SAMPLE COMPANY
National Marketing and Public Relations Plan

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INTRODUCTION

The following national public relations program is designed to assist SAMPLE COMPANY (D&T) in building national brand eminence and in facilitating greater coordination and integration of public relations activities. The execution of this plan will serve to increase the firm's profile and establish consistent internal communications across service lines, industry groups, and regional Business Development Centers (BDCs). As a result, the firm will be in a stronger position to build business, both through new business development and enhanced cross-selling, and to "win the talent war." The plan is divided into seven sections:

The focus of national eminence building activities (Section I) is on building leadership positions for firm leaders, Jim Copeland, Bill Parrett, and select partners, on issues that are timely and relevant to target audiences. An emphasis will be placed on identifying newsworthy firm resources, including expert spokespeople, research, and case studies.

The internal rollout of the national plan is outlined in Section II. A structure is created to educate firm leaders on the benefits of coordinated communications and the best practices for implementation of the program.

Section III introduces protocols both to leverage the regional strengths of the BDCs and utilize the BDC network to broadcast national messages.

Section IV discusses steps that must be taken to shield the firm from unfavorable publicity that may result from hostile regulatory action, litigation, or other crisis scenarios. As the firm proceeds with its 360-degree communications campaign, it is imperative that an urgent communications plan is in place.

To provide both a benchmark of current perceptions, as well as ongoing assessment of communications activities, measurement devices are provided in Section V. By conducting quantitative and qualitative analyses of brand coverage and audience perceptions, the firm can refine outreach techniques and analyze the return on investment.

Summaries of communications plans developed by NAME OF PR AGENCY to support selected service lines and industry groups are included in Section VI.

Finally, budget estimates are in Section VII.

Each component of this plan is designed to complement the 360-branding program being conducted on the global level. In concert, each element of the branding campaign will consistently reinforce messages, creating an image for the firm that will enhance its strength and effectiveness in the competitive marketplace. In the future, it may become cost-effective to directly combine elements of this national plan, such as measurement, monitoring, or research, into a unified global program.

Section I

National Reputation Management Plan

INTRODUCTION

Following are the elements of a public relations program designed to build eminence for the SAMPLE COMPANY brand with key audiences including: current and potential clients and employees; the marketplace; media; industry influencers; regulators and elected officials. Increased brand leadership will distinguish SAMPLE COMPANY within this highly competitive marketplace.

COMMUNICATION GOALS

Build Eminence

- Build eminence for the D&T corporate brand through the spokesmenship of Jim Copeland, Bill Parrett and other selected partners
- Distinguish the firm from its competitors within the marketplace
- Increase awareness of the firm's experience and capabilities within the business and financial communities
- Emphasize D&T's business model to reinforce benefits of full-service offering

Support Brand Equity

- Establish D&T as the 'ultimate' professional services brand
- Support and advance business growth and development objectives of the firm
- Partner with the 360º global branding initiative as it develops

STRATEGIES

- Leverage SAMPLE COMPANY's capabilities and integrated service offering to garner a leadership position within a competitive marketplace
- Focus and reinforce messages consistently to penetrate national target audiences
- Declare a leadership position(s) on issues relevant to the firm's objectives
- Influence public policy through constructive dialogue with policy makers, opinion leaders and regulators
- Support D&T messaging by utilizing partner expertise for media interviews, speaking opportunities, by-line articles, broadcast, etc.
- Measure results to calculate and maintain the effectiveness of the communications strategy

MESSAGES

While specific messages will be refined and tailored for each outreach opportunity, the following corporate themes should be reflected in all communications:

Messages	**Perception Goals**
Consolidated Services: *A multidisciplinary approach providing unparalleled client service*	• D&T has consistently advocated the need for a fully-integrated offering • D&T recognizes the role of a holistic approach in meeting the needs of its clients especially within a turbulent economy • D&T believes in the success of its business model
Employer of Choice: *The best employers attract the best people who offer the best client counsel*	• D&T offers the most capable and motivated professionals to assist both new and established companies achieve their business objectives • D&T retains its employees by providing a winning company culture
First-class Performance: *Consistently delivering superior results for our clients*	• D&T's counsel is sought out by both established brands and some of the most aggressively emerging companies in the nation • D&T provides superior client services – evidenced by Emerson's Client Satisfaction Study

AUDIENCES

- Current and potential clients: CXOs
- Prospective and current employees
- Media: national, business, financial, broadcast, regional, trade
- Thought leaders: think tanks, conferences, academics, financial and industry leaders
- Regulators and elected officials

TACTICS

Media Relations

Our media relations program within the eminence building portion of the national plan, will focus on communicating D&T's business strategy and resources, as well as management's expertise, through both proactive and reactive management of media opportunities. This will include responding to media inquiries and promoting D&T initiatives when instructed. Publications will include, but are not limited to the following:

Target Media

Top-tier Newspapers

- *The New York Times*
- *The Wall Street Journal*
- *The Financial Times*
- *Barron's*
- *USA Today*
- *Investors Business Daily*

Business Magazines

- *Fortune*
- *Forbes*
- *Economist*
- *BusinessWeek*
- *Leaders*

National Weekly Magazines

- *Newsweek*
- *Time*
- *U.S. News & World Report*

Electronic Media

- BusinessWeek.com
- Forbes.com
- Fortune.com
- Leaders Online
- Kiplinger.com
- UpsideToday.com
- CBSMarketWatch.com

Broadcast Media

- CNBC
- CNN
- CNNfn
- MSNBC
- CBS
- Bloomberg
- ABC
- CNET
- NPR
- PBS
- Fox
- NBC

New Economy

- *Industry Standard*
- *Red Herring*
- *Business 2.0*
- *Fast Company*
- *Upside*
- *Line56*
- *Wired*
- *Smart Money*
- *Money*
- *TheStreet.com*

IT Publications

- *Information Week*
- *EWEEK*
- *Telecommunications*

Trades

- *Accounting Technology*
- *Accounting Today*
- *Consulting to Management*
- *HR Magazine*
- *Strategic Finance*
- *CFO Magazine*
- *US Banker*

Major Dailies

- *New York Post*
- *Charlotte Observer*
- *Dallas Morning News*
- *Seattle Times*
- *Chicago Tribune*
- *San Jose Mercury News*
- *San Francisco Chronicle*
- *Los Angeles Times*
- *Atlanta Journal-Constitution*
- *The Washington Post*
- *Boston Globe*
- *Cleveland Plain Dealer*
- *St. Louis Post-Dispatch*
- *Denver Post*

- CNNfn.com
- CNBC.com
- Foxmarketwire.com
- ON24.com
- TheStreet.com
- C/Net News.com

Academic Publications
- *Harvard Business Review*
- *Columbia Journalism Review*

Newswire Services
- Associated Press
- Bloomberg News
- Dow Jones News Service
- Reuters
- Bridge News

QUARTERLY PERSPECTIVES

To provide a foundation for ongoing, relevant eminence building, we recommend the Quarterly Perspectives program, key issues or topics selected each quarter as the focus of corporate outreach. The Quarterly Perspective will serve as the basis for communications by Jim Copeland, Bill Parrett, and select partners. Each Quarterly Perspective will be designed to compliment and reinforce the corporate messages.

Within the framework of Quarterly Perspectives, it will be possible to efficiently focus and leverage SAMPLE COMPANY's expertise.

Following are the components of the Quarterly Perspectives initiative:

Perspectives Identification

A message task force entitled Perspectives Planning Analysis and Refinements ("PPAR") consisting of key SAMPLE COMPANY and NAME OF PR AGENCY representatives will select specific issues/topics. For example, some NAME OF PR AGENCY PPAR task force members may include any of the following:

- Hank Spring, Senior Vice President/Group Director
- Patrick Kinney, Senior Vice President
- Sandra Kelder, Vice President
- Steve Cohen, Vice President
- Joe Snodgrass, Account Director

The task force will meet during the last month of each quarter to identify the issue/topic for the upcoming quarter. Prior to each PPAR meeting, NAME OF PR AGENCY will identify and research a collection of issues for consideration. The task force will decide upon the perspective of the quarter. Upon selection, the task force will identify the most appropriate spokesperson for each Quarterly Perspective. For example, Mr. Parrett might speak to the future of the professional services industry and Mr. Garland might speak to the latest developments in the audit profession.

Potential issues for Q1 include, but are not limited to the following examples:

- The Future of the Financial Services Industry: With the new ruling adopted by the SEC on November 15, 2000 creating new dynamics within an already competitive playing field and contributing to significant shifts in ownership structures throughout the industry, SAMPLE COMPANY may speak as an authority on subjects including but not limited to the following:
    - *The Opportunities:* "The Multidisciplinary Approach"
    - *The New Economy:* "The Intangible Audit"
    - *State-of-the-art Technology:* "The Audit of the Future"

  Possible Spokespersons: Jim Copeland and Bill Parrett

- 2016 Tax Issues: As the Bush administration takes office and Americans begin to prepare for tax season, SAMPLE COMPANY may speak as an authority on subjects including but not limited to the following:
    - *Advice for Treasury Secretary Designate, Paul O'Neil:* "Which buttons to push and when to push them."
    - *Tax policy issues*: "The potential impact of pending tax bills on individuals and businesses."

  Possible Spokespersons: Barry Salzberg and Clint Stretch

- Managing Risk in the New Economy: As rapid technological change, market fluctuations, and economic uncertainty continue in today's marketplace, SAMPLE COMPANY can leverage its expertise on the areas of Enterprise Risk Services, and e-Business. SAMPLE COMPANY can position itself as an industry expert within this dynamic marketplace. Topical issues may include:
    - *Data security and privacy:*
        - "Use of online personal data – Corporate responsibility versus corporate profits."
        - "Where are current security/infrastructure developments leading business practices for the next generation?"
        - "Whose hacking your business and why? – The psychological make-up of a hacker and your corporate risk"

  Possible Spokesperson: Ami Kaplan

- Employee Benefits and Human Capital: Provides a platform to leverage a number of editorial calendar opportunities that will be published during the second quarter in publications such as *Forbes*, *Fortune*, *BusinessWeek*, and *The Wall Street Journal*, but will require outreach during the first quarter. Topics that could be addressed include:
    - *Executive compensation*: "Are women MBAs getting paid less than men? - It's impact on recruitment in the audit industry."
    - *Employer of choice*: "How to inspire commitment in the workforce."

  - *Staffing levels, recruiting challenges and market uncertainties*: "Does the U.S. have an unequal regional distribution of intellectual capital? What CEOs can do to secure their share of a limited supply of talent."

Possible Spokesperson: Ainar Aijala

- Speeding Safely into The New Economy: Utilizing its knowledge acquired in advising both technology start-ups and large companies making the bricks-to-clicks transition, SAMPLE COMPANY can contribute to discussions addressing the most recent technological developments effecting the economy. Topics for discussion may include:
  - *The B2B railroad*: "The Internet as a business enabler not a business."
  - *Lessons learned moving into the next generation of e-business*: "The IPO conundrum."

Possible Spokesperson: Anne Taylor

Resource Allocation

Following the selection of the Quarterly Perspectives, NAME OF PR AGENCY will work with SAMPLE COMPANY to identify resources in key industry groups and service lines that may be used. These include but are not limited to:

- Research
- Case studies
- Jim Copeland, Bill Parrett and select partners as spokespeople

Quarterly Calendars

Following identification of the topic and applicable D&T resources, NAME OF PR AGENCY will develop a calendar of outreach activities for the quarter that will utilize the Quarterly Perspectives to promote the SAMPLE COMPANY brand. Calendars will include:

- Media relations
- Speaking engagements
- Internal outreach
- Sponsorship opportunities
- Philanthropic activities

Additionally, NAME OF PR AGENCY will work with SAMPLE COMPANY to take advantage of appropriate opportunities, such as research promotion, media inquiries, editorial calendars, and speaking forums, that may fall outside of the parameters of the Quarterly Perspective.

EXECUTIVE VISIBILITY PLANS

Following are targets and opportunities for Jim Copeland and Bill Parrett through fiscal year end. Detailed timelines for reaching both internal and external targets will be included in the quarterly calendar.

Both Messrs. Copeland and Parrett should be positioned as key industry and issue leaders on significant economic and business trends in the U.S. The internal outreach tactics are intended to educate key internal stakeholders on key messages, and Quarterly Perspectives.

Messrs. Copeland and Parrett will carry out this initiative with coordinated visits to partners, key clients, community influencers and media. A typical itinerary in one geographical region might include spending time with partners, clients, and regional editorial boards. A summary of each executives' travel plans should be forwarded to NAME OF PR AGENCY, so that we may coordinate the quarterly calendars.

NAME OF EXECUTIVE

Media Opportunity Calendar

- *Fortune*: Leaders of the Next Generation, March
- *Forbes*: The Best Places for Business and Careers, May
- *Worth:* The Worth 50: The Best CEOs, May
- *The Industry Standard*: Business Transformation, July
- *Worth:* The 100 Most Powerful People of the Money Culture
- *Fortune*: Expanding Your Business Globally, October
- *Inc.*: Leadership in the New Economy, November

Speaking Opportunities

- World Economic Forum, Washington, DC, April
- Chamber Federation Global Summit, *One Voice for Trade,* May
- Top-tier MBA Commencement Ceremonies, May
- The Second World Chambers Congress, June
- The *Forbes* CEO Forum, June
- *BusinessWeek,* Breakthrough: A CEO Retreat, June
- *BusinessWeek,* The CEO Summit, September
- The Gilder/*Forbes* New Economy Conference, October
- *Fortune* Summit on The Best & Most Admired, November
- CEO Leadership Summit, January 2002

Internal Outreach

- Regional Tour, Roadshow, Streaming Video Web Presentation, Newsletter

NAME OF EXECUTIVE

Media Calendar Opportunities	- *Fortune:* Capital Ideas: Tax Audits, April - *CIO:* Managing Rapid Growth, May - *CIO:* Staffing Strategies, May - *The Industry Standard*: E-Services, August - *Inc.:* The "V" Spot: Secrets to building your business's value, October - *Industry Standard GROK,* Special Report, Financial Services, November
Speaking Opportunities	- Business for Social Responsibility, 'Best of the Best', March - *The Economist,* 2016 Roundtable with the Government of Venezuela, March - *Forbes* Presidents Forum, April - US Chamber of Commerce Association, Leadership Series 2016, April - Business for Social Responsibility, Business/Schools Partnerships Summit, April - Association of American Chambers of Commerce in Latin America (AACCLA), May - *Crain's Chicago Business,* 2016 Government Conference, May - U.S. Conference of Mayors Annual Meeting, June - The Forrester Finance Forum, June - *The Industry Standard,* Standard U, June - The UN Economic Commission for Latin America, July - Business for Social Responsibility, 2016 Learning for The Future, November - *Fortune* Summit on the Best & Most Admired, November
Internal Outreach	- Targeted Roadshow, Streaming Video Web Presentation, Newsletter

Executive Visibility Team

While Messrs. Copeland and Parrett will serve as the top spokespeople in national eminence building efforts, their work will need to be reinforced by other partners within the firm. Partner selection will be depend upon the specific outreach opportunity and Messrs. Copeland or Parrett's availability. These partners will likely be employed when their area of expertise is encompassed by the given Quarterly Perspective.

AWARDS AND SPONSORSHIP OPPORTUNITIES

SAMPLE COMPANY can position its brand in front of key thought leaders through the firm's participation in targeted events and initiatives. Such branding opportunities include:

- Signage at events attended by target audience members
- Advertising opportunities in key publications, Web sites, and event programs
- Hosting of and participation in strategic events

- **Potential award opportunities include:**
  - *Forbes* 500, America's Leading Companies, April
  - *Forbes,* Best Places for Business and Careers in America's New Economy, May
  - *Forbes,* The e-Gang/Forbes International 500 Survey, July
  - *Forbes,* 500 Largest Private Companies, November
  - *Inc.,* Best of Inc.: Nationwide search reveals most effective management tools and techniques, December
  - *Fortune,* Most Admired, December
  - *Fortune*, Best Employers, December
  - *BusinessWeek,* Top 25 Managers of the Year, January

- **Potential sponsorship opportunities include:**
  - Town Hall Meetings in target regional communities addressing current social issues. Examples may include but are not limited to the following:
    - "Education in the 20th Century" partnering with the Institute for Higher Education
    - "The Internet Economy – Is It Reshaping America's Geography" co-sponsorship with the *Industry Standard*
    - "The Value of Community Service in Our Cities" in conjunction with the National Conference of Mayors
    - "The State of Inner-city Education" co-sponsorship with the Urban Institute
    - "The Value of Mentorship" in conjunction with Big Brother/Big Sisters
  - Philanthropic Activities: such as sponsoring Teach for America
  - *Specific opportunities may include*:
    - SIA E-Business Strategy Conference & Exhibit, April
    - E-Business Battle Royale Conference, April
    - The Forrester Finance Forum, June
    - The *Forbes* Challenge, September
    - E-Business Summit, October
    - The Gilder/*Forbes* New Economy Conference
    - The Sixth Annual Business Week Conference on the Digital Economy
  - Sports & Entertainment - such as D&T's current professional golfers sponsorships including Robert Damron, Michelle McGann and Stewart Cink

PHILANTHROPY

All good companies have a presence in the communities they operate in and patronize worthy causes. The best companies coordinate these activities with the overall mission and core values of the brand in a way that raises awareness of these relationships while not appearing self-congratulatory.

The SAMPLE COMPANY foundation's funding of education programs for accounting students and professionals is well respected within the accounting community, but may not resonate in a meaningful way beyond that narrow audience. Previously, the firm has embraced some special causes of executives, for instance through former chairman Kangas' involvement with Multiple Sclerosis. We recommend building on these programs with a more strategic, community based giving program which is consistent with the core values of the firm. Raising the awareness of SAMPLE COMPANY's philanthropic activities will assist in building the eminence of the firms leadership and of the overall brand. To do this we must consider several factors, including:

- Current SAMPLE COMPANY foundation activities
- Individual giving histories and priorities of D&T executives
- How best to bring more power and relevance to the firm's charitable giving program
- Balancing the desire to publicize D&T's giving without being self congratulatory
- Coordinating the charitable activities of the leaders of the firm with a strategic philanthropy program

Conducting an audit of both individual executive's and the firm's philanthropic activities over the past three years is the first step in designing a powerful strategic philanthropy program. In this audit we would analyze the firm's formal giving program and interview selected executives to ascertain their current charitable initiatives/priorities. In addition we would conduct an analysis of the other Big 5 corporate giving programs. Finally, we would deliver a formal recommendation for a strategic philanthropic initiative.

RESEARCH PROMOTION

Promoting annual in-depth research such as the Future of Managed Care Survey and the 401K Plan Benchmarking Survey and others to provide a solid platform to raise the eminence of D&T and to help establish D&T's expertise with broadcast and print media.

Interviews for D&T spokespeople, such as Ainar Aijala of Human Capital, will be secured with top-tier business and consumer media to expound upon survey results, and establish D&T spokespeople as experts. In addition, NAME OF PR AGENCY will use its media relationships to promote surveys and guarantee D&T

messaging through use of Satellite Media Tours, Audio News Releases and expanded coverage in top morning shows and editorial broadcast programming. Finally, to aid BDCs in garnering local coverage of D&T surveys, NAME OF PR AGENCYwill develop public relations tool kits that map out how to secure print and broadcast interviews and keep journalists coming back for more.

TIMELINE

Following is a proposed calendar of next steps for the first half of 2016:

Q2 Quarterly Perspective

- Monday, February 26: NAME OF PR AGENCY begins research to identify potential Q2 issues
- Friday, March 2: Message Task Force meets to identify Q2 issue
- Monday, March 5: NAME OF PR AGENCY begins Quarterly Review
- Wednesday, March 21: NAME OF PR AGENCY delivers Q2 Quarterly Calendar
- Monday, April 2: NAME OF PR AGENCY begins executing approved elements of Quarterly Calendar

Q3 Quarterly Perspective

- Monday, May 14: NAME OF PR AGENCY begins research to identify potential Q3 issues
- Friday, June 1: Message Task Force meets to identify Q3 issue
- Monday, June 4: NAME OF PR AGENCY begins Quarterly Review
- Wednesday, June 20: NAME OF PR AGENCY delivers Q3 Quarterly Calendar to SAMPLE COMPANY
- Monday, July 2: NAME OF PR AGENCY begins executing approved elements of Quarterly Calendar

Section II

Program Rollout

To successfully roll out the National Eminence Building Program and integrated communications strategy, SAMPLE COMPANY needs the buy-in and enthusiastic support of its senior leadership, key partners and administrative professionals.

In addition, as SAMPLE COMPANY builds its national brand eminence, it must solidify a common culture. Culture and communications are inextricably linked to brand building from the inside out. The following initiatives aim to engage and enroll SAMPLE COMPANY partners, who will in turn motivate performance and align employee behaviors with company goals and strategies. A list of internal messages and desired employee perceptions that support the SAMPLE COMPANY corporate themes can be found following this section.

The three stages that define the process of unifying employees to support this major initiative are:

1. Engage Partners
2. Enroll Partners
3. Energize the organization

ENGAGE

Engaging Partners in an integrated communications program means building awareness, and understanding of the value of the national public relations plan. The following tactics can be used to engage the partnership in building the national brand eminence of SAMPLE COMPANY.

Leadership Email

Senior SAMPLE COMPANY leadership should introduce and articulate the integrated communications strategy in an email to all Partners. The email should not only provide details of the new strategy, it should demonstrate the importance of coordinated national communications and the role each Partner can play in supporting this effort.

Senior Leadership Roadshow

As recommended in the National Eminence Building Program, Messrs. Copeland and Parrett and other appropriate senior leadership will be positioned as key industry and issue leaders on significant economic and business trends in the U.S. In addition to coordinated visits to key clients, community influencers and the media, a typical itinerary for Messrs. Copeland and Parrett should also include hosting Partner meetings at regional offices. This is also an opportunity for Messrs. Copeland and Parrett to personally present the brand vision of the firm and its stance on important business and policy issues.

A sample agenda for such meetings might include:

- National Eminence Building Program overview
- Q&A session
- discussion of the role that all Partners will play in SAMPLE COMPANY's future
- informal walk-arounds through the offices
- personal follow-up to questions

** Understanding that this may be logistically challenging, we suggest that other select senior management team members be enlisted to host town halls at sites where Messrs. Copeland and Parrett are unable to visit due to scheduling conflicts.*

ENROLL

Once Partners have an understanding of and appreciation for the value of the National Eminence Building Program, they should be "enrolled" in the communications strategy. This is the point at which Partners can play a roll in advancing the strategy, with colleagues and peers. The following sample tactics can be used to enroll partners in support of the National Communications Plan.

Regional Roll-Out Meetings

Local Partners or select BDC/service line representatives can conduct meetings in each U.S. office to present the National Eminence Building Program. Each meeting host would be provided with a meeting tool kit to include:

- National Eminence Building Program overview presentation
- Case for integrated communications
- Examples
- Q & A

"Star Search" Expert Identification Program

This initiative can be used to identify experts throughout national offices on a variety of industries and subjects for the BDC's database and to involve Partners in the communications strategy.

BDCs can establish a listing of categories for which they'd like to identify "experts." Partners will be asked to nominate qualified professionals in their offices. Once nominated, the experts will be media trained, and entered into the Extranet database as suitable spokespeople on established topics. When experts are quoted in the media, serve as speakers, or are called on for other public appearances, they will be recognized nationally via a print or electronic announcement.

Bi-Weekly Communication Updates

Every two weeks, the BDCs can capture communications highlights and compile clips and other useful information in a hard-copy publication that is sent to Partners. The publication will help illustrate the yield of the integrated communications strategy on an ongoing basis. It should include:

- Message from leadership
- National coverage highlights
- "Star Search" profiles – features on identified subject "experts"
- Media Quick Hits – as needed, important placements can be highlighted and distributed via email announcement

ENERGIZE

Once Partners have been engaged and enrolled in the communications strategy and the themes that drive it, they can in turn energize employees in local offices and help to integrate the firm workforce on a national level. With partnership support, programs that educate, unite and motivate SAMPLE COMPANY employees will ultimately energize the organization – employees will be excited about working at SAMPLE COMPANY, an employer of choice and Big 5 leader. In addition to SAMPLE COMPANY possible participation in programs like the *Forbes* Challenge, the following are other possible programs designed to soften boundaries between regional offices and service lines. These events will stimulate cross-selling, increase overall business understanding and bring the SAMPLE COMPANY brand themes to life through its people.

Business Education Program

Coupled with an increased understanding of the firm's overall vision and strategy, increased understanding of the different service lines within the firm will encourage collaboration among the BDCs and practices. The Business Education Program might include the following elements:

Develop Fact Sheets

NAME OF PR AGENCY teams will work with the various corresponding SAMPLE COMPANY service lines to develop fact sheets and key messages that outline the functions and values of various service lines.

Meeting Facilitation Toolkits

Our employee communications team will take service line-specific fact sheets and key messages and use them as the foundation for meeting facilitation toolkits created for presentation during staff meetings. Toolkits could include:

- Service line overview
- Key contacts
- How to spot a client opportunity
- Related service lines
- Industry trends
- Glossary of terms
- Contacts
- Q & A

SAMPLE COMPANY News

NAME OF PR AGENCY will also work with SAMPLE COMPANY to tailor content of existing employee news vehicles to profile industry groups and service lines as well as each BDC.

Intranet Information

Educational materials about the breadth and depth of SAMPLE COMPANY's business offerings should also be available as a resource and accessible by all employees. We recommend that these materials be posted on the Ogilvy/SAMPLE COMPANY extranet and be integrated into the work currently being conducted by NAME OF PR AGENCY.

Cross-practice Panels

Discussion panels, comprised of partners from various service lines, can be scheduled. Partners can present in a round-table format and field questions about their day-to-day activities and how their work fits into the larger SAMPLE COMPANY vision. To expand the reach of these panels, sessions can be web cast to all parts of the firm.

Other means of raising the visibility of other practices can also include more grass-roots level activities such as a themed contest/quiz, giveaways or promotion posters/materials to announce an upcoming discussion panel.

"No Boundaries" Reward and Recognition Program

SAMPLE COMPANY should establish a program that is open to all employees to emphasize the importance of cross-selling while creating a common culture to which all employees contribute equally. Drawing on support from Cluster Managing Partners and other senior leadership, an online incentive program posted on the company Intranet can be rolled out nationally and promoted through a firm-wide launch campaign.

Policies and procedures should be established to encourage, document and reward instances of cross-selling and recognize employees who consistently exhibit behaviors and take actions that promote knowledge sharing across BDC boundaries. Examples of knowledge-sharing include recommendations to improve the overall business and ways to promote SAMPLE COMPANY's marketplace reputation.

Employees will be nominated for the "No Boundaries" reward by supervising partners or colleagues. Recipients should be publicly recognized.

Brand Ambassador Program

A SAMPLE COMPANY brand ambassador program should be launched upon completion of the NAME OF PR AGENCY360 Global brandprint. Initial planning and infrastructure building for this initiative could begin during the upcoming months. The buy-in of employee "brand ambassadors" selected nationwide throughout the firm will create a viral effect, adding credibility to a traditional communications program.

For a company's brand promise to succeed in the marketplace, it must first come to life in the workplace. Creating brand ambassadors of your employees requires that they have a clear understanding of the company brand, and the importance of projecting that brand to the marketplace, as well as the opportunity to influence and shape it. The company brand must be well understood by employees and reinforced through company actions and communications. Tactics to support this program will include:

Off-site Meetings

- Hosted by Messrs. Copeland and Parrett or local senior leadership to lend weight to the renewed focus on the brand initiative and its subsequent role in the future goals of SAMPLE COMPANY, while providing an opportunity to increase senior leadership's visibility
- Invitees will include all Partners as well as client service professionals and administrative professionals selected for their interest and abilities in leading a brand-building emphasis among their colleagues
- Key messaging will be developed and shared about the importance of branding throughout the firm including, how the brand will affect each employee personally in his/her day-to-day work and discussion forums about the results of the NAME OF PR AGENCY,brandprint, ways to improve the business via the brand values, plus a brand Q&A

Grass Roots Initiative

- These new “brand ambassadors” return to their local BDCs and offices to cascade these messages to colleagues in supporting integrated communications, building the SAMPLE COMPANY brand

Supplemental Materials

Collateral can include:

- Special section on the SAMPLE COMPANY intranet
- Promotional premiums distributed by brand ambassadors to fellow employees
- Meeting facilitation toolkits to cascade messages
- Special content in employee newsletters and other communications

Section III

Infrastructure

The success of SAMPLE COMPANY's National Eminence Building Program depends in part on the effective use of the BDC communications infrastructure and process. This plan addresses that goal.

The organization of SAMPLE COMPANY's Business Development Centers (BDCs) provides an efficient infrastructure to implement cohesive marketing, public relations and advertising programs across the United States. This framework can likewise be leveraged as a two-way employee communications channel among offices nationwide, supported by an Extranet to facilitate the continuous flow of information.

Communication Goals

- Establish a process within the BDC framework to facilitate the flow of internal and external communications for consistency and clarity
- Encourage collaboration across BDCs to promote cross-selling.
- Increase partnership awareness of BDC capabilities
- Build consensus among BDC leadership, client service and administrative professionals about the value of an integrated communications strategy and delivery process

Strategies

- Use the BDCs to integrate internal and external communications among service lines, BDCs and National Offices
- Use the integrated infrastructure of marketing, sales, communications and research staff of BDCs to cascade messages to improve the flow of communications and enhance collaboration
- Develop and promote the use of the Extranet to facilitate the communications process and flow of information

Audiences

- Firm leadership
- All Partners
- Client service professionals
- Administrative professionals

BDC COMMUNICATIONS PROCESS

Coordinated communications among the BDCs, select service lines and industry areas will contribute greatly to the success of the national eminence plan. Institutionalizing processes and tools to manage the flow of communications among these professionals will help:

- Leverage national thought leadership in local markets
- Implement local public relations programs
- Maximize local public relations programs into national opportunities
- Manage crisis communications
- Facilitate coordinated (two-way) employee communications

Three examples of how the BDC process can be successfully implemented are outlined in Tab 4 in the appendices document.

SAMPLE COMPANY/NAME OF PR AGENCY WORLDWIDE EXTRANET

NAME OF PR AGENCY's proprietary client Extranet should serve as the central coordination point and database for all of SAMPLE COMPANY's communications activities. The Extranet can be scaled to meet the growing needs of the firm, and will ultimately serve as the firm's "virtual file cabinet" for all of its communications needs and resources.

An Extranet is an efficient communication tool due to the flexibility and simplicity of its design. Access to use and modify the site will be given to only authorized SAMPLE COMPANY and NAME OF PR AGENCY account team members. A detailed description of the extranet is outlined in Tab 5 of the appendices document.

BDC PLAN PROMOTION

It's critical that the BDCs and service lines are supportive of integrated communications. A plan to help educate administrative professionals on the value of this strategy and will demonstrate how the Extranet can facilitate communications can be found in Tab 6 of the appendices document.

Section IV

Urgent Communications

INTRODUCTION

As SAMPLE COMPANY begins to implement a 360-degree branding campaign, it is crucial that steps are taken to protect and guard the brand from negative publicity.

The following plan is designed to enable SAMPLE COMPANY to protect the brand by anticipating potential problems and preparing for such possibilities, skillfully navigating them when they occur, and rejuvenating the brand after a crisis situation occurs. NAME OF PR AGENCY intends to initiate due diligence efforts in order to assess procedures and resources already in place.

PHILOSOPHY

The strength of NAME OF PR AGENCY in crisis management lies with a series of tools, methodologies and captured experiences. All these are put together under **"**BrandShield**"** – a crisis management product which protects the brand. BrandShield is designed to defend corporate brands by helping organizations avoid, handle and recover from crises.

We break down crisis management to three phases – preparedness, handling and recovery.

Preparedness

Many companies focus on how to respond to the most extreme crises and overlook the thoughtful planning required to be prepared in predicable areas of vulnerability.

We propose having an NAME OF PR AGENCY crisis team work with national communications and the general counsel's office to develop a crisis response manual. That manual would contain possible crisis scenarios, key messages, draft stand-by statements, relevant case studies and a crisis response team infrastructure that will enable SAMPLE COMPANY to make a swift and accurate public response.

Handling

Responding quickly during the beginning of a crisis is a critical component of effective crisis management. We will work with the appropriate SAMPLE COMPANY management to assess the current resources available to assist in crisis response e.g. designated war rooms, written procedures and division of responsibilities. Additionally, we will make recommendations to heighten coordination and ensure all crisis response team members are working cohesively. We employ several tools to harness the power of technology to make for a faster response including the construction of "dark" Web sites to be illuminated in times of need and real time electronic monitoring of the World Wide Web.

Recovery

Aside from not being prepared, the most common mistake organizations make is thinking that when the activity that caused the need for urgent communications has passed that the crisis is over. We refer to this as the recovery phase. We strongly recommend staying in "crisis mode" and continuing to communicate to the media and other influencers to control the dialogue that follows. Often times silence is mistaken for insensitivity, negligence or worse. Qualitative and quantitative research is integral in determining the lingering impact of the crisis on the brand among core audiences.

To successfully manage these phases, we recommend taking the following steps to analyze and enhance the SAMPLE COMPANY urgent communications plan.

PROCESS

To effectively design an urgent communications plan for SAMPLE COMPANY, NAME OF PR AGENCY will work with internal counsel to assure that the plan can be implemented effectively using the following steps:

- **Risk Assessment Audit** - Through interviews with key senior executives in SAMPLE COMPANY corporate offices, the various service lines and the BDCs, NAME OF PR AGENCY team members assess high-risk situations which may evolve into crises. We will make use of existing processes to identify potential scenarios on an ongoing basis. Team members will also review existing internal response procedure to identify appropriate best practices.
- **Urgent Communications Manual** – The urgent communications manual is the cornerstone for the detailed execution of all activities pertaining to the crisis management process. The manual is customized to efficiently handle all contingencies relevant to the firm. The manual includes the following components:
    - **Priority Situations** - Priority situations are identified after evaluation of the risk assessment audit, which are most pertinent to SAMPLE COMPANY. NAME OF PR AGENCY will target specific tactics and institute steps to be followed in these situations.
    - **Infrastructure** - A detailed infrastructure consisting of customized crisis teams by priority situation, contact information, division of responsibilities as well as logistical procedures is developed. The team will be determined based on feedback from each of the senior executives. In the event of a crisis, this infrastructure will be used to

insure timely, accurate, two-way communications between corporate, the service lines and the BDCs as appropriate.
  - **Key Messages and Draft Materials** – To further ensure a consistent flow of information, key message points are created which address priority crisis scenarios. These messages are the foundation of all communications surrounding the event, which will be integrated into draft statements and releases, which can be tailored per each situation. The messages provide a set of facts and parameters for all communications going forward. Additionally, these messages will be developed with the 360-degree global campaign messages in mind, to insure the protection of the brand identity.
  - **Case Studies** – Case studies are developed for each priority situation and the tactics and steps taken are analyzed to convey lessons learned in each individual crisis.
- **Media Training** – NAME OF PR AGENCY recommends conducting urgent communications media training. This training will be given to the crisis response teams as well as the firm's spokespersons.
- **Extranet** – A password-protected section of the extranet will be dedicated to all urgent communications.

PRELIMINARY TIMELINE OF ACTIVITIES

SAMPLE COMPANY Urgent Communications Timeline

- Week of 2/26 – Meet with National communications staff and General Counsel
  - Outline current capabilities and process
  - Identify likely scenarios
  - Finalize project timeline
  - Assign responsibilities
  - Set risk assessment interview schedule

- Week of 3/5 – Draft interview questions for approval
  - Schedule interviews
  - Begin case study research

- 3/12 – 3/30 – Conduct interviews

- Week of 4/9 –Submit draft outline of BrandShield manual for review

- 4/9 – 4/20 - Make edits to draft manual and submit for review

- Week of 4/23 – Make final edits and produce SAMPLE COMPANY Brand Shield Manual

Section V

Measurement

OBJECTIVE

- Ongoing evaluation to measure impact of communications activities of SAMPLE COMPANY
- Demonstrate differences in perceptions and ratings between D&T and other "Big Five" firms
- Provide "snapshot" that shows overall environment for acceptance of D&T among those "influential" in the sales process
- Measurement of <u>awareness</u> of the firms, <u>knowledge</u> of the services offered, <u>interest</u> in purchasing, recommending or approving services offered by each firm and <u>intent</u> to purchase, recommend or approve selection of firm

RESEARCH DESIGN

National Corporate Image

- Quarterly survey of approximately 500 business influencers and decision makers in the United States who have been or may be involved in the decision making process for the selection of a firm for an accounting, tax, audit or consulting engagement *(Buyers)*. The distribution of interviews will be developed in conjunction with D&T
- Sample to include influencers and decision makers who could potentially influence the purchase decision for each of the major practices, divisions and business lines of D&T
- Study to be conducted by telephone based on structured questionnaire.
- Study to be supplemented with parallel studies among other audiences that can also be directly or indirectly influential in the buying decision for D&T services. These can include key business media, firm alumni, particularly those in corporate positions and key government administrators.
- Current employees are also an essential communications conduit in establishing the image of the firm. To understand their role in the effort, we also recommend adding supplemental questions added to pending employee research to offer key comparative data between this audience and external groups that are critical to establishing the image of D&T

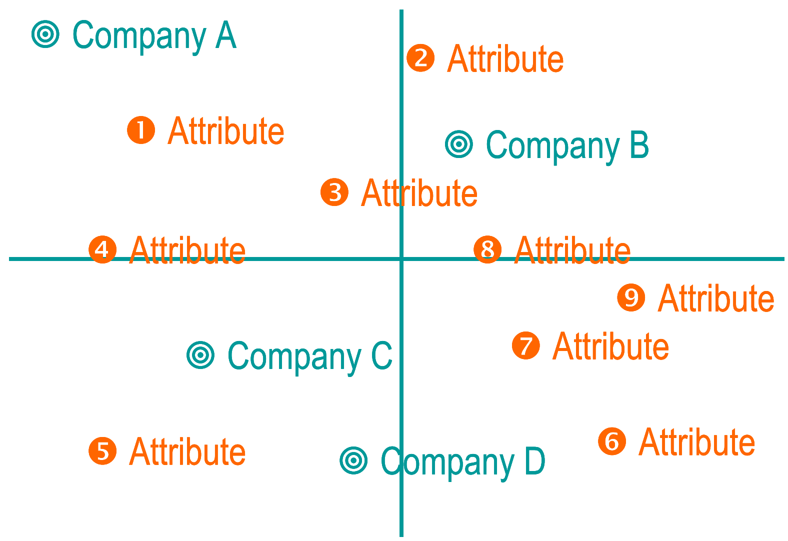
Service Lines & Industry Groups

- In addition to measuring national image, it is also essential to measure the delivery of key messages to the media that will in turn be delivered to D&T target audiences. We recommend that this analysis be done by individual service lines and industry groups *(ERS, Ebiz, A&A)* in order to provide feedback on the media relations efforts of these lines and groups and how they contribute to the national corporate image program
- This analysis will be conducted using N.O.V.A. or "News Overview Value Assessment". N.O.V.A is an NAME OF PR AGENCY proprietary content analysis system that measures the placement of client originated and intended messages in the media. The N.O.V.A system also measures tonality of the messages *(positive, neutral or negative)* frequency of mention of these messages and specific placement
- The key benefit of N.O.V.A. is its ability to provide a diagnostic assessment of media relations efforts in order to both measure performance as well as improve media relations performance
- We anticipate conducting this analysis for several different industry groups and service lines at D&T. Each report will examine corporate messages as well as messages specifically intended for each operating unit

Presentation of Findings — National Corporate Image

- Findings presented in three basic formats:
  - "Reputation Index" that compares each of the "Big Five" on a "zero to 100" scale. This provides a basic score that will serve as a benchmark measurement
  - Perceptual map that indicates the relative positioning of each of the "Big Five" as well as identify those strengths most associated with each firm
  - Detailed report that examines the relationship between communications activities and changes in perception

The following is an example of the perceptual map that demonstrates the relative position of each firm and the relationship of each firm to core attributes.


Company A
❷ Attribute
❶ Attribute
Company B
❸ Attribute
❹ Attribute
❽ Attribute
❾ Attribute
Company C
❼ Attribute
❺ Attribute
Company D
❻ Attribute

Section VI

Service Line Program Summaries

AUDIT

Project Objectives:

Build Awareness:

- Stake a leadership position for SAMPLE COMPANY Audit in the marketplace
- Distinguish SAMPLE COMPANY Audit from its competitors
- Build awareness of SAMPLE COMPANY Audit's unique auditing methodology
- Reinforce SAMPLE COMPANY Audit's business model to demonstrate the benefits of a full-service offering
- Leverage SAMPLE COMPANY's superior talent pool

Support Brand Equity:

- Establish SAMPLE COMPANY Audit as the "Best Audit" in the profession
- Advocate SAMPLE COMPANY Audit to potential clients to achieve greater market-share

Activities to Date:

Project: Promotion of SAMPLE COMPANY's Questions at Stockholder's Meetings 2016. The project included the following key program elements:

- Message Development
- Presentation and Media Training
- Materials Development
- Media Relations: Resulting in over 84,000,000 impressions to include the following media placements: Money magazine's April issue; CNBC Powerlunch - Robert Uhl interview 2/9/01; CBS Marketwatch.com – article appeared 2/1/01; Financial Executive issue to be determined; and additional coverage is pending

Status:

National Public Relations Plan prepared for the Audit Group was submitted on February 6, 2016 and is pending approval.

E-BUSINESS SERVICES GROUP

Project Objectives:

Develop and execute a national brand and eminence-building program for D&T's e-Business Services Group, beginning with a focus on the B2B marketplace.

Activities to Date:

- Submitted Q1/Q2 National PR Plan for e-Business Services
- Submitted a "jump start" program
- Signed interim letter of agreement for "jump start" activities, January 24, 2016
- Submitted a three-month budget and timeline of activities
- Conducted a Communications Workshop

Status:

National Public Relations Plan prepared for e-Business Services Group was submitted on January 23, 2016 and is pending approval.

ENTERPRISE RISK SERVICES (ERS)

Project Objectives:

- Assert the Enterprise Risk Services practice as a critical and leading player in an increasingly online business world
- Create a singular, global image of the Enterprise Risk Services practice as the leading provider of risk management solutions
- Position ERS, and, specifically, the Secure e-Business Technology Center, at the forefront of privacy and security solutions
- Consistently and proactively communicate the Enterprise Risk Services brand internally and externally

Status:

National Public Relations Plan prepared for Enterprise Risk Services was submitted on January 29, 2016 and is pending approval.

FINANCIAL SERVICES INDUSTRY (FSI)

Status:

Laura Breslaw and NAME OF PR AGENCY will meet on March 2, 2016 to initiate plan development.

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