# **Official Proposal for Wendy Isley**

# **October 17, 2016**

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Prepared for:

Wendy Isley and Liberty Hypnosis

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# **What We Loved About Wendy of Liberty Hypnosis**

The first time I met Wendy, I knew she was a force of nature. I’m not sure she knew fully yet what was to come, and I don’t mean to imply I had any idea what form it would take. I simply mean that there are some things I know for certain. Very few things! But there are some. One of the things I know for certain is that Wendy shines with a bright light. It’s the kind of light that comes from genuine compassion. The kind of compassion that some people lose when things get too hard, or the world treats them with too much cruelty.

Other people face their obstacles with courage and conviction, and develop a commitment to make the world a better place for others. Wendy realizes that it’s your heart that shows people who you are, and everywhere she goes she shares her heart with the world. When I met Wendy she was already a talent healer. As we end this part of our journey, Wendy is a true spiritual teacher with the power to help others unlock their potential to shine with the same light she seems to exude effortlessly.

It isn’t effortless of course. It’s the kind of light that one find when they’ve searched long enough, and realized the answer to life’s big question isn’t something that can be grasped or touched, nor is it something that anyone else can give to them. Because we already have it. Love isn’t something we have to find, it’s something that is always with us.

One single spark taught the world about fire and changed the course of history. Wendy sparks the soul’s of the people she meets everywhere she goes, including mine. I will never forget the power contained in this unlikely crusader, and I will always be grateful she let me into her business and life;I consider myself a stronger leader because of my experience with Wendy.

A spark needs oxygen to grow into a flame and continue to burn brightly. Wendy also needs oxygen in the form of systems and structures that provide a container to be able to take her work to the next level. That’s why we’re grateful Wendy has been such a dedicated student because she is qualified, ready, and we believe the time is now for her to bring her work to the world.

Look around. What do our hearts cry out for more than a tiny spark of genuine hope?

Wendy, through her business, has the potential to answer their call and activate the next generation of spiritual leaders. Wendy may be an unlikely crusader….still…

We can’t think of anyone better to crusade for the power of transformation and spiritual growth than Wendy Islely. Unlikely or not, the world called you, and you courageously answered. .

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# **Strategic Narrative Direction for Catalyst KC (Liberty Hypnosis)**

*Are you an ember?*

*Or are you a flame.*

*David Norris*

There are two themes we think (including the above narrative) will best serve this business. The imagery of light in the form of a catalyst, a spark, a flame, and the story of the “Unlikely Crusader.”

The foundation is Wendy as a Catalyst, invoking images of a flame or a spark. Water cascades and the flame continues to burn. No matter what happens, there is always that crack of light. That’s truly what Wendy is: a powerful ball of light.

This business isn’t transformational in the same way all the others claim to be. Wendy is the bringer of light. She is the one who goes to the cavemen and teaches them about fire. She is the powerful wise lady who stops in and shares her wisdom; those that learn from her continue the teaching down the line.

With all that goes on in the world, many people need touchstones to keep them connected to what they believe in and to themselves. Some people go to church for this purpose as it can serve as a booster. In the same way, Wendy is the booster.

This theme links up to Wendy and theme of the unlikely crusader. In olden times she would’ve been called a witch. She appears ‘normal’ while having amazing powers. She can pass on her gifts easily and easier than many others because she meets people where they are. She allows them to be where they are. They feel welcome to join the crusade in their own way.

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# **Targeted Innovations: Comparing Approaches**

Below is a list of specific innovations that we see as key areas to focus on moving forward. The key innovations we see are within the Business Model and Marketing. See below for details.

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|  | **Current Approach** | **Graveyard’s Innovations** |
| **Business Model** | Standard hypnosis + coaching business with all the leverage problems and difficulties differentiating Liberty Hypnosis and Wendy from other similar enterprises. | Integrated workshop model incorporating a leveraged hypnosis business with additional practitioners, a Sunday spiritual service with key kick-off events throughout KC featuring Wendy, and a series of workshops and classes leading ultimately to the launch of a contemporary and accessible spirituality “school.” Plus additional programs sold online or to corporate, like the Stop Smoking Program, to generate additional revenue. |
| **Offerings** | 3 session hypnosis package $295  Healthy Weight 3 month program $750  4 month HypnoCoaching Transformation Program $750 | The core offerings of Catalyst must accentuate Wendy’s strengths which include teaching and facilitating experiences that spark rapid positive change. They must also be familiar enough for people to be willing to try them and not seem too odd or cultish, while at the same time differentiating Catalyst’s programs from current approaches that destruct trust.   1. Spark on Sunday: think Oprah’s Super Soul Sunday for the more serious (read: modern day) seeker. The woman or man who doesn’t yet know that they too are an unlikely crusader. If only someone or something would light their divine wick. 2. Hypnosis Practice: This should be, in part, given to another practitioner. This will allow Wendy to bring in more clients + mentor another certified hypnotist. It will also mean she can take a vacation, focus on her family, and get necessary structures in order. Since she’s maxed out on time to money ratio this allows her to free up time and bring in more money while delegating responsibility ensuring she can step away when necessary. 3. Series of Workshops & Classes: This serves as a lead generator, press magnet, platform builder, and testing ground for the next big innovation whether it’s a metaphysical and spiritual school that makes sense for the modern seeker. Or something much bigger like the next Hay House. Note: we won’t call it Wendy House. 4. Coaching: It is unclear where this fits in the model because we need to see the amount of time it takes to plan, market, and execute the other parts of this model. *However, it is the fastest path to cash. We recommend a “quick cash” plan to inject 5-10K in revenue into the business in the next 60 days.* See “Quick Cash Plan.” |
| **Customer Experience** | Customers currently benefit from Wendy’s loving and caring approach. Wendy is pure light and people are drawn to her. However, the lack of systems and a consistent customer experience inhibits further growth and leaves revenue on the table. No clear experience of Wendy’s business, instead they have a clear experience of Wendy, which is bound to be draining and exhausting some days. | Develop as we go. It’s critical that we write down, formalize, and put in a master manual the customer experience. What are the values this business is trying to represent and instill in its customers.  Graveyard Innovation will provide a basic framework for the customer experience that includes training on how to craft an effective customer experience. They will also provide training on “Internal Sales Funnels” a concept no one really talks about.  Graveyard Innovation can help as requested to craft this experience. The important thing is that we listen. We learn. And we integrate customer feedback with the values of Catalyst.  Janet Tingwald can also be made available for in depth brand assessment, which can help with making sure the customer experience is aligned to the brand, the mission, and the actual customers and the need they are trying to fill. |
| **Brand** | Current branding is indistinguishable from other hypnosis and hypnotherapy businesses. It also leaves Liberty Hypnosis and Wendy open to caricature, misunderstanding, and guilt by association. Bad press for hypnosis is bad press for Wendy - there’s no reason we need this exposure.  Current branding is more BNI and boring business than beautiful. | Light. Fire. Spark. Excitement. How does an ordinary woman from the suburbs find her way to a world that changes her life in amazing ways? Something was sparked in Wendy Isley and now she’s committing her life to sparking something in others. Imagine if we’d listened to Joan of Arc?  See strategic narrative direction. |
| **Advertising** | Website. No other paid advertising campaigns. | We recommend investing $500-$2500 on paid advertising in specific to Kansas City publications. We recommend avoiding PPC ads at the moment and instead using local rags like “The Pitch” to generate excitement and enthusiasm. We can tie these print ads together with an interactive video and/or web campaign that sparks interest and merges the online and the offline to create a powerful pull to Wendy’s work.  If there is concern about investing this money see “Quick Cash Plan.”  Investing in this way doesn’t only serve the purpose of getting people to attend. It may or may not help with that. What it does it provide a level of seriousness as we approach partners, leaders, business owners, and other community members. It also allows us to use our creative department (read: Andrew’s Illustrations) to showcase the best of Catalyst. These ads will stand far above 99.9% of the other ads in these magazines.  It’s also helpful to give something first, and through purchasing some ads in some locally targeted papers it will give us more leverage to approach these publications later and ask them to promote and/or partner with Liberty Hypnosis and/or Catalyst.  GYI will work to negotiate the lowest rate and keep research on anything relevant we discovered.  Wendy should also work her connections. Everyone she met at BNI can come + bring a friend or family member. She’s been a part of numerous organizations and they might be willing to support it. |
| **Marketing** | Networking. Speaking gigs. School of Metaphysics. Lack of clear positioning. Lack of consistent strategy. Tactics are draining because they aren’t coherent and because the narrative lacks coherence. | Implement a consistent marketing plan that makes use of Wendy’s strengths.  Specific innovation we recommend in marketing is the “Spark Sunday” series which we recommend rolling out at key Kansas City (both KS & MO) locations. These locations serve as a focal point for engaging press, community leaders, business owners, networking groups, activists and politicians, children and schools, and charities. We can position this as a woman who is deeply motivated and inspired to give generously and make the world a better place. You know what it’s hard to say no to? Someone who is willing to help simply because they see a need. Seats will be filled. This can be leveraged into the next opportunity.  This means we need to create a CRM to track the partner and potential partner contacts.  It also means we need a very specific ***“Next Generation Email Engagement”*** strategy that makes use of the Graveyard Innovation Trust Framework to avoid feeling spammy.  The additional benefit of doing the Sunday program is it will provide all the content we need for the website, blogs, articles, ads, and other promotions moving forward. Therefore, we should make sure that it is recorded in high quality. Uploaded quickly. Audio unattached so it can be used separately. Photos should be taken every time. And Graveyard Innovation should conduct regular surveys and customer research on the attendees.  GYI should also handle negotiations and logistics so Wendy is shielded, in the eyes of the community, from any potential problems or from individuals mischaracterizing her work.  The above represent some initial thoughts and notes. The bigger issue is implementing a 12 month marketing strategy that takes into account the major changes that need to happen with the structure of the business. We believe that a “Next Generation Ad” campaign should be launched sometime next year and there is the potential for a book and other additional products.  Sponsorships and advertisers (when/if the time is right) also provide a necessary source of added revenue + help guarantee consistent attendance. |
| **Media** | Some videos on website, although they lack consistent purpose and message, and are diminished substantially by the other content (ex: other videos that aren’t Wendy) that’s provided. It’s hard to make sense of why. | Huge opportunity here both because Wendy is a community leader, a volunteer, a mother, and a spiritual teacher. This allows us to hit many markets including PTAs (of which Wendy was a part) to powerhouse companies. See the media assessment for more details. Basic idea is that Wendy is a hidden gem and unless you know her power, the power to catalyze, she’s just another mom with too much to do and not enough time.  Wendy must stay on message and avoid becoming the “hypnosis” lady on the news. If Stop Smoking needs discussed consider a spokesperson or additional hypnotist at Wendy’s practice. There’s already so much mixed and confusing messaging when you Google Wendy or Liberty Hypnosis and once we correct this we need to stay ruthlessly aligned to it or it won’t work. |

# **Catalyst (Liberty Hypnosis) Customer Profile**

More research is needed into the specific customers that will be targeted. We believe that with the overly niched approach self-help and personal growth has taken there is an opportunity to deepen the spiritual conversation through bringing people together instead of telling them the answer to their problems is to further divide.

*Example: Donald Trump used a niched marketing strategy to secure the Republican nomination; however it reinforced angry divisions at a time when the world needs something different. Bernie Sanders and Ted Cruz also used this approach and it proved limited for them as well. On the flip side, Barack Obama began with a very clear niche, progressives and college students, and leveraged the same inspiration he used to appeal to that niche through group after group allowing him to put together the necessary delegates to secure the nomination, and later the necessary electoral votes to secure the presidency.*

Because the self-help movement has focused on a series of “fix-me-please niches” like weight, relationships, money, health, and spiritual advancement we believe there is a hunger for de-segmented approaches. This belief will be tested during Phase #2.

Here is what we know so far about the type of client Wendy works with:

* Many of them struggle with addiction, forgiveness, and trust issues
* She has mainly worked with women, although her mission in this business clearly extends beyond women only
* As a nurturer, she tends to attract nurturers who struggle with compassion fatigue
* Humor is a powerful transformational tool for her clients and Wendy’s deeply authentic smile, warm laughter, and open heart allow her to bring this out of clients in a meaningful way.
* The metaphysical shift these women are seeking is how to go from “closed” to “open.”

We believe the message, branding, and the “unlikely crusader” story is more important than a well-defined niche in the beginning. A niching strategy would also be antithetical to the mission of making wisdom accessible and Wendy’s deep belief that within each of us lies the potential for great light. ***Where other people tell you to focus on your specific problems, at Spark Sunday, we simply open our hearts and our arms because you are not a problem, you are a force of transformation waiting to be ignited.***

**Recommended Administrative Assistance for Catalyst**

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| **General Admin**  X Handling email inquiries  X Returning phone calls  X Receptionist responsibilities  X Sending thank-you cards  X Travel arrangements  X General research / info gathering  X Transcription  X Weekly reports  X Database building and management  X Calendar management  Finding other contract workers  X Project management  X Invoicing  X General accounting | **Technical Support**    X Building powerpoints  X Blog post assistance  X Basic web updates  X Autoresponders / Email management  Scheduling webinars  Teleseminar management  X Social media help  X File management |
| **Customer Service**  X Answering client emails  X Client reschedules  Technical help for clients  X Follow-up from strategy sessions  Replying to comments on blog and social media  X Client surveys / check-in calls | **Personal Tasks**  Hotel / Flight / Travel  X Buying personal gifts  X Bill paying  Grocery delivery |

**Messaging for Wendy Isley During the Initial Rollout of Catalyst**

**Objective:** to provide clear and concise messaging that begins to raise brand comprehension and brand excitement in a way that boxes out the competition by allowing Catalyst to be a supplement to other transformational businesses. In other words, Catalyst becomes a container and a creator for contemporary seekers. Those who are embers glowing brighter by the moment, and those flames who are already burning with glowing radiance.

**Overview**

* These talking points are the ones we recommend for the initial rollout of Catalyst.
* It is essential to establish Catalyst as a brand and a business not merely an extension of Wendy herself.
* Critical to ***stick, even if loosely,*** to these talking points because otherwise messaging and brand will be ignored as confusion sets in.
* Theses talking points allow for flexibility, but in exercising message discipline Catalyst can be laser focused on attracting its initial core base of ignitors who will go out into the world and share their individuality and love with others.
* We recommend 4-6 months of reinforcing these themes (with testing and refinement along the way)

**Talking Points**

So the high level concept right now is that spiritual people from practitioners to you know people that are just interested to.

1. There are more people than ever seeking spiritual development and personal growth but we have a crisis at every level. In our hearts, our minds, and in our world. That’s because we’ve become isolated when we should be reaching out our hands. Catalyst is one tiny spark working to connect us to our shared interests rather than our selfish fears.
   1. From spiritual gurus to casual seekers to professional practitioners many people are interested in personal growth and development.
   2. However they’ve become spiritually siloed and isolated because of technology, an increasingly asymmetric society, and a general sense of fear and uncertainty has caused us become isolated. Look no further than people who call Facebook groups - community.
   3. Instead of growth and open hearted collaboration to solve the ***really, really big problems facing our world*** competition and consumerism have taken over. Catalyst replaces the cult of competition and consumerism with compassion, cooperation, and open communication.
2. When we deal with issues separately it creates shame, which creates a chasm between us at a moment in time every person knows we should be coming together.
   1. What is the root of the spiritual sickness underneath all of this? Our fragmented approach. We look at ourselves as a series of problems to be solved which causes guilt when our life isn’t completely wonderful after five minutes. Then we look around and we believe the lie that everyone’s life is perfect because HEY THEIR INSTAGRAM SAYS SO.
   2. We’re now guilty - because, “I couldn’t fix myself, which must mean I didn’t try hard enough.” And ashamed because, “Everyone else deals with their life so well.”

3. People are not problems to be solved. They are the most powerful energy source in the entire universe. Because a single person, in a single moment, who chooses to dig deep and find even a single spark of hope can change the entire course of human history.

* 1. Each one of us is walking around with that potential inside of us. Catalyst was built to bring that message to the world, that you don’t have to find your light, you are the light.
  2. There are enough people blaming, prescribing, and explaining. At Catalyst - we do something different - we embrace the right, the illuminating presence, that has always been with you, and can never be taken away.
  3. We reinforce this in our work, in particular, through our commitment to building trust by working with qualified teachers, practitioners, coaches, and leaders. This replaces the culture of amateurism that reduces spiritual wisdom to boring cliches and platitudes. The teachers have a sacred responsibility to continuing to learn, practicing the highest ethical standard, and meeting students where they are with no agenda about where they need to be.

We have a culture of openness around this open learning, debate, dialogue and discussion that creates an environment for even the smallest of sparks to become a roaring flame.

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# **Media Assessment**

\*\*Please note, this assessment guideline gives you an overview of Graveyard Innovation’s approach; however, these steps are adapted based on your company’s specific needs and contract.

**Overview**

A media assessment report assists clients and the Graveyard Innovation team (GYI) in identifying potential areas of strength and weakness in company branding. In turn, GYI establishes recommended media placement, including timelines and techniques to effectively integrate client branding into recommended media. In this overview, GYI outlines general processes that assist in effective media placement identification.

**Assessment Breakdown**

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| --- | --- | --- | --- |
| **Media** | **Benefits** | **Difficulties** | **Y/N** |
| Traditional Print: Newspaper | Allows longer interview, establish media relations, allows geographically specific content, established distribution | Specific deadlines  Distribution reductions | Y |
| Traditional Print: Magazines | Allows longer interviews, establish media relations, company graphics are oftentimes highlighted, deadline flexibility, established distribution | Audience relevance, distribution reach | Y |
| Traditional Television | Sound/Visually appealing, established placement/distribution, short snapshot branding | Cost, audience relevance contingent on televised location, reduced results | Y (w/ media training) |
| Online Print, excluding blogs | Flexible formats and deadlines, aesthetic flexibility, re-share features, established distribution | Identifying worthwhile lists, cross-promotion may be required | Y |
| Online Print: Blogs | Flexible formats and deadlines, aesthetic flexibility, re-share features, linked to website | Distribution/must establish list, saturated market | Y |
| Online Video: YouTube | No ads required, visual/sound flexibility, re-share feature, increase channel subscribers, interviews | No print/textual,  distribution/must establish list | Y (as part of the Spark Service to begin with) |

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# **Quick Cash Plan**

# Go to BNI partners and ask for referrals

* Ask everyone else you know for referrals
* We recommend a goal of 7-10 conversations per week.
* Go to all your contacts and offer your coaching packages
* Sell a VIP day $750 - one day of spiritual growth will help you do what would normally take 3 months!
* Special offering of hypnotherapy. As you are bringing on a new practitioner, you can offer clients a package now (to be used now or in the future).
* Set a goal for how much you need, and focus exclusively on generating it. Then use that income to leverage your business to the next level.

The chart below or something similar, can be used to drive and keep track of a coaching campaign.

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| --- | --- | --- | --- | --- | --- |
| **Date Appt. Booked** | **Client Name** | **Amount** | **Pitched Coaching (Y/N)** | **Lead Generated** | **On Email List (Y/N)** |
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# **Our Recommended Innovations**

### Finding #1: Business model and revenue structure development, testing, and refinement

We want to strongly differentiate Wendy from similar enterprises and we do this by expanding on the business model, which is currently set up as a standard hypnosis + coaching business.

### We propose an integrated workshop model and additional services as described above. Also, additional programs can be sold online or to corporate, like the Stop Smoking Program, to generate additional revenue.

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### Finding #2: System implementation and organization is hampering Liberty Hypnosis from the growth it could be experiencing and causing revenue to roller coaster month-to-month.

### Our biggest concern is implementation. There is no question that Wendy is a phenomenal teacher. There is no question she has amazing things to teach. There is no question she can sell. There is no question she can market effectively. The question is whether or not the right structure is in place to go beyond where she is, because those activities take incredible energy without the right systems.

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### From putting in place a Customer Relationship Management System (we use HubSpot CRM - which is free) to strong partnership and referral programs, to managing a media presence (yes there should be a presence) are not only essential to financial success but creating a business that support Wendy’s lifestyle and values.

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### To assist we’re happy to offer our “execution” (virtual assistant) services for $10/hour up to 10 hours and $12/hour after that. We do not think Wendy should need more than 10 hours a month at this time, and we estimate around 5-7.

### Finding #3:. Key changes and revisions in core offerings

Offerings will be added and changed in order to bring out Wendy’s strengths and facilitate experiences that spark rapid positive change. These are outlined in above with emphasis on: Spark on Sunday, bringing on additional hypnotherapy practitioner, additional workshops & classes. Too much energy is being leaked by people who want access to Wendy but aren’t compensating her fairly.

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### Finding #4: Fully create and embody the Catalyst brand and approach highlighting Wendy’s “light” and fierce dedication to love

This involves ongoing brand development, messaging, and narrative cohesion focused on the Wendy as a catalyst - as that flame that allows others to find their footing and move forward in positive change- as well as a sharper customer focus with nuance and specificity built in.

### Finding #4: Establish a strong customer experience

Money is being left on the table because the customer experience doesn’t reflect Wendy’s strengths as strong as it can. We will formalize and document a master manual of the customer experience through a process of listening, learning & integrating customer feedback with the values of Catalyst. This will strengthen Catalyst as a brand and further differentiate Wendy as an expert in her field.

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### Finding #5: Transform boring business branding that is undifferentiated from other coaches, personal growth teachers, and hypnotists to powerful Catalyst branding that highlights her unique life experience as an “Unlikely Crusader” for the spiritual seekers of the world.

### Distinguish Wendy from other hypnosis and hypnotherapy businesses by developing the Catalyst brand, using the images of light, spark, fire, as well as Wendy’s image and voice in the form of video ads that share her unique fire with the world.

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### Finding #6: As the brand develops we advise investing in a print advertising campaign to raise the profile of the business, garner local attention, court partners, and test effective messaging.

Local is HUGE because everyone is ignoring it and running online. We can build a presence online, but in the meantime let’s corner the marketing in Kansas City. We recommend a targeted paid advertising campaign specific to Kansas City publications in order to establish a level of seriousness as we approach partners, leaders, business owners, and other community members.

### Finding #7: Create and implement a Catalyst-specific marketing plan

Establish clear positioning and marketing plan that reflect the values of Wendy and of Catalyst. For example, “Spark Sunday” series, “Next Generation Email Engagement” strategy. This includes a full year long marketing plan.

### Finding #8: Partnership Opportunity Tracking & Implementation

Wendy is so likeable and lovable! It only makes sense to attract partners. Wendy can already compose a list of people she’d like to partner with. It’s imperative to track your efforts here just like with customers. Create and implement a CRM system to track partner and potential partner contacts.

### Finding #9: Establish Solid Media Presence

Use Wendy’s roles of community leader, volunteer, mother and spiritual teacher to showcase her power to catalyze others in their spiritual growth. We recommend podcasts, local radio, and print to start, while doing some basic media training. Within 3-5 months we think TV is a viable option.

# Offer for Wendy Isley & Liberty Hypnosis to Participate in our Strategic Storytelling Process

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If you choose to move to Phase 2, the next three months will focus on laying the foundation and building the elements necessary to tell the story of this proposal in the world. Here’s where we begin building, testing, and executing the strategy outlined above with the goal of:

1. Testing the viability of the innovations recommended
2. Establishing a baseline for results usually metrics such as profit, traffic, speaking gigs, etc.
3. Creating the structure for the business to implement the targeted innovations we believe will most likely drive results.

Our goal is to create a cohesive brand that resonates with clients, partners, and media professionals that leverages a unified digital presence where each asset is working off the same strategy and drawing on its strength to achieve the brand’s growth objectives.

Once you’ve made the decision to move forward to Phase 2 (see specific steps in the What Happens Next section below), a project plan will be created based on the specific innovations outlined above.

Normal pricing: $1,000/month

Your price: $550/month

During month three the Graveyard team will conduct a brief review with you during which we’ll ask you for your feedback on our performance, present to you additional findings and research, and answer any questions. Also, at that time we’ll make any additional recommendations for ongoing work or services that may assist you in continued success.

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# **What Happens Next**

You decide if we are the right people to stand up for your interests, your business, and your vision. If you choose to move forward with Graveyard Innovation, the next step is for Agreements & Records to generate a customized agreement to retain services. To start that process we simply ask for the first month’s retainer, which functions as a deposit, refundable minus a $100 processing fee anytime before the official contract is signed.

This agreement outlines the scope of the work, makes sure you are clear on all details, gives you the exact process to add, modify, or remove services (things change we get it), and makes sure there is zero misunderstanding. Your strategist will make sure you get this agreement promptly and is available to go over it or answer any questions.

***If you would like us to begin work immediately****, and don’t want to wait for the agreement, let your strategist know and they will send you an interim agreement that allows us to begin working on your behalf immediately while we wait for the entire agreement to be drawn up.*