

Notes:

### Performance Matrix Business Advocacy

#### January 2024

Kelli Holt

Director of Business Advocacy

	January	February	March	April	May	June	July	August	September	October	November	December	Total
Quest: 2024 Savannah	Planning in process												1
Attend 4+ Gov Workshop(s)	5												5
Hold 4+ Equine Advocacy Meetings	0												0
4+ Partner Workshops or Roundtables	0												0
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New Director of Business Advocacy started on January 3, 2024



# Performance Matrix <u>Job Creation</u>

	TAKTILL													
		January	February	March	April	May	June	July	August	September	October	November	December	Total
	Retention Visits (200)	15												15
	New Jobs Created (400)	48												48
Bart Rowland,	Capital Invest. (\$40MM)	\$3												\$3
MEDP	Primary Employer Events	0												0
VP of Job Creation	Corporate Visits (2)	0												0
	HC Council/ NEXTworking (150)	65												65
	Comm. Touchpoint (120)	25												25
Erin Jones	HC Conf/ Trade Show(2-4)	1												1
Director of	HC Exc. Tier Touch Base/Mtg.(15)	5												5
Healthcare Development	Healthcare Insider (100)	0												0
	LLH Website Visits (2k/mo)	1,315												1315
	RFI's (10/yr)	2												2
Bryce	Trade Shows (6)	2												2
Morrison  Director of	Consultant & Project Updates	3												3
Business	Sites & Buildings Updated	✓												0



# Performance Matrix <u>Job Creation</u>

		January	February	March	April	May	June	July	August	September	October	November	December	Total
	Construction Academy meetings (12)	1												1
	Primary Contact Meetings (12)	0												0
Dean Blinkhorn	Assist With Shark Tank event (1)	0												0
COO/Director of	NEXTworking (400 students)	0												0
Talent Development	NEXTworking (70 businesses)	0												0
	Create 1 Biz Procurment Event	0												0
	Create 1 Biz Access to Capital Event	0												0
Evelyn	1-on-1 With (20) Lenders	4												4
Reyes VP, Business	1- on-1 With (20) Strategic Partners	2												2
Creation	Silver Springs Shores Occupancy (50)	TBD												0



# Performance Matrix Business Creation

	TARTITEROIIII													
		January	February	March	April	May	June	July	August	September	October	November	December	Total
	Technical Assistance (100)	20												20
	Avg. 1MC Attendees (45)	55												55
Tyler	2023 BC Programs (4)	0												0
LeCompte  Director of	2nd Stage Programs (15)	1												1
Entrepreneurship Services	GrowthBiz Prospects (12)	1												1
	PPBI Occupancy (min 50%)	86												86
	Community Outreach (x10 Month)	10												10
Jessica	OP Produced Content 1x12	1												1
Michel  Director of	Resident 1 on 1 (44)	5												5
Business Creation	Graduate 3 companies	1												1
	Technical Assistance (105)	21												21
	FastTrac Courses (2)	0												0
Cherrietta	West Ocala Touches (35)	8												8
Prince	Marion Oaks Touches (35)	7												7
Director of IMPACT	Silver Springs Shores Touches (35)	5												5



### Performance Matrix Business Services

		January	February	March	April	May	June	July	August	September	October	November	December	Total
	Exec Partner Visits - 175	20												20
	Exec Partner Events-10	Х												0
Tom James	Exec. Tier Introductions	8												\$8
Director of	Sponsorship Rev - \$260K	\$36,000												36000
Executive Engagement	CEP 101 200 Attendees	19												19
	Tuesday Talks 18 Attendees	24												24
	Friday Talks 18 Attendees	54												54
Andrea Bailey	LOM 30 Participants	30												30
Director of	LOMY 33 Participants	33												33
Business Services	EM Breakfast 380 Attendees	436												436
	Partner Events (75)	8												8
	Partner Meetings (100)	26												26
Jess Schultz	Business After Hours (4800)	482												482
Senior Director	Upgraded Partners (\$100k)	2500												2500
of Partner	Other Events (540)	120												120



# Performance Matrix Business Services

		January	February	March	April	May	June	July	August	September	October	November	December	Total
	BCEP New Partners	9												9
	BCEP Cold Calls	300												300
Joe Reichel	BCEP New Partner Meetings	9												9
Director of	BCEP Sponsorship	\$6,000												\$6,000
Belleview CEP	BCEP Partner Upgrades	0												0
50	Partner Touches	98												98
	Retained Partners	8												8
Jim Pazda	Partner Upgrades	4												4
Director of	Value of Upgrades	\$ 37,500												\$ 37,500
Business Services	Partner Events	26												26



### Performance Matrix Business Services

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		January	February	March	April	May	June	July	August	September	October	November	December	Total
	New Partners This Month	20												20
	Cold Calls	145												145
Chris	New Partner Meetings	30												30
Blankenship Partner	End of First Year Renewals	9												9
Relations Associate	Partner Upgrades	0												0
	New Partners This Month	3												3
	Cold Calls	0												0
	New Partner Meetings	0												0
Ron Hipner Partner	End of First Year Renewals	2												2
Relations Associate	Partner Upgrades	0												0
	Partner Visits	22												22
	Partner Calls	37												37
Matt	Partner Videos	17												17
Partner Success														
Wilkerson  Director of	Partner Videos	17												17



# Performance Matrix Business Support

		January	February	March	April	May	June	July	August	September	October	November	December	Total
	Past Due Outreach	39												$\sqrt{}$
	Verify Partner Billing	$\checkmark$												V
Kimberly	Renewal Report	$\checkmark$												V
Langley	Pay All Invoice	$\sqrt{}$												$\sqrt{}$
Executive Assistant														$\sqrt{}$
	Monthly Invoices & Statements	<b>√</b>												$\sqrt{}$
12: 20	New Partner Packets (250)	18												18
Donna Marseco	Relocation Packets two Week (80)	7												7
Director of	Renewal Packets (720)	76												76
First Impressions	Touchpoint Postcards (1,000)	79												79
	Ensure we have receipts/support for all credit card charges Resolve Partner Billing	$\sqrt{}$												
	Discrepancies (Weekly Basis) (50)	5												
Amie Marsh	Verify that all bills recorded in the accounting software	$\sqrt{}$												
Director of	Record credit card charges (Weekly Basis) (50)	5												
Finance & Operations	Operational Meetings (50)	4												



### Performance Matrix Business Support

		January	February	March	April	May	June	July	August	September	October	November	December	Total
	Grant Funding Secured (G:\$100k)	О												
	Submitted Grant Apps (Goal: 12)	1												1
Natalie	Income (Goal: \$250k)	TBD												-
McComb, CFRE	Foundation Visits (Goal:36)	3												3
VP Foundation for CEP	Podcast Downloads (Goal: 800)	79												79
	Weekly Buzz Views (Goal: 32,000)	2885												2,885
	CEP on the Scene Views (Goal: 10,000)	480												480
Sullivan Hogan	POV Views (Goal: 20,000)	1440												1,440
Director of Video Communications	A Closer Look & Leading the Way View (Goal: 5,000)	N/A												-
	Additional Internal Videos (Goal: 20)	1												1
	FB New Follows (Goal: 1,200)	155												155
	Facebook Posts Reach (Goal: 425,000)	55,166												55,166
Kelly McAtee	LinkedIn Posts Reach (Goal: 80,000)	10,500												10,500
Director of Social Media &	Email Opens (Goal:150,000)	26,698												26,698
Marketing	Website Reach (Goal: 95,000)	10,217												10,217



### Performance Matrix Business Support

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		January	February	March	April	May	June	July	August	September	October	November	December	Total/Avg.
	Increase Facebook Followers (333/mo)	409												409
	Market Vendors (336/mo)	332												332
Dawn Bowman	Pavillion Rentals (36/year)	6												6
Director Ocala Downtown	Self-generated ODM events (12/year)	0												0
Market	Provide Vendor Workshops (2/yr)	0												0