



# Performance and Goals

2022 and 2023 | 2/7/2023

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# AGENDA

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- I. FY 2022
- II. FY 2023 Financial Goals
- III. FY 2023 Key Initiatives
- IV. A Word on Culture

## 2022 – How Did We Do?

Fee Income: \$7,054,571










- vs. Goal: -\$145,429
- vs. 2021: +20%
- vs. 2018: +3%

## 2022 – Team Turnover

- Target: 20%
- Industry average: 29.3%
- Resignations: 5
- Dismissals: 5
- Our rate: 26%



## 2022 – Key Initiative Scorecard

	<b>MMA</b>	Added JIFFY as new customer, trying to get AFP to buy in, while also retaining current customers. Target case study with Atlas fell short due to lack of sales feedback, but still potential based on lead growth and overall metrics we hope contributing to sales. Expanded capabilities by adding chatbot to Atlas' website and beginning to track performance. Still finding best way to deliver leads since most customers unwilling to integrate with sales CRMs.
	<b>Content Strategy</b>	Team aligned to 10-step process. This includes a competitive audit. Currently evaluating a template, including tools necessary to complete. Wendy exploring resources to supplement. Next step is each department will determine the hours to complete. Questions still remain around how best to incorporate a project of this magnitude into both existing customers as well as new.
	<b>Pricing Strategy</b>	Increased prices in 2022 & 2023. Updated service line items to better reflect current offerings. Major initiative in 2023 with new VP Production hire - phased action plan in place and being executed against.
	<b>Media Operations / Workflow Optimization</b>	All possible reporting is being pulled through GCM and fed into our GDS dashboards. In 2023, we will focus on maximizing reporting insights from GCM, as well as optimize the media tech stack we currently have in-house.
	<b>WMJ Optimization</b>	GaleForce and WMJ automated invoice reconciliation. Launched timetracking 3/2022. Quarterly department actual vs. allocated hours reports. Revitalized Project Scorecarding with more detailed reports and holding monthly reviews/discussions.
	<b>Professional/Learning Development</b>	Instituted SMART goals for performance review process. Outlined approach for L&D plan and gained alignment on four topics in 2023: Negotiation & Selling; Elevating Digital Knowledge; Research Methodologies; Trust/Team Building (with Outside Partner). Creating a section on intranet to house existing materials for self-learning opportunities. Will notify Agency when everything finalized.
	<b>ROAS Model for Foodservice</b>	Outlined needed data. Worked with IRI (and Nielsen) to determine a potential methodology and estimated costs (prohibitive). Sales data currently available from NPD does not meet a minimum desired threshold and typical media spend by channel in foodservice does not afford the minimum desired impressions to measure impact (50M). With the NPD/IRI merger we expect more efficiencies.
	<b>Testing &amp; Optimization</b>	Given the transition in digital team leadership in 2022, we will need through the end of 2023 to realize this vision. This will be part of a performance reporting initiative to evolve and elevate this service.
	<b>Quantum</b>	Task force was assembled and agreed on several emerging technologies to research and present. Prototyped 3D and AR for both Campbell's and Atlas. Currently finishing micro-market activation for Campbell's with 3D shelf of snack products. Atlas decided not to move forward with 3D yet, they seem interested for the future and believe a test and learn approach could prove success.

# 2022 – New Business Wins



# 2022 - The Good Stuff

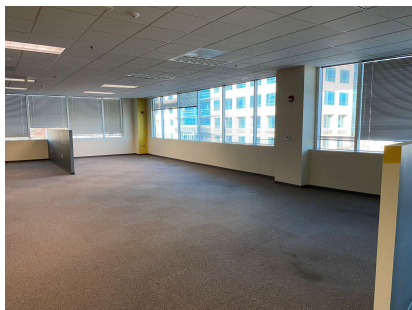
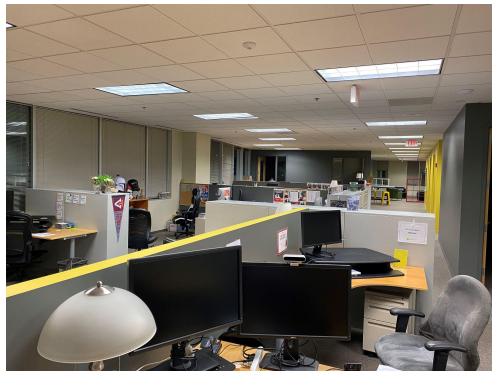
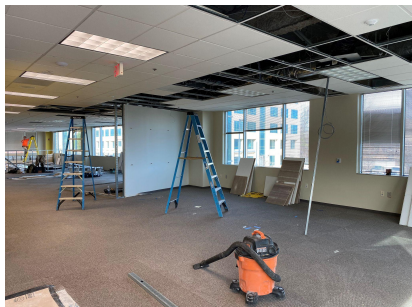
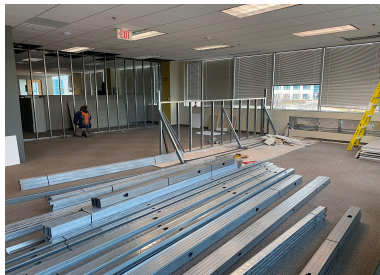
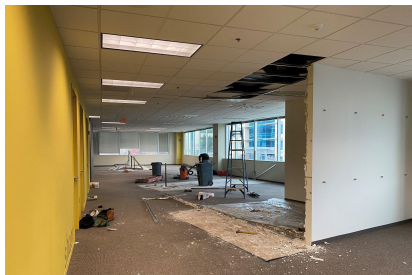


- Spring Fling-a-Gift
- Chik-Fil-A Breakfast
- Donut Week
- Cornhole Tourney
- Crab Feast
- Halloween Costume Contest
- Friendsgiving Potluck
- Maryland Food Bank Volunteer
- Holiday Par-tay!





# 2022 - Office Refresh



How about next year?

## 2023 – Goals

- Fee Income: \$7.7 MM (10% increase over 2022)
  - a. Our 2022 goal was \$7.2 MM
- Employee Turnover: 25% (one point better than 2022)
  - a. Our 2022 target was an aggressive 20%
  - b. We came in at 26%, 3.3 points lower than the industry average
  - c. We want to continue to improve but have set the metric based on the realities of advertising being a high turnover industry
  - d. Learnings from engagement survey will be key

How about next year?

# 2023 – Goals by Department

Creative	\$1,450,000
Production	\$ 680,000
Client Services	\$2,050,000
Media and Performance	\$1,870,000
Digital	\$1,413,000
Insight/Planning/Research	\$ 290,000
<b>Total</b>	<b>\$7,753,000</b>

How do we get there?

# The Leaky Bucket

Goal	\$7,700,000
Base	\$7,050,000
90% retention	\$6,345,000
10% growth on existing customers	\$6,979,500
Current new business target	\$720,500

## Initiatives Overview

Initiative	Description	SLT Owner	Partner Sponsor
Optimize Mix	Ensure focus is on our stickiest and least commoditized offerings	Wendy/Trey	Rob
People First	Build organizational capability	Nikki	Susan
Business Management	Streamline and document processes for efficiency and sanity	Nicole	Susan
Idea Presentation	360 degree holistic campaign development	Matthew	David
Agency Growth	Support new business efforts; organic business growth	Anne T	David



# A Word on Culture

Culture is often associated with happy hours, crab feasts and holiday parties. Although these gatherings are fun, we believe that culture goes much deeper. It is what underpins our actions and behaviors with our customers and each other.

At Marriner, we strive for a culture of:

**Authenticity**

**Curiosity**

**Understanding**

**Grit**

**Generosity**



Thank you for your support!

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