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Name The Occasion

12-Month Marketing Plan & Schedule of Events

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Date

This is a business plan. It does not imply an offering of securities.

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Name The Occasion Marketing Plan

1.0 Executive Summary

Introduction

Name The Occasion is a premier gift basket manufacturer and retailer. Name The Occasion is concentrating on making gourmet gift baskets out of a wide range of high-quality ingredients. In addition to having several flagship baskets, we also offer the option of a custom basket allowing the customer to choose the ingredients themselves. Name The Occasion will be selling to individuals as well as corporations. Currently, 50 percent of our business is corporate and the other 50 percent is retail and internet. This marketing plan intends to triple the volume of business we receive from corporate accounts by adopting an aggressive marketing and sales strategy geared to a specific corporate target market.

Name The Occasion is currently earning \$5,000 a month in gross revenue. By December 2007 we expect to earn \$14,000 in monthly revenue. By the end of 2009, it is projected that Name The Occasion will be generating over \$15,000 in income on a monthly basis.

The Company

Name The Occasion mission is to create the finest gift baskets available. Doris Grant is the owner/operator. With more than 10 years gift basket experience, she brings forth this plan to increase sales while still maintaining her high standards to quality design and excellent customer service.

The Market

To achieve our ambitious sales goals, we must devote most of our energy on the best target market. We have decided that market will include the following:

- Commercial & Residential Property Management Companies
- Corporate Housing Companies
- High-End Dealerships

Our competitive advantage will be based on three factors, hiring a professional telemarketer, networking directly with property managers and increasing our referrals from satisfied customers.

1.1 Objectives

The objectives for the first three years of operation include:

1. To implement an aggressive marketing strategy that will triple the current sales volume within 12 to 24 months.
2. Develop effective internal management systems that will give Doris Grant the ability to handle this growth.
3. To recruit people who will fit with and compliment our 12-month marketing strategy.

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1.2 Mission

Our mission is to make a difference in the way our Corporate and Personal clients experience gift giving. We achieve this goal by exceeding their previous gift giving experiences, by providing outstanding customer service and an array of decadent gourmet foods products and stand alone gifts.

2.0 Company Summary

Name the Occasion provides a wide range of gourmet gift baskets, production as well as custom units. All Name the Occasion gift baskets are hand assembled using premier ingredients, local when possible. The business is based out of Richmond, California. Located in a commercial property, the business has over \$3,000 in inventory stocked and employs one full-time basket designer. The business is profitable and intends to increase revenue at least 50% over the next 24 months by implementing an aggressive marketing strategy.

2.1 Company Ownership

Name The Occasion is owned and operated by Doris Grant. This is a sole proprietorship.

3.0 Products

Name The Occasion sells gourmet, hand-assembled gift baskets. Name The Occasion has two very different customer who purchase different types of gift baskets. The two customers we have are classified simply as corporate and retail. Corporate customers are those who purchase on a monthly, quarterly or yearly basis. Corporate customers will always purchase based on style, theme and budget. Gift baskets usually purchased by corporate customers include, themed thank you baskets, golf themed gift baskets and fruit baskets. The prices range from bare minimum \$15.00 dollar gift to \$100 dollars, with the average corporate gift basket selling for \$60.00. The retail customer are those who purchase for friends or family once or twice throughout the year. Retail customers will usually began by choosing a theme or occasion, such as a wedding, birthday or new baby. They will then select a price range and either choose from those already made or they will select products to add or subtract from the basket until they are satisfied with that exact gift basket.

While retail customers are normally seasonal buyers of gift baskets, corporate customers purchase gift baskets all year long.

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4.0 Market Analysis Summary

As already stated Name The Occasion has two distinct market segments, individuals and corporations. Both groups buy gift baskets as a goodwill gesture, typically for different reasons. Individuals typically buy the baskets as a present. 50 percent of our retail sales are birthday and new baby gift baskets. The other 50 percent of sales occur during Christmas, Mother's Day and Valentine's Day. Corporate customers buy gift baskets for new customers, existing customers and employee birthday's. By going after both of these groups, sales will be less seasonal (relative to if only the individuals were targeted).

Overall our retail customers come from two locations and require two different marketing strategies. Retail customers come from either Alameda County or San Francisco County and the others come from the world wide web.

Currently, our corporate customers are property managers, mortgage officers, realtors and various small business owners. More than 80 percent of our corporate customers reside within a 50 mile radius of our location in Richmond California.

4.1 Market Segmentation

Name The Occasion has two distinct groups of customers, individuals and corporate customers:

1. **Individuals**- The individuals are people who are looking to give a friend, relative, colleague, etc., a gift basket as a gesture of goodwill. These customers typically want to purchase for a specific event, such as a birthday, wedding, new baby or for a specific holiday. They usually want to customize the basket by selecting specific additions to our choice of themed gift baskets. These customers require more time and attention at the beginning, but will likely purchase a higher priced gift basket.
2. **Corporate**- The corporate customer is buying the basket for a variety of different reasons. For example, property managers use our baskets to welcome a new tenant. Realtors use our baskets to say thank you to a new home buyer. Corporate customers also use our baskets to show appreciation to employees or to recognize an employee's special event such as a birthday, anniversary or wedding. The corporate market can be further broken down to banks, health care, employment gifts, special events/promotions, corporate headquarters, hotels/vacation resorts, and automobile dealerships.

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Market Analysis (Pie)

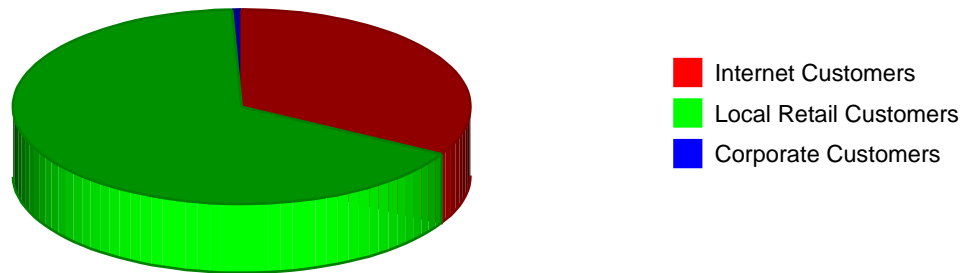


Table: Market Analysis

Market Analysis	Growth	2007	2008	2009	2010	2011	CAGR
Potential Customers							
Internet Customers	5%	25,000	25,250	25,500	28,000	30,500	5.10%
Local Retail Customers	10%	50,000	55,000	55,500	61,500	62,500	5.74%
Corporate Customers	20%	500	600	620	724	868	14.79%
Total	5.59%	75,500	80,850	81,620	90,224	93,868	5.59%

4.2 Target Market Segment Strategy

Name The Occasion will focus primarily on corporate customers because they have offered the greatest percentage of sales to our business. Our second but no less important focus are internet customers. They represent the highest profit in terms of cost of sale. Therefore, we are investing a considerable amount of marketing to attracting potential internet customers.

Name The Occasion has identified the best target markets for corporate customers. Those markets include;

1. Property Management Companies
2. Corporate Housing
3. high-end Auto Dealerships

Property Management Companies

There are two types of property management companies; residential and commercial. Although there are property management companies nationwide, for purposes of this marketing plan we have decided to limit or research and focus only on those companies located in California. In California, there are over 5,000 residential and over 1,000 commercial property management companies. The number of properties they either own or manage can be only 1 to as many as 15 or more. To reach residential property managers we will direct our marketing activities towards

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- National Association of Residential Property Managers. The California State Association chapter has 326 members
- National property Management Association. California has nine chapters with a combined membership of 724 property managers.
- Professional Property Management Association of San Francisco. This group has 60 current members

To reach commercial property management companies and building owners we only have identified The Building Owners and Management Association of California. They have chapters all over California. Chapters include;

- BOMA Greater Los Angeles
- BOMA Inland Empire
- BOMA Oakland-East Bay
- BOMA Orange County
- BOMA Sacramento
- BOMA San Diego
- BOMA San Francisco
- BOMA Silicon Valley

To reach residential property managers and their management companies we will network with the National Association of Residential Property Managers. They have chapters all over California. Chapter include;

- Alameda/Contra Costa
- California State Association
- Marin/Sonoma
- Monterey Bay
- North Los Angeles
- Sacramento
- San Diego
- San Francisco
- San Joaquin
- Santa Clara

Corporate Housing

Corporate housing represents those companies that either own or manage apartments, condo and homes which are rented on a short term basis to companies who have employees working away from home for an extended basis. Companies utilize corporate housing when employees are required to work a minimum of 30 days away from home. We did not find one single association or organization representing corporate housing companies. However, a simple goggle search located over a dozen california based corporate housing companies. Some of the largest include the following;

- Churchill Corporate Services
- Equity Corporate Housing
- The Irvine Company Apartment Communities
- Oakwood Worldwide, Los Angeles Headquarters
- Key Housing Connections
- Extended StayHomes.com
- Preferred Corporate Housing
- Suites America
- Alexander Hamilton Homes West

High-End Auto Dealerships

Although new car dealership provides some type of appreciation gift to its customers, our

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research shows that most dealerships simply provide some type of promotional gift such as hats, t-shirts, coffee mugs or key chains. However, high-end dealerships appear to be willing to invest more time and money into providing a gift that will convey a deeper sense of appreciation and gratitude for the business. The high-end dealerships we have identified include the following;

- Mercedes. There are 30 dealerships in California
- BMW. There are 48 dealerships in California
- Jaguar. There are 20 dealerships in California
- Land Rover. There are 11 dealerships in California
- Cadillac. There are 87 dealerships in California
- Lexus. There are 31 dealerships in California
- Porsche. There are 14 dealerships in California
- Hummer. There are 4 dealerships in California

There are a total of 245 dealerships in our target market.

Individual or retail customers make up our second target market group. Within this target market we have two separate and distinct groups. For purposes of this marketing plan we will only focus our attention on Internet customers. As you can expect, trying to estimate the overall potential market for internet sales is extremely complex and guesswork. Every year, millions of individuals use the internet to purchase all manner of gifts including gift baskets. However, there is thousands of companies large and small selling gifts and gift baskets online. So competition is extremely tight and crowded. Therefore, we simply wish to see a 10 percent increase in sales via our website annually. More are provided in our website marketing strategy.

4.3 Industry Analysis

In terms of local competition, we focus our research on Alameda County, Marin County, Contra Costa County and San Francisco County. There are many different forms of competition in the gift basket business:

1. **Similar gift basket type retail stores:** Doing a yahoo search, we found 25 gourmet gift basket companies. These competitors offer a wide range of gift baskets and they supply all manner of gourmet products, both low end and high end.
2. **Nut/fruit companies:** There are another 15 companies and stores that concentrate on nuts and or fruit baskets.
3. **Candy/Cookie gifts & gift baskets:** There are more than 50 candy stores and cookie companies that provide significant competition. Typically customers can receive more gift or see a bigger value by spending \$25.00 dollars on candy and cookies than what they would receive from a similar priced gift basket.
4. **Florists:** We only found 8 florist that also sell gift baskets. We know there are hundreds of florist in our target market, however only a few of them try to compete directly with gift basket companies.

The purchasing of gift baskets from our retail customers is very "seasonal." More than half of the gift basket purchasing occurs during a wide variety of holidays. However, corporate customers buy on a as need basis. They buy for new clients, employees and for seasonal holiday events.

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4.4 Marketing Programs

STRATEGIC ACTION PROGRAMS

The following strategic action programs will be implemented immediately.

1. Convert existing database into an ACT Database.
2. Doris will began researching business associations that are in Oakland and San Francisco. The specific associations have already been identified within this marketing plan.
3. Doris will also begin spending more time at the office handling direct marketing activities. These activities include, building the new ACT database, email marketing to clients and prospects and working on the referral marketing system.
4. Small Business Salesforce will begin interviewing and selecting the appropriate telemarketers for Name The Occasion. SBSF will also work closely with Doris Grant in developing email and direct mail to attract and solicit referrals from satisfied customers.

OUR BUDGET FOR MARKETING CAMPAIGN

Based on the four key strategies as explained above, here is a cost breakdown for each strategy.

1. Convert existing database into ACT Database. (\$200.00)
2. Staying active networking with two networking organizations. Includes membership, food, dues, and raffle giveaways. This is an estimate for the entire 12 month period of 2007. (\$2,400)
3. Hiring a Telemarketers. This only includes the fee to Telemarketer for administrative cost. We estimate a charge of \$15.00 an hour and a minimum of 10 hours per week. This does not reflect the cost associated with commissions, since that cost will vary and cannot be estimated in this budget. (\$600.00 a month for 40 hours of administrative work)
4. Develop a DRIP Referral Program. This cost includes postcards, email marketing system and direct letters. This is an estimate for the entire 12-month period. (\$500.00)
5. Providing marketing materials to telemarketers. This includes sample gift baskets, business cards, brochures and color flyers. This is an estimate for the entire 12 month period of 2007. (\$1,200)

Based on the above figures, we have a yearly marketing budget of \$11,500.

IMPLEMENTING MARKETING PLAN

Convert existing Database into Act Database

What follows is a beginning plan for converting all your existing files and folders into a

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workable database. Purchase the ACT Database. Small Business SalesForce will provide initial training. Using this database will allow Doris Grant to easily keep track of prospects, clients and leads. In addition, using an ACT database allows Name The Occasion to share information with other sales reps.

THE GOAL: Is to develop a system for tracking all clients, prospects and leads in an efficient manner.

Become Active with Business Associations that will produce sales results.

What follows is a beginning plan for making Doris Grant as productive as possible. Currently, Doris Grant is involved with several networking groups and local chamber organizations. However, these memberships and the time spent is not producing the most lucrative corporate accounts. Therefore, Doris must spend her time networking with property management associations located in Oakland and San Francisco and much less time with her existing networking groups. This will make the most of Doris time and sales energy.

THE GOAL: Is to give Doris Grant the opportunity to network with only those individuals who can provide the best opportunity for sales.

Hire a Direct Marketing & Sales Organization

What follows is a beginning plan for implementing an aggressive sales and marketing campaign. Every small business must recruit help if they are to effectively grow. In this case, sales must be done by others simply because Doris Grant cannot be at two places at the same time. The first step is giving Small Business SalesForce the go-ahead to start searching for and interviewing professional independent sales reps. The second step is structuring a business contract that will provide a win-win relationship for all involved. The third step is working closely with SBSF and the telemarketers to insure money, time and potential sales are not being lost or wasted. The last step is to properly handle all paperwork, accounting and database records so that the sales process, billing and commissions are correctly received and paid out so that the system remains a win-win for everyone.

THE GOAL: Implement an effective sales force but at a cost that will still allow Doris Grant to receive a sufficient profit. Understanding that adopting any kind of a sales force requires some type of investment, nevertheless, careful consideration must be taken in terms of which system to adopt and exactly who will be hired to do the work.

Develop a DRIP Referral Program

What follows is a beginning plan for creating a referral program. First, you start with all your existing clients. Regardless of when you last contacted them, everyone will receive a letter and gift. Then everyone will also be called at least once and asked to provide a referral. A DRIP program simply means that every single client will be reminded to provide a referral at least once every 60 days. To do this effectively, you need to have a working database and develop an organized marketing system.

THE GOAL: Is to double the number of referrals you are currently receiving from clients.

Conclusion

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Based on the level of activity and the amount of funds being spent, we feel confident in our ability to realize gross sales of \$125,000 by January 2008. Furthermore, the business will be better organized and providing Doris Grant with more enjoyment and quality of life. The goal cannot be to simply earn money for the sake of profits. It must be about the quality of life for the owner. Therefore, business systems must be in place to handle the increased sales. Just like there is a system in place to handle the gift basket production, there needs to be another system in place to handle the sales and marketing. Because if there is no system in place, increasing sales will not matter in the long run.

5.1 Competitive Edge

Our competitive advantage will be based on two factors. First, continuing to brand our company for creating extremely attractive, expensive looking gift basket designs while charging no more than our direct competitors. Second, implementing a marketing strategy that utilizes professional sales reps, fully automated website and a strong focus on a specific niche market. Together, these three advantages will greatly increase our ability to separate ourselves from direct and indirect competition.

1. Name The Occasion has already established a brand recognition for creating extremely attractive gift basket designs. We use extensive colors, ribbons, bows and creativity in all our gift baskets. While most gourmet gift basket companies fill the baskets with many of the same high quality gourmet products, being able to create the right design and presentation become very important. Doris has trained one gift basket designer so that she can create award winning baskets like the owner and founder Doris Grant. So as we bring in new corporate and retail customers, we will always strive to wow and impress them with basket designs that are original, fresh and colorful.
2. The marketing and sales strategy being developed is another example of how our company is different from our competition. Most gift basket companies are home-based. The marketing strategy utilized normally consist of creating a website, 800 phone and fax number, direct mail during the christmas holiday season and going after local corporate business with phone calls and direct presentations. None of these home-based companies invest in a sales force. Nor do they focus most of their marketing activity on corporate business statewide or nationwide. Also, since they are home-based they usually do not maintain a sizable inventory of gourmet products. The bottom line is this; Name The Occasion already has a proven system for delivering hundreds of impressive gourmet gift baskets every month, now we are implementing a system for generating new customers on a monthly basis. The existence of effective systems in place and experienced management running the overall operation is our clear competitive advantage.

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5.2 Sales Strategy

Name The Occasion sales strategy will be targeted at obtaining both the individual and corporate clients. It is our belief that the individual customers will be primarily obtained through internet sales and phone and walk in traffic derived from word of mouth referrals. It is likely that they will have spoken to a previous client about Name The Occasion and the referral of our services will speak for itself. Our sales strategy will be to use an emphasis on our value and high quality when trying to close the sale of the prospect. The prospective client can get a similar product from a number of different vendors. However, it is our gift basket design and presentation that will close the sale. By having a showroom where potential customers can pick out the different gourmet products to go into their gift basket and then seeking display's of previous gift baskets designed with our signature elegance and flair will hopefully close all sales from that point. The combination of the perception of higher quality and the recognition of value should turn a lead into a customer.

Additionally, we provide several ways for individuals to place orders for gift baskets. One way is for the customer to come by the office and place the order. The customer can also place the order through a phone call. Either they have ordered before, or are looking at a brochure and know what they want, or they can visit our website for a complete catalog of our products. To receive the product, they can pick up the product, or they may have it shipped via UPS. Name The Occasion believes that by providing the customer a wide range of options, they will feel that they are special as we will do a wide range of services to accommodate them. Our sales strategy for individuals will be based on our Web presence, printed catalogs and in conjunction with networking and long standing presence in Alameda County.

The sales strategy we have developed for closing sales with corporate clients is very different that the methods used for retail customers. The various methods employed to close the sales for lucrative corporate clients includes;

1. Networking closely with specific business associations to meet decision makers and then conducting face to face sales presentations.
2. Using professional sales rep's to call prospects, conduct sales presentations over the phone and then send a free sample gift basket as a way to secure the relationship.
3. Using direct mail, email and personal calls to previous and existing corporate clients. The goal is to receive referrals and increase the business we receive from these clients.

A summary of the sales strategy employed for each system is provided below.

1. Networking with business associations

As we have already stated, our target market for corporate clients includes, residential & commercial property management companies, corporate housing companies and high-end auto dealerships. Doris Grant is going to research specific property management associations that have significant memberships in the Bay Area. Those already identified include;

- Professional property management association of San Francisco
- Building Owners and Managers Association, Oakland Association
- National Association of Residential Property Managers, Oakland Association, San Francisco Association

Choosing the group that offers the most promise, Doris will become an associate member. This will provide her with access to all its members, participation in all their social functions, exposure on their association website and the opportunity to personally network and conduct sales presentations for their business.

2. Using Professional Sales Representatives

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Name The Occasion will hire professional telemarketers with expertise in making sales presentations via the phone to secure new corporate accounts with property management companies, corporate housing companies, and high-end auto dealerships. They will be paid commission only, however they will also be paid a monthly fee for administrative services. The following steps outline the process involved in utilizing this specific sales strategy.

1. Hire Small Business SalesForce to find, recruit and hire one or more professional telemarketers to produce sales using phone, email and the internet to make sales presentations.
2. Structure the business arrangement so that the sales person or receives no more than 20% commission on all sales they generate for a 12 month period. After 12 months, the commission is reduced to 10% and then after 36 months commissions are 5%.
3. Telemarketers are provided with an initial prospect sheet or list. This list will be residential and commercial property managers throughout California. In turn, telemarketers will provide monthly reports showing who was contacted, who are the decision makers, what was said or accomplished.
4. Doris Grant will provide telemarketers with marketing materials when needed. This includes business cards, flyers, brochures and sample gift baskets.
5. Telemarketers main sales strategy is to arrange a meeting over the phone with the decision makers and walk them through Name The Occasion's website. Demonstrating the various corporate gift baskets, prices and explaining the companies track record with working with corporate accounts.
6. Once a new client places an order, Doris Grant provides this information to telemarketers and from that moment on, Doris provides a monthly sales report showing what was purchased, total charge and commissions earned.

This system should be a win-win for everybody. Name The Occasion receives professional outside sales representation at a cost that is included into the price of the product. This makes hiring outside sales reps affordable. The sales reps will receive residual income from sales for an extended time, while working a set number of hours generating sales.

3. Generating Referrals From Existing Corporate Clients

Again, this responsibility falls on Doris Grant, although she will have help from Small Business SalesForce. SBSF will have the responsibility of creating email and letters designed to generate referrals from satisfied customers. Doris Grant is charged with sending the email and direct mail on a monthly basis.

5.2.1 Sales Forecast

Our direct cost is only the cost of products, materials and the basket for each sale. We use a familiar cost system called keystone. This means we take the cost we pay for each product added to a gift basket and double the cost. So a \$100 dollar gift basket cost us \$30 dollars in product. We are not including labor into this direct cost. That will be done in our profit and loss and in our personnel financial charts.

Currently, we are realizing an average of \$5,000 a month in gross sales with the bulk of our sales coming from property management accounts. We expect to have our telemarketing sales strategy running by January or February at the latest. Further, we anticipate there will be conservative growth from auto dealerships and corporate housing throughout the year. However, since our main focus will be with property management companies, we anticipate greater sales success and profits.

By the time September 2007 arrives, we expect to be in a position to triple the volume of business during the coming holiday season. Projected gross revenues of more than \$125,000

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are very possible provided all our marketing and sales strategies are operating at full strength. Name The Occasion recognizes that it will take an extreme effort on the part of Doris Grant to handle the additional workload based on these sales projections. However, Doris has begun the process of preparing for this new sales volume by working closely with bookkeepers, gift basket designers and vendors.

Year 2008 and 2009 show a modest 20% growth across the board. We realize this will not be the case and some markets will see either a greater or smaller revenue projections, however our intentions are to surpass this 20% estimate for all markets.

Sales Monthly

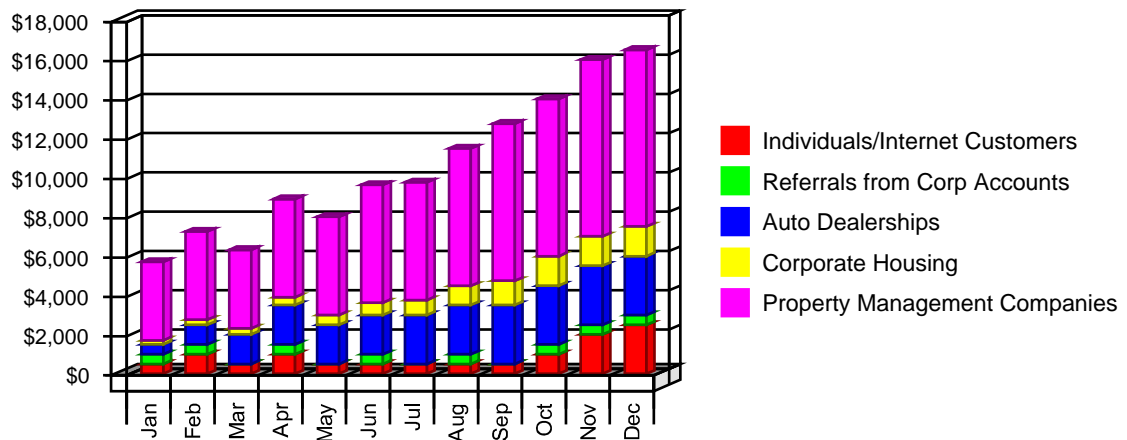


Table: Sales Forecast

Sales Forecast			
Sales	2007	2008	2009
Individuals/Internet Customers	\$11,000	\$16,500	\$18,250
Referrals from Corp Accounts	\$4,000	\$4,000	\$4,000
Auto Dealerships	\$26,000	\$33,000	\$37,000
Corporate Housing	\$9,758	\$18,000	\$23,000
Property Management Companies	\$75,500	\$93,000	\$108,000
Total Sales	\$126,258	\$164,500	\$190,250
Direct Cost of Sales			
	2007	2008	2009
Individuals/Internet Customers	\$3,300	\$4,080	\$4,560
Referrals from Corp Accounts	\$1,200	\$1,200	\$1,200
Auto Dealerships	\$7,800	\$9,300	\$11,100
Corporate Housing	\$2,595	\$3,600	\$4,320
Property Management Companies	\$22,750	\$27,000	\$32,400
Subtotal Direct Cost of Sales	\$37,645	\$45,180	\$53,580

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5.2.2 Sales Programs

As we have discussed, Name The Occasion will implement three new sales programs in the attempt to triple the volume of business we generate on a monthly basis. These sales programs will now be described in detail.

Telemarketing

We are going to hire a professional telemarketer to contact commercial & residential property management firms, corporate housing firms and building owners throughout California. The telemarketer will be charged to achieve these specific goals.

- Conduct phone interviews to determine if they use appreciation gifts for tenants and other clients.
- Determine who is the person responsible for making gift giving decisions for that department or company.
- Connect with that person by phone. Give a brief presentation and attempt to conduct a more extensive presentation by showing them our website and gift selection.
- The overall goal is to secure new business by presenting our products and services to these decision makers. This will be done for a minimum of 6 hours a week for the at least the first 3 months of 2007.

We have already identified and hired our telemarketer. Her name is Dianne Woodley. Her address is 1647 Conneley Avenue, Chula Vista, CA 91911. Her home number is (619) 422-0209, her fax number is (619) 422-6805 and her cell number is (619) 518-6160. Dianna has over 10 years experience as a professional home based telemarketer. She brings the following experience to the table.

- Detroit, MI Unishippers DHL for the last 5 years. Duties include setting appointments with shipping supervisors.
- Leads to Wealth for 2 years. Duties include setting appointments and developing database.
- Sedberry Company for 8 years. Duties include setting appointments for health insurance for Kaiser Insurance.
- Owner/Operator of non profit called Angel Harps. I have had a special harp designed for disabled children and have held fund raising concerts for the last two years.

Starting in January 2007, we will train, provide leads and calling scripts. Dianna will receive as compensation \$15.00 an hour, plus a monthly bonus of \$100 dollars for every new client after they place their first order with our company.

Networking Organizations

Doris Grant will redirect her networking energy towards a more productive and potentially lucrative market. Specifically, Doris will cease to attend networking events at the Ambassadors Group, El Cerrito Chamber, Richmond Chamber, Contra Costa Assn of Realtors and BNI. Instead she will focus her networking attention on the National Association of Residential Property Managers and the Building Owners and Management Association. We have determined that we should only focus our networking attention to those groups that offer the best opportunity to meet property management firms.

Building Owners and Management Association. (BOMA). We will network with the Oakland-East Bay Chapter. The web address is www.bomaoeb.org. The address is 1000 Broadway, Suite 355, Oakland CA 94607. The phone number is (510) 893-8780. The website does not list its Professional Members but they do list the allied members, (those companies that provide products and services to its professional members). There are over 123 allied

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members and not one of them provides gift baskets or gifts of any kind. We would see no competition in the beginning of our networking. Of course, other gift basket companies might decide to join after they learn we have become members. The only real challenge to joining and networking is the membership annual fee. Currently it cost \$1,100 to have an annual membership. This does not include the cost of the monthly luncheon or dinner that take place. However, it is still in our best interest to join and network with this organization as soon as financially possible.

National Association of Residential Property Managers, Alameda County Chapter. This is an association with 19 residential property managers that serve the Bay Area. The web address is www.narpmacc.org. Eric Hogleund is the President and his contact information is (707) 745-0924, email is eric@esteyrealestate.com. This organization only has 5 allied members and once again nobody offers gifts and gift baskets.

Referral Program

It is a well established fact that word of mouth advertising is the best way to secure a new client. This is true for several reasons. First, the cost to secure a new client through referral is extremely low compared to using sales people or advertising. Second, your much more likely to get a new client that is very much like the client that gave you the referral. This is extremely important when you consider the long term advantages and disadvantages of a good or not so good client. Therefore, it is very important to adopt a sales program that devotes time and money towards implementing a referral program. The specific details about the program are as follows.

1. Doris Grant will begin a DRIP program with her existing and new clients. By sending email, direct mail and making personal calls on these clients to ask for a referral. In exchange for the referral we will offer them a 20% discount on their next order or a \$25.00 dollar gift. In both situations the gift will not be rewarded until the referral places a new order with the company.
2. Dianna Woodley, (Telemarketer) will be able to use this as a tool when speaking with new clients and to some extent prospects. She can also make the same offer of gifts for their valuable referrals.

To clarify what we mean by referral. For us, a referral is when a client tells another person who works for a company that has a need for our gift giving services, about us and encourages them to use us. They also must then provide us with that persons contact information so that we may contact them directly.

5.3 Milestones

Each milestone is critical to the successful implementation of our 12-month marketing plan.

Milestone 1, Recruit, Hire and Train Telemarketer. So far we are on schedule. We have recruited and should effectively hire one telemarketer by January 1. Training will begin soon after. Dianna Woodley should be working part time by January 15, 2007.

Milestone 2, Join Two Business Associations. We are right on schedule. We have begun to process of separating from existing networking groups and we have identified the groups we will join. We expect to join these new organizations no later than March 2007.

Name The Occasion Marketing Plan

Milestone 3, Begin DRIP Referral Program. We are on schedule. The program will be implemented as soon as we populate the new database.

Milestone 4, Convert existing database. We are on schedule. Deciding to use a web-based contact management software system, we are in the process of reviewing three models. Once the decision is made, training will take only a few days or week. We expect the database to be in operation by February 2007.

Table: Milestones

Milestones Milestone	Start Date	End Date	Budget	Manager	Department
Recruit, Hire & Train Telemarketers	11/1/2006	3/1/2007	\$400	Thomas	Marketing
Join two Business Associations	1/1/2007	3/30/2007	\$2,400	Doris	Marketing
Begin DRIP Referral Program	2/1/2007	12/1/2007	\$500	Doris	Marketing
Convert Existing Database into ACT	1/1/2007	3/1/2007	\$300	Thomas	Marketing
Totals			\$3,600		

6.1 Personnel Plan

The staff of Name The Occasion will consist of Doris Grant working full time. Doris is responsible for the following assignments:

- Handles inventory procurement
- Gift Basket design
- Attending local networking events
- The overall management of the companies sales and marketing

Mary is the part time gift basket person. Her responsibilities include:

- Prepare and assemble volume gift basket orders.
- Box orders for delivery
- Call and place orders with Fedex, California Overnight and UPS.
- Take orders via phone when Doris is not in office.

Doris also has an assortment of friends and associates who can be called upon to help with assembly of larger and immediate gift basket orders. These people are not on the payroll and will be paid on a project basis.

Table: Personnel

Personnel Plan	2007	2008	2009
Doris Grant	\$24,000	\$35,000	\$45,000
Gift Basket Designer	\$12,340	\$15,000	\$15,000
Other	\$0	\$0	\$0
Total People	2	2	2
Total Payroll	\$36,340	\$50,000	\$60,000

Name The Occasion Marketing Plan

7.3 Projected Profit and Loss

The following table will indicate projected profit and loss.

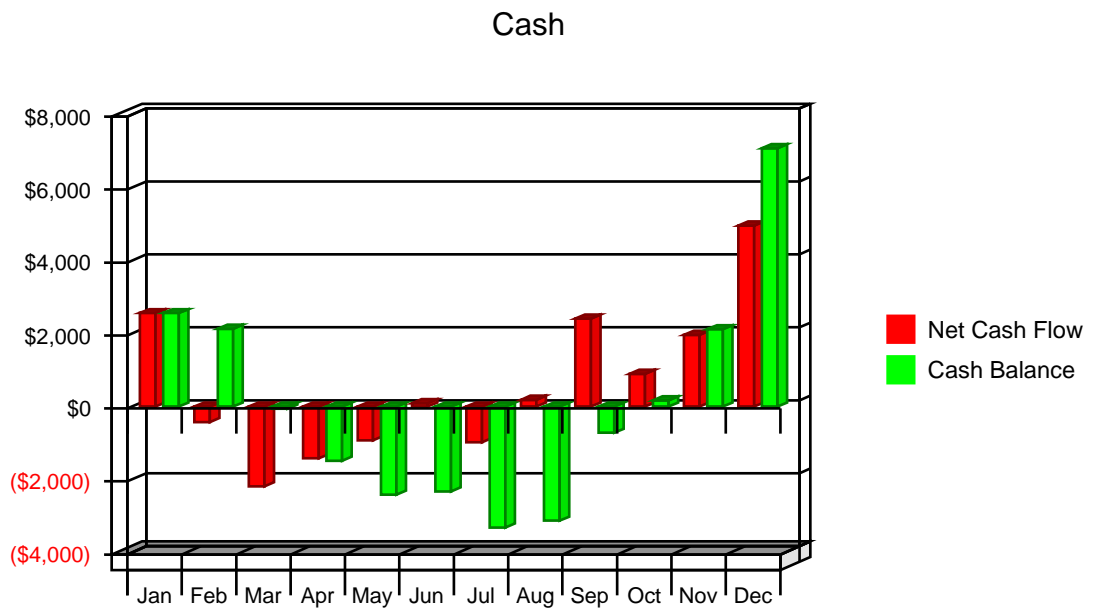
Table: Profit and Loss

Pro Forma Profit and Loss	2007	2008	2009
Sales	\$126,258	\$164,500	\$190,250
Direct Costs of Goods	\$37,645	\$45,180	\$53,580
Other	\$0	\$0	\$0
	-----	-----	-----
Cost of Goods Sold	\$37,645	\$45,180	\$53,580
Gross Margin	\$88,613	\$119,320	\$136,670
Gross Margin %	70.18%	72.53%	71.84%
Expenses:			
Payroll	\$36,340	\$50,000	\$60,000
Networking Expenses	\$1,950	\$2,000	\$2,000
Depreciation	\$504	\$672	\$672
Marketing Materials	\$700	\$900	\$900
Leased Equipment	\$0	\$0	\$0
Telemarketing Hourly Fees	\$5,400	\$1,500	\$1,500
Commissions	\$10,700	\$7,000	\$9,000
Referral Fees & Gifts	\$2,000	\$2,000	\$2,000
Utilities	\$2,400	\$2,800	\$2,800
Insurance	\$600	\$800	\$800
Rent	\$24,000	\$26,000	\$26,000
Payroll Taxes	\$4,275	\$5,850	\$5,850
Other	\$0	\$0	\$0
	-----	-----	-----
Total Operating Expenses	\$88,869	\$99,522	\$111,522
Profit Before Interest and Taxes	(\$256)	\$19,798	\$25,148
Interest Expense	\$0	\$0	\$0
Taxes Incurred	\$0	\$4,950	\$6,392
Net Profit	(\$256)	\$14,849	\$18,756
Net Profit/Sales	-0.20%	9.03%	9.86%

Name The Occasion Marketing Plan

7.4 Projected Cash Flow

The following chart and table will indicate projected cash flow.



Name The Occasion Marketing Plan

Table: Cash Flow

Pro Forma Cash Flow	2007	2008	2009
Cash Received			
Cash from Operations:			
Cash Sales	\$126,258	\$164,500	\$190,250
Cash from Receivables	\$0	\$0	\$0
Subtotal Cash from Operations	\$126,258	\$164,500	\$190,250
Additional Cash Received			
Sales Tax, VAT, HST/GST Received	\$0	\$0	\$0
New Current Borrowing	\$0	\$0	\$0
New Other Liabilities (interest-free)	\$0	\$0	\$0
New Long-term Liabilities	\$0	\$0	\$0
Sales of Other Current Assets	\$0	\$0	\$0
Sales of Long-term Assets	\$0	\$0	\$0
New Investment Received	\$7,000	\$0	\$0
Subtotal Cash Received	\$133,258	\$164,500	\$190,250
Expenditures			
Expenditures from Operations:			
Cash Spending	\$2,317	\$3,787	\$4,624
Payment of Accounts Payable	\$123,865	\$146,078	\$167,230
Subtotal Spent on Operations	\$126,181	\$149,864	\$171,853
Additional Cash Spent			
Sales Tax, VAT, HST/GST Paid Out	\$0	\$0	\$0
Principal Repayment of Current Borrowing	\$0	\$0	\$0
Other Liabilities Principal Repayment	\$0	\$0	\$0
Long-term Liabilities Principal Repayment	\$0	\$0	\$0
Purchase Other Current Assets	\$0	\$0	\$0
Purchase Long-term Assets	\$0	\$0	\$0
Dividends	\$0	\$0	\$0
Subtotal Cash Spent	\$126,181	\$149,864	\$171,853
Net Cash Flow	\$7,077	\$14,636	\$18,397
Cash Balance	\$7,077	\$21,712	\$40,109

Appendix

Appendix Table: Sales Forecast

Sales Forecast												
Sales	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Individuals/Internet Customers	\$500	\$1,000	\$500	\$1,000	\$500	\$500	\$500	\$500	\$500	\$1,000	\$2,000	\$2,500
Referrals from Corp Accounts	\$500	\$500	\$0	\$500	\$0	\$500	\$0	\$500	\$0	\$500	\$500	\$500
Auto Dealerships	\$500	\$1,000	\$1,500	\$2,000	\$2,000	\$2,000	\$2,500	\$2,500	\$3,000	\$3,000	\$3,000	\$3,000
Corporate Housing	\$200	\$250	\$312	\$400	\$500	\$625	\$756	\$975	\$1,240	\$1,500	\$1,500	\$1,500
Property Management Companies	\$4,000	\$4,500	\$4,000	\$5,000	\$5,000	\$6,000	\$6,000	\$7,000	\$8,000	\$8,000	\$9,000	\$9,000
Total Sales	\$5,700	\$7,250	\$6,312	\$8,900	\$8,000	\$9,625	\$9,756	\$11,475	\$12,740	\$14,000	\$16,000	\$16,500
Direct Cost of Sales												
Direct Cost of Sales	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Individuals/Internet Customers	\$150	\$300	\$150	\$300	\$150	\$150	\$150	\$150	\$150	\$300	\$600	\$750
Referrals from Corp Accounts	\$150	\$150	\$0	\$150	\$0	\$150	\$0	\$150	\$0	\$150	\$150	\$150
Auto Dealerships	\$150	\$300	\$450	\$600	\$600	\$600	\$750	\$750	\$900	\$900	\$900	\$900
Corporate Housing	\$60	\$75	\$94	\$120	\$150	\$188	\$228	\$293	\$37	\$450	\$450	\$450
Property Management Companies	\$1,200	\$1,350	\$1,300	\$1,500	\$1,500	\$1,800	\$1,800	\$2,100	\$2,400	\$2,400	\$2,700	\$2,700
Subtotal Direct Cost of Sales	\$1,710	\$2,175	\$1,994	\$2,670	\$2,400	\$2,888	\$2,928	\$3,443	\$3,487	\$4,200	\$4,800	\$4,950