



RESEARCH. QUALIFY. GROW.

April 21, 2015

# CORPORATE PRESENTATION



# ABOUT ROI



# WHAT DOES ROI BRING TO THE TABLE?



## OUR EXPERIENCE

**OVER 100 YEARS**

Over 100 years of experience  
in demand creation.

**OVER 250**

Worked with close  
300 global economic development  
organization

**OVER 100 B2B**

Worked with over  
100 B2B clients

**4 YEARS**

Average 4 years of tenure per Research  
Associate



## OUR PROCESS

**360 DEGREES**

360 degrees service offering  
from strategy to implementation

**5**

5 quality control tollgates baked in our  
methodology

**Quality**

Quality over quantity



## OUR INTERNATIONAL FOOTPRINT

**OVER 25**

Over 25 languages spoken

**APCO WORLDWIDE**

Global Strategic Partnership  
with APCO Worldwide

**31 COUNTRIES**

Presence in 31 countries



## OUR INFRASTRUCTURE

**VISION CRM**

Proprietary VISION CRM

**10,000,000 CONTACTS**

10,000,000 contacts  
in our proprietary database

**OVER 50+**

Team of over  
50+ in-house Research



## OUR PROMISE: RESULTS

**91%**

91% client  
renewal rate

**HOT 50**

Hot 50 Company  
as selected  
by Profit Magazine

**E & Y**

Ernst & Young  
International  
Entrepreneur  
of the Year Finalist

**322%**

Average ROMI  
of 322%

# SOME PAST AND PRESENT ECONOMIC DEVELOPMENT CLIENTS



Georgia Department of  
Economic Development



Charlotte Regional  
Partnership



Calgary Economic  
Development



Arizona Commerce  
Authority



Montreal International



Amarillo Economic  
Development Corporation



CENTRECO



Denver South Economic  
Development Partnership



Invest in Finland



UK Trade & Investment



Paris Region Economic  
Development Agency



Invest Toronto



Thailand Board of  
Investment



Japan External Trade  
Organization



Invest Hong Kong



Ontario Ministry of  
Economic Development  
Trade and Employment



# ROI TEAM



**Steven Jast**  
President

- University of Western Ontario
- E&Y International Entrepreneur of the year Finalist
- B2B Sales and Marketing Expert



**Daniel Silverman**  
Vice President

- Graduate of OUEDI
- 10+ years in Economic Development and Investment Prospecting consulting



**Charlie Rowell**  
VP, US Operations

- MBA from Notre Dame
- 20+ yrs in jurisdictional marketing and Investment Prospecting



**Ryan Frankel**  
VP, Operations

- MBA from Yale
- 15+ yrs. B2B Sales and Marketing Executive

**Christiane Weiland**  
Director, Client Services

- Manages ROI's International Lead Generation teams
- Multi-Lingual
- 6 years at ROI with over 30 clients served



**Alice Flourent**  
Director,  
Client Services

- Trilingual BBA degree in Marketing from HEC Montréal
- Account Manager and then as a Project Manager business solutions division TC Media

**Emre Agrasoy**  
Director Operations

- Manages ROI's priority accounts including MEDTE, IHK,
- 8 years at ROI, over 65 clients served



# ROI DEMAND GENERATION: METHODOLOGY



# INNOVATION: TECHNOLOGIES AND A PROPRIETARY CRM FOR TRANSPARENCY, EFFICIENCY AND GROWTH

VISION

A cloud based solution based on an Oracle backbone

Proprietary database of 10M+ contacts and companies

Customized reporting from a menu of 300 possible reports

Real-time access via password and secure log-in

Regular status reports with insights and Business Intelligence



# INNOVATION: TECHNOLOGIES AND A PROPRIETARY CRM FOR TRANSPARENCY, EFFICIENCY AND GROWTH

## Meeting briefing profile and reports



AREA FOR LOGO

MEETING WITH: Citrus Communications Inc.

R Research

E Contact Information

**Name:** Mr. Mark Edelman  
**Title:** President and CEO  
**Direct line:** 1.514.448.1165  
**Mobile:** 1.514.444.1111  
**Email:** m.edelman@citrus.com  
**LinkedIn:** www.linkedin.com/mmedelman

M Meeting Logistics

**Booked by:** Aohan Rahman  
**Outlook invite:** Sent and accepted 03/11/2013

**Date and time:** 22/11/2013 @ 11:00 am  
**Alternative:** 22/11/2013 @ 1:00 pm  
**Location:** 4030, boul. Côte-Vertu, Suite 109, Montréal, QC H4R 1V4

**Appointment Instructions:**  
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S Company Summary

**Address:** 4030, boul. Côte-Vertu Suite 109  
**City, Province:** Montréal, QC H4R 1V4  
**Telephone:** 1.514.448.1165  
**Website:** www.citruscommunications.com

**Year established:** 1994  
**Number of employees:** 100-250  
**Number of locations:** single location  
**Industry:** Graphic Communications  
**Activity description:** Graphic Design  
**Revenues:** \$25-50 million

O Opportunity

P Project Description

**Opportunity:**  
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AREA FOR LOGO

MEETING WITH: Citrus Communications Inc.

L Lead Type

Level 1	Level 2	Level 3	Level 4	Level 5
Qualified lead with defined interest	Lead level 1 + budget & 24-36 mo. timeframe	Lead level 2 + 12-24 mo. timeframe	Lead level 3 + immediate need	Lead level 4 + immediate need

I Intelligence

B Business Intelligence

**Business challenge priority:** Workforce productivity  
**IT challenge priority:** Mobility and BYOD  
**Software used:** Photoshop and InDesign  
**Phone system:** BCH-400  
**Wi-Fi:** Sonic Wall  
**Current supplier:** Orange Communications

A Additional Contacts

**Name:** Mr. Mark Edelman  
**Title:** President and CEO  
**Name:** Mr. Mark Edelman  
**Title:** President and CEO

O Opportunity

P Project Description

**Other Comments:**  
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A Action Items

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**Next Step...**

T Tip of the Day

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N Notes

We'd love to know how this meeting went. Please provide feedback at [ROIinvest@ROIinvest.com](mailto:ROIinvest@ROIinvest.com)

Appointment information section includes a quick view of the date and time of the meeting, as well as the location of the meeting.

# INNOVATION: PROPRIETARY LEAD TRACKING & ENGAGEMENT SOFTWARE

## Lead Dossier and Tracking

The screenshot displays the ROI Funnel Fire software interface. At the top, there is a search bar and a 'MY ACCOUNT' link. Below this is a navigation bar with tabs for 'ALL', 'NEWS', 'SOCIAL MEDIA', and 'FAVORITES'. A 'Filter Feed by Keyword' search bar is also present. The main content area shows a news feed for 'Avaya' with three articles:

- Avaya selects Integrated Research's Prognosis for Avaya DevConnect SPP** (4 hours ago | News). The article text states: "Avaya, a provider of business communications and collaboration systems, has selected Prognosis, a performance management solution for Avaya Aura and other unified communications platforms, from Integrated Research for the Avaya DevConnect Select Product Program, or SPP, in Asia-Pacific. Avaya". It includes a link to "Read original at Individual.com" and social media sharing icons.
- Avaya Fabric Connect Enables Powerful Video Surveillance for Michiga...** (2 days ago | Social). The article text states: "The Troy Police Department recently grappled with how best to upgrade their video surveillance system throughout the city to provide optimum security for citiz...". It includes a link to "Read original post" and social media sharing icons.
- Global Unified Communication Market Size, Competitive Trends to 2020: Grand View Research, Inc.** (2 days ago | News). The article text states: "- Grand View Research.com has announced the addition of 'Global Unified Communication Market Analysis And Segment Forecasts To 2020' Market Research report to their Database. The global unified communication market ( www.grandviewresearch.com/industry-analysis/unified-communicatio...) is expected". It includes a link to "Read original at PR inside" and social media sharing icons.

On the left side of the interface, there are several filters:

- MY SHORT LISTS**: A dropdown menu.
- ALL MY COMPANIES (11) all none**: A list with a checked box for 'Avaya'.
- MY KEYWORDS all none**: A list of keywords with checkboxes: 'lead generation campaign', 'demand creation', 'RFP representation', and 'Technology fast 500'.
- A search bar with a 'Follow this Keyword' button below it.

At the bottom left, there are links for 'Terms of Service' and 'Privacy Policy'.

LEVERAGED FOR  
SMARTER OUTREACH

50,000 UNIQUE  
SOURCES

89% OF SALES REPS  
MISS OPPORTUNITIES  
BECAUSE THEY CAN'T  
KEEP UP WITH  
CUSTOMERS &  
PROSPECTS

Get the latest news and social data on all of your leads prior to the meeting, then continue tracking all of your leads over time so you can reach out at just the right moment with relevant, meaningful content.

# ROI MANDATE

- The provision of Market Research within the identified target markets to help identify companies exhibiting the need for expansion / relocation needs in which McKinney can provide a strategic advantage.
- Identification of geographic regions within the United States as well as internationally that currently house strong clusters of similar industries to those of McKinney's targets.
- Organization and execution of trade mission trips to the areas identified to include:
  - Setting of high quality pre-screened appointments with targeted industries.
  - Setting of additional meetings with site selectors within same regions that represent advantageous companies and industries for McKinney.

As part of this proposal ROI is proposing to:

- Market research report to identify geographic target markets
- Build a Target Company Prospect List
- Initiate calls with companies that have an identified interest in expanding, relocating to Texas and more specifically McKinney
- Generate qualified leads in the targeted sectors
- Schedule face-to-face and/or conference call meetings with pre-qualified companies and site selectors
- Have bi-weekly update meetings and submit a final report

Having supported the investment attraction efforts of over 250 international economic development organizations since 2003, ROI's team stands ready to offer our collective experience with best practices and lessons learned from the myriad of approaches our clients have pursued:

- A clear understanding of the MEDC goals and objectives
- Demonstrable knowledge of key markets
- A sufficiently experienced and senior team to ensure messages are delivered with the gravitas and clarity they require
- Experience of handling similar accounts
- The CV's of ROI team, demonstrating suitability, understanding of objectives and evidence of relevant experience within this sector
- A detailed methodology on how the lead generation activity will be delivered

# ROI MANDATE

## **Project Launch & Management**

- Project “Kick-off”
- Database programming
- CRM programming
- Project Launch minutes
- Weekly updates
- Final report

## **Target Market Identification Report**

- Identification of Primary target markets
- Identification of Secondary target markets
- Overview of markets and industry sectors
- ROI recommendations of geographic targets to pursue
- Meeting confirmation

## **Competitive Intelligence and Lead Generation**

- Database of 750 targeted companies
- Surveying of TCPL
- Segmentation of companies successfully surveyed
- Submission of segmented database to MEDC in Excel format
- License to ROI’s Funnel Fire

## **Pre-Qualified Meetings**

- Scheduling of 30-40 pre-qualified meetings on behalf of the MEDC team
- Scheduling of 12-20 site selector meetings on behalf of the MEDC team
- Detailed company profiles of each meeting
- Agenda management
- Meeting confirmation