



thinkLAW

STRATEGIC IMPLEMENTATION PLAN.

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This document is a result of the strategic partnership between thinkLAW and SchermCo. The following encompasses the main findings of the thinkLAW operations project. ➔

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A LETTER TO THE TEAM

Colin,

It has been a pleasure working with you and the thinkLAW team.

We wanted to package the deliverables we created throughout our partnership and leave you with additional thoughts.

Please find the final deliverable for the thinkLAW Operations Project attached. You'll notice an overview of our project as well as a clean version of the Strategic Implementation Plan. The Strategic Implementation Plan is the document we originally submitted to you on March 2, 2018, prior to the conferences. We hope you'll find these documents valuable as you reflect on the partnership, the wins, and the systems that can be utilized moving forward.

Our team is excited to see thinkLAW reach their goals in 2018 with these improved systems. We look forward to partnering again in the near future.

Onward,

Greg, Sabrina, Lori, and Ana
SchermCo

01. OVERVIEW

SchermCo and thinkLAW partnered from February 5th, 2018 to April 27th, 2018 to evaluate thinkLAW's current operations, systems, and structures in an effort for thinkLAW to hit their ambitious goal of earning \$450,000 in revenue in the first half of 2018. Additionally, SchermCo was asked to also identify and support the removal of barriers that were impeding thinkLAW's ability to implement strong systems.

PROCESS

Throughout this partnership, SchermCo conducted multiple staff interviews and held 15+ calls with thinkLAW staff members. This also includes biweekly check-ins with Colin Seale. The intent of these calls was to gather the necessary information from thinkLAW staff members to truly learn about any current systems that were in place and those that needed to be improved or removed. During that time, our team also reviewed key internal documents and evaluated the landscape in which thinkLAW was operating in order to provide focus and strategic support to meet their goals.

After the internal discovery phase, it became clear that many key systems and processes were being bottlenecked at a specific position within thinkLAW. Colin decided to make a few personnel decisions in order to streamline operations and systems to ensure the success of thinkLAW.

Colin and Holly Maria then began to prepare for two major conferences in late March. The SchermCo team, with approval from Colin, prepared the Strategic Implementation Plan. This plan centered on key systems that would need to be implemented for the conferences to be successful. Additionally, SchermCo also encouraged thinkLAW to narrow their focus in operations to prioritize renewals, have a smaller geographic focus, and consider how to best leverage appearances and follow-up from conferences.

This plan included:

- Four key recommendations
- A 90-day implementation plan with metrics and related benchmarks
- A conference checklist that included Timing, Tasks, and Owners
- 8 long-term considerations

The Strategic Implementation Plan was submitted prior to the two aforementioned conferences in order for the suggested systems and processes to be tested. Both Colin and Holly Maria communicated that the plan was helpful in preparing, during, and after the conferences.

SchermCo also built an online tracking tool to measure progress toward benchmarks that will lead to meeting the \$450,000 revenue goal. Through the editing process, SchermCo and thinkLAW landed on a set of metrics that are most likely to lead staff to spend their time on high leverage strategies and successfully close both new and repeat business deals. These metrics include sales leads identified, renewal and new sales meetings set, renewal and new sales committed, quotes for sales sent, approved, denied, and paid. As of April 16, 2018, 33 renewal meetings have been scheduled and 35 new sales meetings were scheduled. The table below shows progress toward the financial metrics.

<i>Line Item</i>	<i>Goal</i>	<i>Current</i>	<i>% of Goal</i>
Total Sales Leads \$ Identified		\$1,207,800.25	
Approved		\$15,525.00	
Waiting for approval (\$)		\$210,083.75	
Denied		\$2,827.50	
Drafting Invoice		\$69,575.00	
Needs Analysis		\$60,750.96	
Approved, not paid (\$)		\$60,750.00	
No Meeting Yet		\$87,750.00	
Total Revenue	\$450,000.00	\$55,324.96	12.29%

Lastly, SchermCo held additional strategy conversations with Sarah Pfeiler & Quandra Adams of thinkLAW. These conversations were held at the request of Colin and in an effort to further support data-based systems for each of their respective roles. Greg Schermbeck, of SchermCo, leveraged these calls with Sarah and Quandra to learn more about the systems that were in place and suggest strategic changes that would allow them to make deeper progress towards their goal of \$450,000 in revenue in 2018. The suggested tweaks and systems were documented via email and sent to Colin.

WINS

Although this partnership took place over the course of three months, we believe significant wins and recommendations were captured. A few of these wins include:

- thinkLAW currently has \$55,000+ in Total Revenue
- thinkLAW is awaiting approval for \$210,000+ of invoices
- A tailored Action Tracker was created to monitor key metrics related to overall revenue
- New systems were created related to:
 - Renewing Clients
 - Acquiring New Clients
 - Conference Strategies
- Clear plans and strategies were created for thinkLAW staff

It should be noted that while the initial scope of this project was to improve key systems of thinkLAW, both parties agreed to partially shift the focus to organizational strategy and systems that have more of a focus on total revenue.

ADDITIONAL RECOMMENDATIONS

While thinkLAW has a large number of goals in place for all their employees, many of the goals, specifically around social media sales, are tough to track and therefore it is difficult to assess their efficacy in reaching the bottom line goal of new sales. SchermCo encourages thinkLAW to reevaluate the use of those metrics, instead focusing staff capacity on the primary goal of financial stability. Once the initial sales goal is met and a sales pipeline is established, staff members can use their capacity to build a greater media presence, develop additional business via Requests for Proposals (RFPs), and create tracking systems in various technology platforms.

After meeting the initial goal, thinkLAW will need to turn its attention to long-term processes and systems. Chief among those assessments should be the alignment of the skill and will of staff members within their roles. The jump from contract to full time staff is large in terms of cost and thinkLAW should assess if that shift is financially viable and wise. While there are no hard and fast rules about which staffing model is better for an

organization, thinkLAW should compare sales in 2017 and expected sales in 2018 with overhead costs to determine if full time staff members are the right move for the organization at this time. Related, it may be discovered that current staff members may have the skillset to close deals and ultimately increase revenue for thinkLAW.

A clear and systematic new client onboarding process will benefit schools, teachers, and increase the communication between customers and the thinkLAW staff. This will better position thinkLAW for renewals. While thinkLAW has previously completed a market analysis of other supplemental curricular materials, it may be worth doing so again in order to ensure pricing remains competitive. After completing this step, thinkLAW should consider a multi-year bundle and discount for schools that want to pay their contract fees upfront, lengthening the sales cycle and relieving some of the short term pressure from sales. thinkLAW should also consider clearly tiered partnerships, some including professional development, ongoing support and a wider range of grade levels or materials which can be priced accordingly and should simplify the process of sending out quotes and proposals. The current market assessment may also show that thinkLAW could raise their prices, and in a tiered system this could lead to a much smaller number of sales required to meet annual revenue targets. This will allow thinkLAW to build a reserve of three to six months worth of expenses, payroll, and think about long-term strategic priorities in addition to short-term sales.

thinkLAW may also consider creating a Board of Advisors, likely composed of both educators and professionals in the legal community. This venture could broaden funding sources for thinkLAW, by allowing law firms to “sponsor” schools in their cities or states, and also gain valuable input from educators who are familiar with the product. The Advisors should function as a set of “critical friends” that can advise about the direction and priorities of thinkLAW.

As thinkLAW implements its short-term sales strategy and contemplates the best long term steps, it will be important that they continue to maintain focus on a narrow set of metrics and actions. This will allow them to assess the efficacy of their actions and work within the current capacity of their staff. Collecting and assessing data on what does and does not work for the company will best position them for long term growth and success. SchermCo will be available for a follow-up conversation to help assess priorities and progress.

02. STRATEGIC IMPLEMENTATION PLAN

The following information was presented to Colin on March 2nd, 2018 and after edits, was finalized and submitted on March 9th, 2018. The Strategic Implementation Plan includes:

- Short-Term Action Plan
- 90 Day Plan
- Recommended Actions
- Longer-Term Considerations

SHORT-TERM ACTION PLAN

Action	Deadline	Owner	Success Metrics
1. Renewal Strategy	March 23, 2018	Sarah	Renew 15 current contracts - 38% of current clients by June 1, 2018. Benchmarks: 1. 35 renewal meetings scheduled by 3/23 2. 10 renewals committed by 4/27
2. New Sales Strategy	April 13, 2018	Colin	75 new sales by June 1, 2018; 300 new high-quality leads that lead to a 1 in 4 hit rate Benchmarks: <ul style="list-style-type: none">• 300 leads identified by 3/30• 50 new sales committed by 4/27
3. Conference Strategy	March 16, 2018	Colin/Holly Maria	More specifics about conference preparation are below. <ul style="list-style-type: none">• Each conference should result in 40 opportunities to follow up with potential clients (scheduled within 2 weeks of last day of conference)• Each conference should yield 10 sales (sales closed within 45 days of last day of conference). Target is consistent with a goal of 1 in 4 meetings yielding a sale.
4. Operations	Ongoing	Colin	Operational tasks are managed in the day to day with no disruption to current work. Colin has identified 3 weekly goals for Sarah, Holly Maria, and himself that relate to operations

03. 90 DAY PLAN

with metrics and benchmarks

Date	Renewals	New Sales	Deliverables/Other
Week of 3/12	<ul style="list-style-type: none"> 20 renewal meetings scheduled 		<ul style="list-style-type: none"> Ideal client profiles complete Conference strategy complete
Week of 3/19	<ul style="list-style-type: none"> 35 renewal meetings scheduled 	<ul style="list-style-type: none"> 150 new leads identified 	
Week of 3/26		<ul style="list-style-type: none"> 300 new leads identified 50 meetings scheduled 	<ul style="list-style-type: none"> Revisit staff time and responsibilities
Week of 4/2		<ul style="list-style-type: none"> 20 follow-up meetings scheduled from each conference 	
Week of 4/9		<ul style="list-style-type: none"> 150 meetings scheduled 	
Week of 4/16	<ul style="list-style-type: none"> 40 follow-up meetings scheduled from each conference 		<ul style="list-style-type: none"> Revisit staff time and responsibilities
Week of 4/23	<ul style="list-style-type: none"> 10 renewals confirmed 	<ul style="list-style-type: none"> 250 meetings scheduled 30 new sales committed 	
Week of 4/30		<ul style="list-style-type: none"> 5 new sales from each conference committed 	<ul style="list-style-type: none"> Revisit staff time and responsibilities
Week of 5/7		<ul style="list-style-type: none"> 50 new sales committed 300 meetings scheduled 	<ul style="list-style-type: none"> Begin building new client onboarding process
Week of 5/14		<ul style="list-style-type: none"> 10 new sales from each conference committed 	
Week of 5/21		<ul style="list-style-type: none"> 65 new sales committed 	<ul style="list-style-type: none"> Consider ongoing client engagement strategies
Week of 5/28		<ul style="list-style-type: none"> 70 new sales confirmed 	
Week of 6/4		<ul style="list-style-type: none"> 75 new sales committed 	

04. RECOMMENDED ACTIONS

This section includes recommended actions to support thinkLAW in achieving their goals in 2018. Each of the following actions includes a timeline, success metric, owner, and additional context to aid in the execution of each.

ACTION 1: CREATE A RENEWAL STRATEGY

Timeline: Two weeks (March 23, 2018)

Success Metric: Sarah rates all current clients red/yellow/green and meetings are scheduled with all green and yellow targets with an end goal of 15 renewals committed by June 1, 2018. This process should happen alongside the creation of an ideal user profile.

With an ambitious goal of a client roster that will include approximately 90 schools/organizations, it is vital for thinkLAW to retain a segment of their current clients - at the current time, the goal is 15 renewals or 38% of the client roster. This goal will be higher in subsequent years where there is a longer runway and more data with which to strategize. Renewals should be considered a high priority at this point in order to bring in enough cash to cover payroll and basic expenses in the next three months (approximately \$25,000/month)

This renewal strategy should be targeted at two segments: highly engaged users and potentially engaged users. A thorough review of the current client roster is required to rate each school. Characteristics of each group and specific action steps are detailed below. Also included below are potential characteristics of unengaged users to help identify users that should not be considered for renewals. The current client roster should be segmented by green: highly engaged and likely to renew, yellow: potentially engaged with work required to secure a renewal, and red: unengaged and therefore unlikely to renew.

Highly engaged users:

- Use the product with fidelity
- Have several teachers/staff within a building using the product
- Engage on social media platforms
- Reach out to thinkLAW and/or accept communication from thinkLAW
- Have already budgeted for thinkLAW in future years

Potentially engaged users:

- Have at least one teacher/staff within the building using the product
- Follow on social media platforms, though may not engage
- Need immediate intervention in order for them to build thinkLAW into the budget for future years

Unengaged users:

- No confirmation of any teachers using the product
- Unresponsive or no contact via phone or email within a three-week period
- No discussion current or future use of thinkLAW

ACTION 2: NEW SALES STRATEGY

Timeline: Four weeks (April 6, 2018)

Success Metric: Colin would identify 300 leads by 3/30 with an end goal of 75 new sales by June

A strategy for new sales includes three main components: a conference strategy (detailed below), a geographic focus, and a network approach. Seventy-five percent (30 of 40) current clients are in the states of Nevada, California, and Arizona. thinkLAW should build on this geographic region and continue to grow its presence in this area, with a goal of an additional 60 new sales within these three states. This will ensure that thinkLAW continues to have approximately 75% of their business in the California, Nevada and Arizona region.

thinkLAW should also focus its new sales on building relationships at networks in the charter sector. An increased focus on the charter sector will allow for sales in multiple buildings with only one primary contact and because charters are not subject to the same budget timing, could allow for thinkLAW to focus on sales at a different time in the year. Charters are also likely to have a high concentration of Teach For America alums and mission-aligned leaders that value the opportunity for low-income students to be exposed to rigorous materials. Included in this list of charters to target should be: Alliance College Ready Public Schools (CA), Aspire Public Schools (CA and TN), Camino Nuevo Charter Academy (CA), Citizens of the World (CA), Equitas Academy (CA), BASIS Charter Schools (AZ), High Tech High (CA), Rocketship Education (CA, TN, WI), Summit Public Schools (CA), Great Hearts Academies (AZ), Discovery Charter School (NV), Doral Academy (NV), and Somerset Academy (NV). These charter networks represent a large portion of the schools in this geographic area and are likely to be philosophically aligned to thinkLAW.

National networks should include: KIPP, Achievement First, Chicago International Charter Schools, Uncommon Schools, Mastery Charter Schools, Match Education, LEARN Charter School Network, Noble Network of Charter Schools, IDEA Public Schools, YES Prep, Uplift, and national Education Management Organizations should include K12 Education, Mosaica Education, National Heritage Academies, Responsive Ed, and the Leona Group.

thinkLAW will need to complete further research about each network and its vision and mission and a tailored pitch should be created for the 10-12 networks that are most aligned and have a significantly large reach.

At the current time, thinkLAW is spending a significant amount of capacity on the RFP process, which to date has not yielded a strong revenue stream. Additionally, the RFP process has not been focused on the states where the majority of their current clients are located. thinkLAW should consider whether capacity would be better spent creating pitches that are tailored to specific networks and districts, and creating collateral material for conferences.

ACTION 3: CREATE A DETAILED CONFERENCE STRATEGY AND LOGISTICS PLAN

Timeline: One week prior to conference start date

thinkLAW has an opportunity to further its work in one of its target states, California, through the California Charter School Association (CCSA) and the California Association for Bilingual Education (CABE) conferences. These two conferences should lead to many opportunities to get in front of teachers, administrators, and network leaders to help them understand the value of thinkLAW. It will be important to consider the audience of each conference and what information and collateral will be useful.

CCSA: this conference represents an opportunity to sell to the largest charter networks in the state of California. More than 1200 schools, serving over 600,000 students are invited to attend this conference annually. Charter school leaders will likely be interested in seeing a demo of the curriculum and will likely focus on the rigor of text and questioning that will support student learning and challenge.

CABE: thinkLAW needs to highlight the opportunity to provide rigorous materials with supports for language learners. Highlighting the current percentage of ELL students will be important and that percentage should be very high considering the states where thinkLAW is being used.

In order to best use staff capacity and minimize costs leading up to the conference, logistics and planning will have to be well organized and well executed. Generally, the following checklist should be utilized after registration and travel arrangements are made:

CONFERENCE CHECKLIST

TIMING	TASK	OWNER
2 weeks out	Research attendees and sales targets - prioritize their top 10 list of people to connect with and ensure they have a planned opportunity to meet with them and get contact info to follow-up	Colin/additional conference attendees
2 weeks out	Determine the general strategy (ELL supports, rigor and relevance, geographic location, etc.) to target and correlated data points to highlight	Colin
1.5 weeks out	Create demo materials and ensure curricular materials will be on display	Sarah
1 week out	Create collateral aligned to conference specific strategy	Quandra
5 days out	Print and mail conference materials	Colin/Holly Maria (each prep for their own conference)
3 days out	Practice sales pitch/talking points	Colin and any additional conference attendees
CONFERENCE		
1 week after	Schedule 40 meetings from conference leads	Conference attendees
6 weeks after	All meetings and sales with conference leads conclude. 25% conversion rate is met.	Conference attendees
8 weeks after	Review data from conference and adjust strategy as necessary.	Conference attendees

ACTION STEP 4: OPERATIONS

Timeline: Ongoing

With a current vacancy in the COO role, operations tasks should be redistributed amongst the remaining team members, with the understanding that something will come off their plates in order to make everything work. At the current time, logistics such as booking travel and making copies should be handled by the individual traveling. Colin and Sarah will need a clear communication system to hand off new clients (likely a standing weekly meeting and an agreed upon technology platform). If there are additional tasks that were previously held by the COO, Colin should distribute those out as he sees fit.

05. LONGER-TERM CONSIDERATIONS

Following this 90 day sprint, thinkLAW will need to consider longer-term priorities and strategies in order to plan for organizational sustainability. SchermCo may be able to continue the support with specific action steps for these longer-term priorities after the completion of the short-term priorities. Included in this list are eight longer-term considerations:

1. Streamline the use of technology and technological platforms: Employees differ in their investment, use, and engagement in technology platforms. Reaching a group consensus on which one product to use (rather than split investment in Zoho, Office365, Mail Chimp, Intralink and others) will create more user buy-in, decrease costs, and ensure consistent usage. This product should fit the data needs of all employees so that various data requests are easy to answer and client follow up is easy to plan and execute. This will require determining the most vital data and prioritize capturing it in a user-friendly, easy to access platform.

Additionally, thinkLAW should confirm that the current technology platform marketed to schools best meets the needs of clients. If the end user struggles to access the content, overall usage rates will suffer.

2. New client onboarding process: Creating and executing a new client onboarding process, including built-in touch points throughout the school year will significantly decrease the challenge of renewals because thinkLAW will have data to react to and more touch points throughout the year.

3. Customer engagement process: After onboarding new clients, thinkLAW should consider how to best engage through celebrating usage, building in customer appreciation touchpoints, and determining how to best engage clients on social media platforms.

4. Staff time and responsibilities: As thinkLAW moves from part-time to full-time staff that is located across the country, how can the organization ensure that all staff is executing to the best of their capabilities? Should compensation be tied to outcomes or output? If the staff is not significantly more productive at full-time, thinkLAW should consider revisiting part-time and contract based positions.

5. Financial stability: thinkLAW should set a long-term goal of having three to six months of payroll and other expenses in its reserves. Benchmarks toward this goal likely include: 6 weeks of payroll on hand by June 30, 2018, and three months by September 30, 2018.

6. Sponsorship Model: thinkLAW may also consider a Sponsorship model for long-term growth. Once a definitive client segment is secure, thinkLAW could begin to seek sponsorships for their curriculum from private law practices and legal departments at Fortune 500 companies. This model may allow thinkLAW to increase revenue (via higher sponsorship price points) while also offering the curriculum to schools at a discounted rate.

7. Board of Advisors: A formal or informal Board of Advisors may allow thinkLAW to engage dynamic law professionals in their growth. These strategic partnerships may create an opportunity for thinkLAW to gain support from the private sector and further consider a sponsorship model.

8. Ideal Client Profile: thinkLAW would benefit from knowing specifically who their target market is. While there are tens of thousands of Title I schools across the US, carefully segmenting this market will lead to a clearer sales strategy. While creating this profile, consider both commonalities of current and potential clients.

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