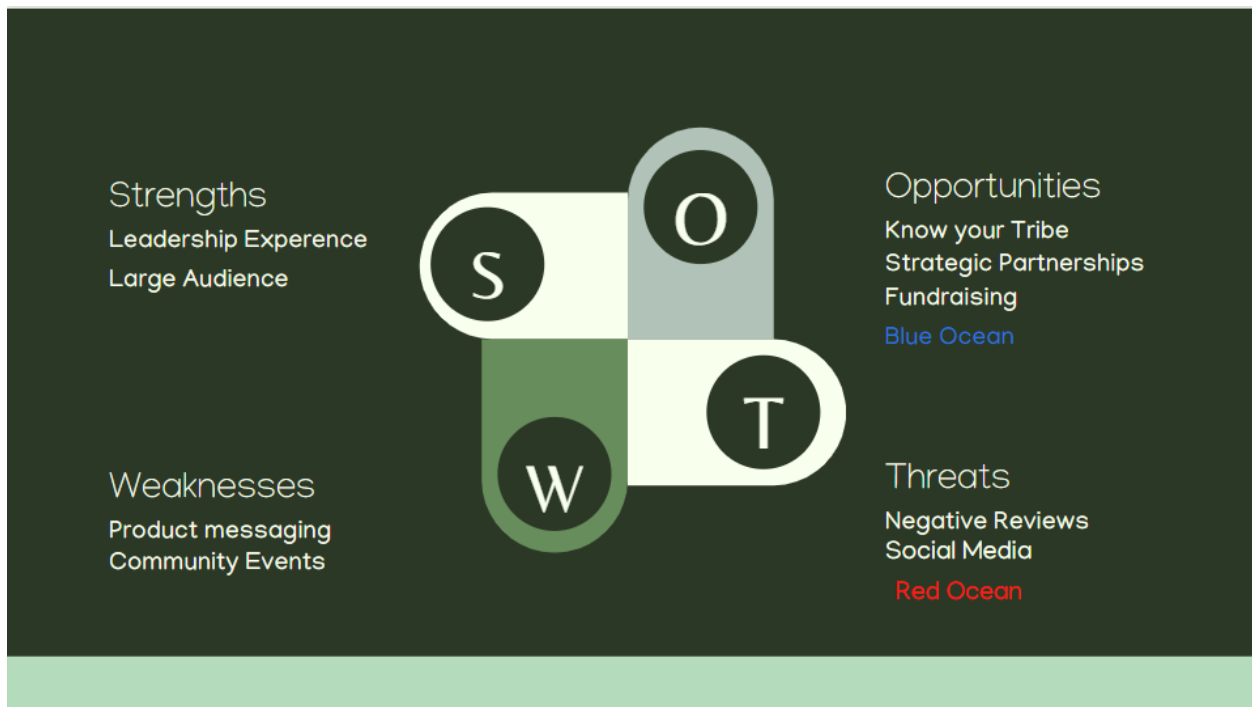
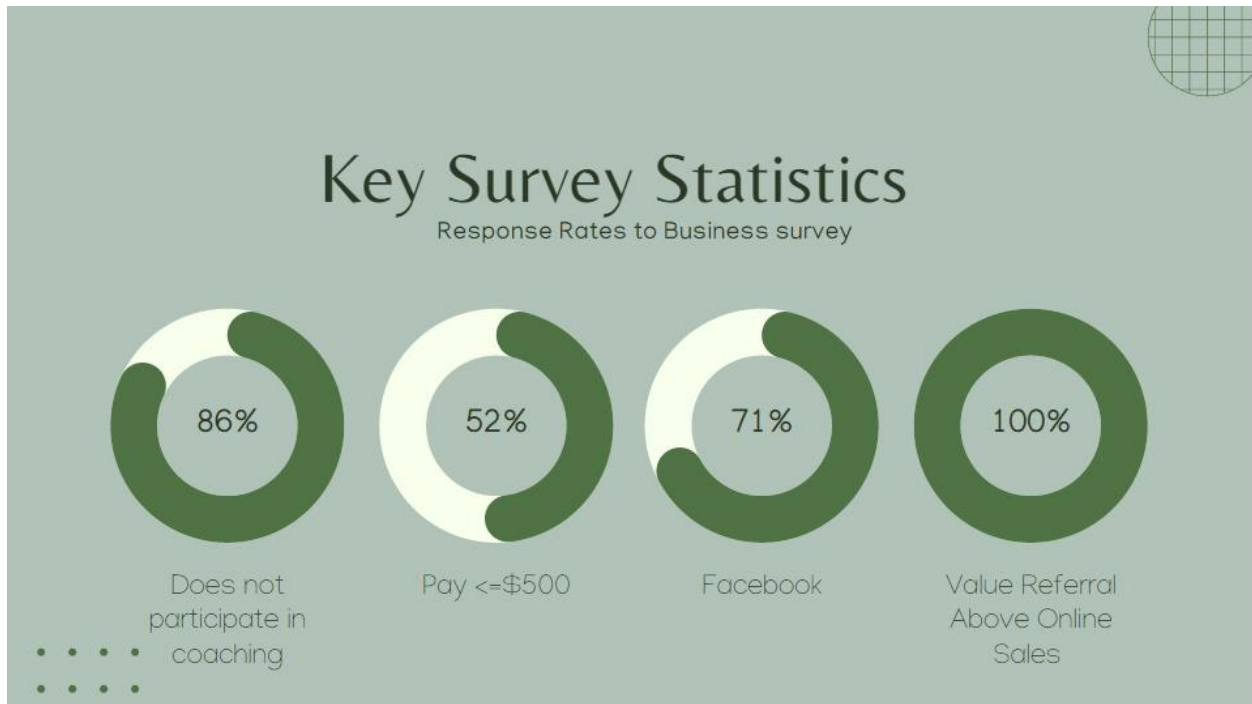


Facebook



Value Referral Above Online Sales





Attracting client- Moving into blue ocean

01

Attract

Drive traffic through education channel on Facebook

Customers will try free educational resources from platforms like Facebook

Based on survey results most people will not buy directly from Facebook Setting up your Facebook image to be an educational resource has a higher probability of Attracting client who is a 'life long learner'

Red Ocean

Blue Ocean

Business Consultant

Education

Interaction

Messaging

02

Interact

Current Advertisement

Improved Advertisement



Step 2 in funnel

Messaging and progression through funnel

02

Current Product



Interact

Improved funnel progression



Conversion

03

Current Process



Convert

Improved Process



Conduct Webinar

Opportunity to demonstrate benefits of Tribe membership

Revenue

Entry product \$10-\$30 per student

Recruit

Workbook screens for potential clients

The Fishing Advantage Workbook

<https://tribe-purpose.com/>

An Exercise in Elite Time Management

Convert Webinar into Know Your Tribe- Base product \$50 monthly

04

Take it offline

Benefits of Webinar

- Builds Trust
- Reveals Pain Points
- Gives Instructors time to follow up
- Produces leads for Know your Tribe

Convert Know your Tribe to Power Tribe premium
Product \$1000 Monthly

05

Scale the business



Recommendation

Apply for another BI Team

- Strategic Partnerships
- Talent Acquisition
 - Talent Placement