NeuroAthlete

Spring 2021 UCCS BI Team: Final Client Report

Clients:

Dr. Grove Higgins, Mike Clayton, and Patrick Marques

Sean Geismann • sgeisman@uccs.edu

Hailey Clark • hclark8@uccs.edu

Dominic Leazer • dleazer@uccs.edu

Jacob DeMeyer • jdemeyer@uccs.edu

Sofia Beran • sberan@uccs.edu

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Executive Summary

The Bachelor of Innovation is a comprehensive degree program at University of Colorado at Colorado Springs that teaches students how to innovate and work on cross-disciplinary teams to support actual client projects. Clients are outside organizations that need help with certain tasks. Working with a BI team, the client receives a team lead followed by students that will assist the client in achieving goals for their company.

The NeuroAthlete Clinic, a chiropractic and personal training clinic based in Monument Colorado, has asked the BI team to advise and aid them in creating a business structure for a new startup. NeuroAthlete has created two new products: BrainShield Protection Program, and Sports Vision Enhancement Program. These are designed to be online preseason training programs. NeuroAthlete are also under contract to produce and sell MedFit products like Stroke Recovery Specialism, Joints of the Human Body Webinar Sequence, and Gait Mechanics.

The team constructed three primary documents as formal analyses of the brand to show market validity. The first document created was a *situational analysis*, also known as a (Strengths, Weaknesses, Opportunities, and Threats) SWOT analysis. The shared threat from the analysis is the lack of credibility in the current brand, and a strength of having a lack of comparable products. A *competitive analysis* was constructed to help NeuroAthlete’s new brand show their competitive advantage, and a subsequent *opportunity analysis* was used to find potential market entry points.

The team discussed the necessity of a website or platform to display their new business and to market their products. This included an investigation of different domains to find their individual capabilities and pricing. Research found that the established site, Thinkific, seems the best choice based on price and usability. Thinkfic is a third-party education program hosting site.

The team researched to find three large target markets that would be possible to reach on a large scale with a small marketing budget. The three groups named were adult sports, youth sports, and military. The team also conducted research polls through questionnaires designed for the target market, further expanding market research, and understanding.

Statistics were gathered and a breakdown of prices was created for different promotional platforms and supplied insight on a price breakdown for promotional costs on social media platforms. Their final recommendation is for NeuroAthlete to use the marketing guide as a tool to plan and implement marketing strategies.

The BI team handled modeling NeuroAthlete’s new business. The customer value proposition supplies guidance on NeuroAthlete’s new customer benefits, values, and a mission statement. After investigating the legal viability of an online course, the team helped NeuroAthlete develop a pricing model for their product and how their income from projected sales would help them diversify. With the combination of these materials guidelines for deciding a business structure along with personal recommendations was provided.

Statement of Accomplishments

The team worked to create a marketing plan that would lead into a formal business plan. The business plan was based on the business structure that was the best fit to the target market. Through this work, formal documents were created to hold the research together. This knowledge allowed the team to accomplish several objectives.

Objective: construct the market analysis documents.

This work was divided into two sections, one which contains research about the new brand’s general market segmentation and another that has research about industry standards, competition, and barriers for entry. With the combined research, it was compiled into the competitive analysis and situational analysis located in Appendix B. This objective includes the segmentation research (Market Plan, Section 2, 12/8/21).

Objective: Define the target market.

The team aimed to identify gaps within the market that are not monopolized by an industry-dominating competitor. These gaps can be utilized to supersede the barriers of entry, and after the brand becomes an established product and service provider, another market analysis will be performed to test the market. After the gaps within the market were identified, specific organizations and people within them were selected as initial targets for product testing and reviews as well as initial distribution.

Objective: Develop a presentable feedback strategy.

After identifying the target market, the team began to research and reached out to members of their respective market. The team constructed full-length and short-form surveys for potential customers and delivered them to NeuroAthlete for use as product rollout approaches (Market Plan, Sections 8 and 9, 12/8/21).

Objective: Finalize the marketing plan.

The team compiled insights and recommendations into a marketing plan document provided in as an external document named *Marketing Plan*. A ten-parted Marketing Plan compiling of primary and secondary market research lead to conclusions regarding direct and indirect marketing methods. This document was presented to NeuroAthlete.

Objective: Conceptualize and formalize business structure recommendations.

The completed documents suggested specific business structures that would complement the brand based on competition and industry standards. The recommendations were compiled and can be accessed in Appendix F.

Objective: Formulate primary research recommendations.

The team used the target market research to make conclusions. These findings needed to be proven with evidence from the physical target market. To confirm the hypotheses, an in-depth focus group questionnaire (Market Plan, Section 9, 12/8/12) and a simplified poll (Market Plan, Section 8, 12/8/12) was constructed to guide the client to engage potential customers.

Recommendations and Innovation Discussion

Recommendation 1: The most pivotal recommendation is for the NeuroAthlete team to use this report as a guide to build the foundation of the new business. This report's supporting documents, Appendix C, Appendix D, Appendix E, Appendix E and Appendix F give guidance on Feedback Structure, Social Media Guide, Email Marketing Guide, and Non-Profit Guide respectively. NeuroAthlete should also use the external *Market Plan* document as a specialized guide to make decisions.

Recommendation 2: Use the options in the domain research (Market Plan, Section 7, 12/8/21) to decide on a platform to build the new business. The document includes advantages and disadvantages to various hosting platforms and social media sites. The BI team recommends that the NeuroAthlete team should build their final platform decisions after they host focus groups (Market Plan, Section 9, 12/8/21) and obtain the primary market research. This is because the domain research is based off benefits that come with each platform for the business but does not specify consumer preferences for the particular target market. Certain platform types should be confirmed after talking to actual specific individuals in a market. It will also help determine whether or not the NeuroAthlete's new education brand should produce their product on a third party hosting platform, develop it as a built-in website, or make it available on a mobile device.

Recommendation 3: The NeuroAthlete team should use the secondary research (Market Plan, Section 1, Section 2, and Section 3, 12/8/21) as a starting point. The hypotheses drawn in the secondary research documents should be tested when interviewing the target audience following the Focus Group Guide (Market Plan, Section 9, 12/8/21) and the Poll Questions Guide (Market

Plan, Section 8, 12/8/21). Each of these sections provides example questions and a guideline to lead an interview. This recommendation will help confirm whether the target markets identified should be confirmed. It will also help confirm the validity of the branding recommendations (Marketing Plan, Section 4, 12/8/21).

Recommendation 4: The BI team suggests that NeuroAthlete apply for a future BI team. This semester's group was responsible for laying the groundwork for the business, implementation should be the priority. It is suggested that NeuroAthlete apply for more teams in the future. Once a media and platform strategies are chosen from the options, a new BI team can help create the online content. A new BI team can also help build onto the branding strategies and logo creation.

Recommendation 5: The BI project team recommends that NeuroAthlete considers filing as a non-profit as opposed to the traditional limited liability company, (LLC). In the Non-Profit Guide in Appendix F, further information can be found explaining the process in detail to ensure clients understand the nuances of running as a non-profit organization, (NPO) in ways resembling their existing LLC knowledge. With this recommendation, the team would also like to mention that future BI teams can assist in these processes if this structure is chosen.

Recommendation 6: After evaluating and creating a customer value proposition for NeuroAthlete's new business, the BI team created a mission statement and values that the client should use. The company's new mission statement should be "Our mission at NeuroAthlete is to create unique learning opportunities through innovation, ingenuity, and originality." The value statement that NeuroAthlete should also reflect is, “We value our customers’ health and growth in sport and lifestyle.” These statements should be used on the front page of a website or app.

Conclusion

The BI team and the NeuroAthlete Clinic collaborated to build a business structure for new online-based education training programs. It was identified that the types of consumers interested in the new brand are youth and adult sports decision makers and the military. Those findings were confirmed with the primary market research documents via focus group questionnaires and polls. Marketing strategies were developed to cater to the three target markets. The documents compiled in the supporting materials are designed to be a guide for the client to build the foundation of their new business.

Supporting Materials

Appendix A: Project Charter

Name of the Project: NeuroAthlete

Name of the Sponsor:

Dr. Grove Higgins- Practitioner and head of the program

Pat Marques- Master Trainer

Mike Clayton- Communications and Sporting Expert

Purpose of the Project: The Purpose of this project is to create long-term value for the NeuroAthlete Clinic and their startup education business. NeuroAthlete has asked the BI Team to help construct and advise the structure of the new business. The purpose of the advisory team is to create obtainable objectives for the clients, give insight, and supply a guide on how to market the new products.

High-level Project Description and Boundaries:

The NeuroAthlete Clinic based in Monument, Colorado has asked the UCCS Bachelor of Innovation to advise and aid them in creating a business structure for a startup business. The UCCS BI has teamed up with NeuroAthletete structure the new business. NeuroAthlete has created two new products: BrainShield Protection Program, and Sports Vision Enhancement Program. Neuroathlete are also under contract to sell MedFit products like Stroke Recovery Specialism, Joints of the Human Body Webinar Sequence, and Gait Mechanics. Each product has market potential, but NeuroAthlete does not have the skillset to implement and market products to the public.

The BI team will handle developing a marketing plan using an integrated marketing communications viewpoint. The NeuroAthlete and BI teams will research using outlines like an industry analysis and competitive analysis. A Strengths, Weaknesses, Opportunities, Threats model (SWOT) will be used to assess market potential. The two teams will use the findings to generate secondary market research to define target markets. Once the market is outlined, marketing position strategies will be developed by the BI team and NeuroAthlete. This will be a "how-to" guide on different mediums of direct and indirect marketing strategies.

Once the marketing plan has been constructed, the BI team will begin outlining and consulting NeuroAthlete on how to begin filing their business. This will include consulting the client with a checklist of needed paperwork, tax statuses, financial planning, revenue modeling, and a customer value proposition. The BI team will follow will use the business model canvas as a guide.

The UCCS BI team and NeuroAthlete are scheduled to have 13 weeks to complete all the following large objectives. Each week has been lined up and objectifiable with specific tasks to complete. As client expectations and emphases change, the BI team will be prepared to pivot. The BI team will not be dealing with external direct or indirect marketing, as the focus is centered towards building NeuroAthlete's brand, consulting weekly, and guiding the new business towards equitable decisions.

Objectives and Success Criteria:

Objective 1: communicate efficiently throughout partnership.

Success criteria: the UCCS BI team and the NeuroAthlete team will meet on an online calling platform at least once per week. The two teams have agreed to meet consistently on Thursdays at 12:15pm. If members of either team are not available to meet a certain week, communication will be emphasized. This objective will require the consistent usage of email strings with follow-up emails that will have attached documents as needed.

Objective 2: lead and inspire the NeuroAthlete team to create a strong brand name.

Success criteria: the team will need to research different methods of spreading brand equity. The team will also communicate the research objectives and findings with the NeuroAthlete team as it will guide the new brand towards making beneficial decisions for.

Objective 3: create a guide that NeuroAthlete can use for future decisions.

Success criteria: The BI and NeuroAthlete teams need to specify and collaborate on goals that are prioritized. Once the teams have a similar mindset on what is to be completed, the BI team can use research-based methods to create a guide for NeuroAthlete into their future.

Objective 4: create marketing strategies

Success criteria: The BI team will consult with the NeuroAthlete team to supply options on multiple marketing fronts. Recommendations will be made for direct and indirect marketing initiatives. Success on these recommendations will be decided well after implementation.

High-level requirements:

Requirement 1: The marketing strategy will be developed in Week 6 by the project team with the information gathered in the previous weeks of assessment. This strategy will be developed in the form of a physical document accessible for the client and team to alter as needed.

Requirement 2: direct and indirect promotional recommendations will be specifically outlined with a how-to guide that the client can use at their disposal.

Requirement 3: Define target market-or markets- based on primary and secondary market research techniques.

Requirement 4: The final business plan will be developed in a rolling document over the project frame by the entire team. This document will be ready to deliver or present to the clients in week 12 of the project.

Assumptions:

Assumption 1 - The client continues contact with the team until December

We assume the client will remain interested in weekly meetings for the rest of the partnership.

Assumption 2 - Client has little prior knowledge of legal documentation and process of a start-up business

This assumption highlights the necessity for clear language and proper guidance from the team to the client.

Assumption 3 - The BI team will not have access to prior consumer information.

The third party that NeuroAthlete has previously licensed their products to is unlikely to share consumer information.

Assumption 4 - The BI team has planned to meet twice per week.

This assumption pertains to each team member and client staying consistent and attending each meeting.

Assumption 5 – Each document within the business plan is assumed to be completed.

Constraints:

Constraint 1 – Individual team members' schedules—along with the online nature with the course—conflict with prospects of meeting times and coordinated work efforts.

Constraint 2 – The product line NeuroAthlete is forming their business around is unfinished.

Constraint 3 – NeuroAthlete does not have a finalized marketing budget.

Constraint 3 will depend on NeuroAthlete's flexibility with their buget.

Constraint 4 – The BI team has members living in different time zones.

This constraint assumes obstacles on scheduling conflicts.

High-level Risks:

Risk 1 – Specificity

Team members do not have access to the product line—being still in development. If the BI team cannot fully conceptualize the end product, then the marketing strategy may prove ineffective.

Probability: Medium

Impact: Medium

Planned mitigation actions – Many related products, as well as limited access to the prototypes, have been delivered to us by the NeuroAthlete. These will serve as a reference point for us to construct the project around. Communication between the BI team and NeuroAthlete will also play a role in mitigation.

Risk 2 – Domino-like nature of the project

The BI team will construct a finalized business plan by the end of the semester. If any given task cannot be completed due to external factors, then the business plan will be incomplete at the end of the project.

Probability: Medium

Impact: High

Planned mitigation actions – A detailed schedule has been crafted for us to follow, including a visual aid using the "AGILE" method for clear readability. This schedule allows excess time to most areas of the project in case of circumstances where a task is postponed.

Risk 3 – Finality

The product line finishing development will inevitably decide the final shape the company will take, which is scheduled to occur after the end of the semester. If the finished product line varies from NeuroAthlete's and our current expectations, then the constructed business plan will be obsolete.

Probability: Low

Impact: High

Planned mitigation actions – Communication between us and NeuroAthlete is a priority as we develop the separate sides of this company from the base; consistent check-ins on the state of product development as well as a required approval on most documents before marking as complete by us will serve as mitigation.

Summary Milestone Schedule:

Milestone 1 – Confirm Market Plan with client

Research on the target market, channels of distribution, and competitive analysis will be concluded. Validation and conclusions will be drawn by the BI team for NeuroAhlete. Market segments will be defined. Positioning and feedback structure to be presented.

Deadline: Tuesday, November 4th.

Milestone 2 – Confirm Customer Value Proposition

The Customer Value Proposition (CVP) uses a creative technique to generate ideas on the new company's mission statement and values.

Deadline: Tuesday, November 18th

Milestone 3 – Business Model Canvas Complete

The business model will be complete with sections including a customer value proposition, storyboarding scenarios, financial model, and revenue model.

Deadline: Wednesday, December 15th.

Milestone 4 – Compile Project and Create Final Pitch

A final pitch video as well as a write-up will be compiled and presented to NeuroAthlete. They will have access to all the information we supply them. It will also supply recommendations for the client for the future.

Deadline: Wednesday, December 15th.

Stakeholder List:

Stakeholder 1- BI Consulting Team

The BI Team sees opportunities to gain industry experience. The team also has stakes in their performance because of the class requirement to graduate with a Bachelor of Innovation.

Stakeholder 2- NeuroAthlete Clinic

NeuroAthlete's future sales and success has a direct relationship with the output of the project.

Stakeholder 3- MedFit

MedFit's overall value will increase with a successful marketing campaign carried out by the project. MedFit is a company that contracts their products to NeuroAthlete to sell.

Stakeholder 4- EPIIC Venture Attractors

Dr. Terry Boult and the EPIIC Venture Attractor team will benefit from a successful project as NeuroAthlete was selected as one of their promising startups.

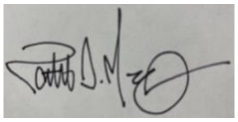
Stakeholder 5- Competitors

Competitors have a stake in the performance of the project as its success will add a new competitor to the market.

Stakeholder 6- UCCS Faculty

The UCCS Faculty holds stakes in our project because if the project is considered successful, the NeuroAthlete team will be invited to apply for another UCCS BI Team.

Approvals: By signature below, the project team and the client agree to this project charter:

Patrick Marques 

___________________________________ __9/22/21___________________

Client Date

Mike Clayton 

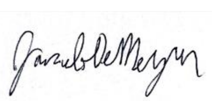
___________________________________ __9/22/21___________________

Client Date

Hailey Clark 

_____________________________________ _9/21/21___________________

Team member Date

Jacob DeMeyer 

____________________________________ _____9/21/21_________________

Team member Date

Dominic Leazer 

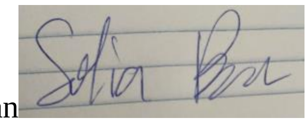
_____________________________________ ______9/21/21__________________

Team member Date

Sean Geismann 

________________________________   ___9/22/21________________

Team member   Date

Sofia Beran

________________________________   __9/22/21________________

Team member   Date

Appendix B: Analysis Documents

Competitive analysis

Competition in Industry

1) National Federation of State High School Associations (NFHS) partnered with Center of Disease Control (CDC).
    a) 'Heads Up' Youth Sports Online Concussion Training
        i) Provided by CDC
        ii) Includes certificate of completion and "additional resources"
        iii) Completed Annually
        iv) Separate course tailored specifically at students/players
2) Carrick Institute
    a) Concussion course/mild traumatic brain injury (mTBI) course
        i) Includes certificate of completion
        ii) Designed as higher education 'collegiate' course, not just training program
        iii) $7,200 full course, 1 of 6 modules available for $1,600 each
        iv) Live streams from on-site location in Florida
3) Neurotraining Academy (NTA)
    a) Free e-seminar available from website

Potential of New Entrants into Industry

1) Due to high barriers of entry created by current concussive guidelines and legislation, the potential of new entrants into industry is low.

    a) Implies that *entering* industry is low.

Power of Suppliers

1) The NFHS & CDC—primary competition
    a) Both helped to construct current concussive guidelines; a joint-made program is needed for many sports organizations.
    b) The program “Heads Up” is offered for free
    c) The program is needed for many sports organizations
    d) The program requires renewal once annually.
    e) New programs require approval from the state youth activities board, which is managed by NFHS.
2) Neurotraining e-seminar is offered for free.
3) Carrick Institute course targets healthcare and other medical professionals over coaches and trainers.

Power of Customers

1) The customers have the power to make demands/influence prices:
    a) Other comparable products are available for free.
    b) Customers would only buy or use the product once annually (typical certification-renewal period).
    c) The product market is large enough to supply alternatives if customer satisfaction is not achieved.
    d) Assumption – the customers are well informed as similar training is needed for all US sports administration.

Threat of Substitute Products

1) The current leading program is widely accepted as standard.
    a) Program is offered for free.
    b) Program is required by law.
        i) Other substitutes require approval by sources linked to the current leading program.

Situational Analysis

Background

The CDC said in 2019 that there were nearly 61,000 TBI (Traumatic Brain Injury and Concussion) based deaths. The age groups most affected by TBIs are from ages 15-19 and 65 plus. 80% of TBI injuries are classified as mild head injuries. The male to female ratio for concussions is 2 to 1. TBIs are a high-risk factor when dealing with Post Traumatic Stress Disorder (PTSD).

The NeuroAthlete Brain Shield program is designed to mitigate these risks. The usage of cervical mobility and strength that Brain Shield offers stands out as an exciting new tool that people can buy online and implement in their programs and individually. The program has been developed by industry professionals:

Dr. Higgins- Chiropractic and anatomy specialist

Coach Pat Marques- Exercise therapy specialist and training program specialist

Coach Mike Clayton- Curriculum development specialist.

Together, they have had a successful past while speaking at the National Strength and Conditioning Association and have the number one selling seminar at the conference. They currently promote and sell other related programs like the Youth Progressions and Mobility Training Program.

NeuroAthlete is a continuous growing education team that is developing more programs aimed at helping society. One program close to completion is their Sports Vision Training, which will supply professional knowledge and instructions on how to increase elements like depth perception and eye movements.

External:

Strengths- The product is beneficial to society, so it will gain unconditional support.

Weaknesses- public feeling towards concussion prevention may be negative considering there is no evidence that such programs are effective. Many coaches and parents may not be able to afford the program. Gaining intellectual property on the program.

Opportunities- There is not a current program that would supply a similar service to consumers. The market for these products is large and untapped.

Threats- the threat of substitute products, like improved helmets, and similar programs. As trends of contact sports become more conservative, the influx of new rules and regulations poses a threat because it is possible that concussions will be mitigated in the future.

Internal:

Strengths- The NeuroAthlete is already an established clinic found in Monument, Colorado. The company has a basis and current client base that could lead them to future sales with their new business venture. Their ability will prove pivotal when supplying a basis of information on the matter to clients.

Weaknesses- The efficacy of the program is unproven. The lack of business and sales experience will require the NeuroAthlete clinic to seek external guidance and eventually will lead to a cost.

Opportunities- the knowledge and ability of the NeuroAthlete team will develop meaningful products in the future. If the first products do not prove profitable, new opportunities will. The support base is also strong within supporting agents like the UCCS Bachelor of Innovation and the EPIIC Venture Attractors.

Threats- The new business venture will refocus the NeuroAthlete clinics' attention from everyday chiropractic attention to more business and sales based. There is currently no marketing budget for the launch of the innovative programs. NeuroAthlete programs face the threat of no public awareness, leading to poor sales.

Why is it Relevant?

The incremental increase in concussions in the US each year is creating a market for prevention programs. The programs are developed by field professionals and the efficacy, while not officially proven, will have long term benefits for the client. The current environment for potential clients is in need for an alternative to increased regulations and more expensive equipment.

Purpose of This Document

This document serves as an introductory to the marketing plan. It outlines how NeuroAthlete's new products, Brain Shield, and the Vision Enhancement Program, will serve a purpose in consumer's lives. This document starts the dive into how the programs will affect the community and the potential benefits that consumers will perceive.

Appendix C: Feedback Structure

Customer Feedback Structure

Purpose: measure effectiveness of product placement and effectiveness. This section supplies suggestions for NeuroAthlete's new brand to measure customer satisfaction and the effect of the marketing program. Ideas for feedback structure:

1. **Follow up email**
    a. What should it include?

    The follow-up email should include other information/links to other information about the program. It could include a link to a google poll, or a service like survey monkey. It should inquire to see if the user is interested in other products they may enjoy or want to use. The goal of follow-up email feedback is to set up customer relations by creating a line of communication. The follow up email should also include an initiation to follow the Facebook and Instagram accounts. This can include an invite to specialized Facebook groups. Feedback via email will help remove the chances of any extraneous data

    b. Structure an example.
        i. Hello customer (or customer name if known),

    "We would like some feedback on the brain shield product you purchased. Here is a link to a brief survey to help us improve user experience *link*. Thank you for your time."

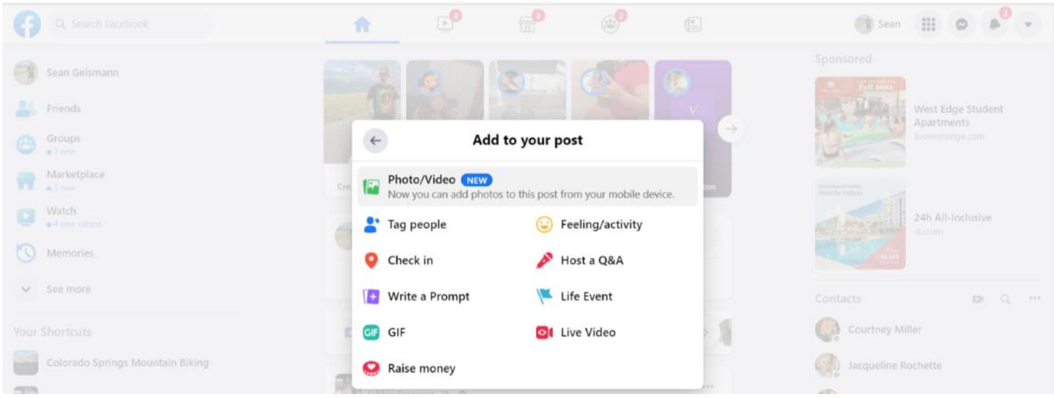
“After using the brain shield product, how would you rate it on a 1-5 scale. 1 2 3 4 5 (each number is a hyperlink so you can record their answer, and it takes less time for the user than the previous email)”

The image above shows the three types of follow-up emails, and what they help to achieve for your company.

When the product is initially released and NeuroAthlete has their first 30 (or so) users, feedback is necessary. There should be a small incentive for the first users of the product to leave a review and talk about their experience. It will help clarify if the product was effective or not, as well as finding whether the target market that used the product is valid or not. This will end up saving money if reviews are bad. It will also help in deciding the most valuable parts of the program and whether the platform used for it was effective or not.

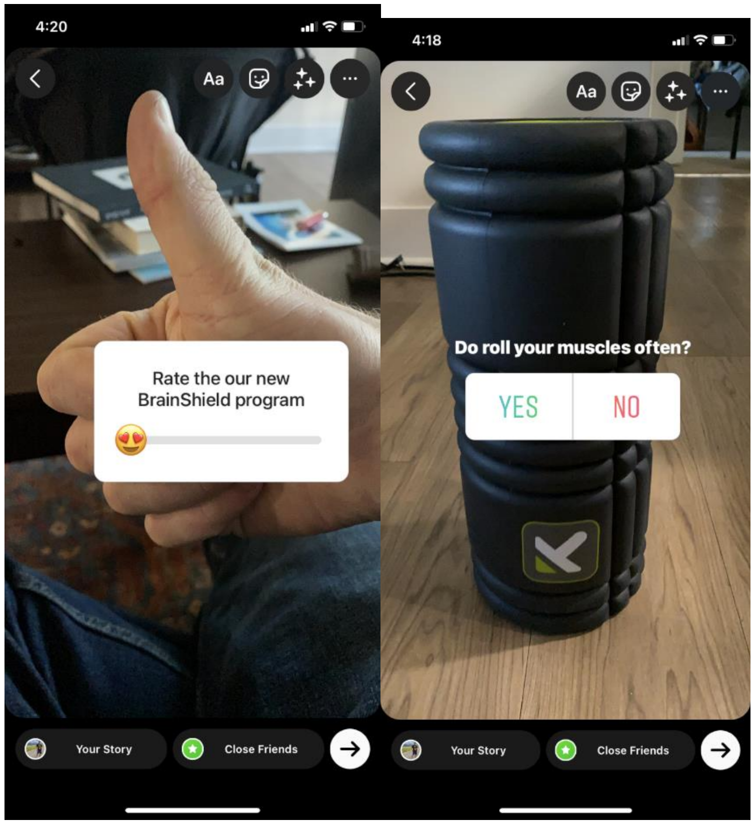
2. **Social media interactions**

Facebook



The screenshot above lists the options for social media interaction on Facebook. The best way to gain feedback from existing customers/product users on social media is to create interactive content like polls or a Q&A. Polls on Facebook are only available when asking a group of people. Q&A is a better form of feedback. The post can ask “Talk about your experience with the BrainShield program for a chance to win a t-shirt." Q&A is nice because of the open-ended nature of the message. Reference the external document, Marketing Plan in Section 8, for a how-to guide.

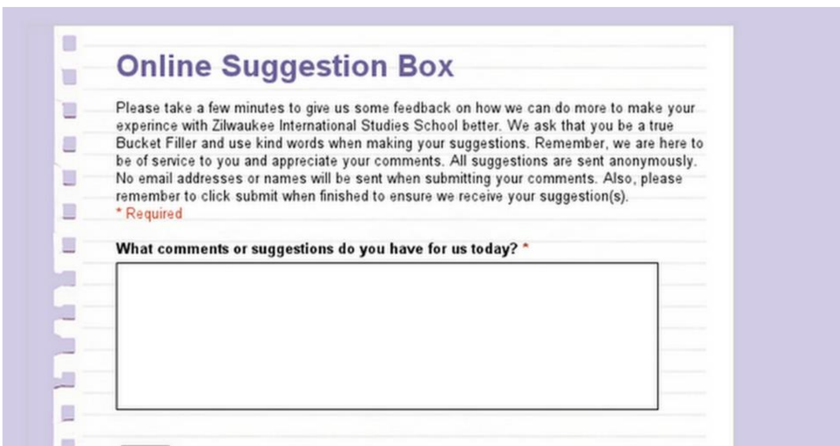
Instagram



All three images above are examples of feedback efforts that can be carried out via Instagram. These options are temporary posts on stories. Stories disappear after 24 hours, so it is good for a brief period. There can either be a poll like the first image, or a suggestion/feedback box like the second and third images. It can be assumed that there will not be many respondents until NeuroAthlete’s new brand has a large social media outreach. However, posts like these are designed to be a fun and interactive way for viewers to give insight. They can also be anonymous, so truthful responses are more likely. The polls should be brief questions like the screenshots above. One downside of posting polls on the general Instagram account is that anyone can answer the questions, even if they have never used the products before. Poll questions on Instagram should be more general towards the brand and less product specific. Overall, polls are the best way to gain social media feedback for the brand, but it poses risks when trying to gain product-specific feedback. For a more-depth “how-to” tutorial, reference Appendix D.

3. Suggestion box

This would most likely be put at the end of one of your videos, or at the bottom of your website to try and incite the user to reflect on their experience and give you direct feedback from users. Below is an example that explains easy directions as well as what you are trying to achieve by completing the suggestion.



What should it include?

A suggestion box should include enough space for adequate feedback (200 characters or so). It may also include a rating system tied onto the suggestion for more clarity. Take amazon reviews for example, without a rating system some of the reviews do not give great feedback on their opinion of the product because of wording etc. This will carry out direct customer feedback in a more thought-out manor versus just a rating system which can be open ended. A benefit is that the customer has the option to give suggestions not just feedback

4. **Online course evaluation survey**

This survey should be a brief 3-5 questions in length. It should ask questions on the effectiveness of the program on a rating scale. It should also ask questions about perceived value of the program they just completed. A questionnaire should be specific questions. Answers to questions should include strongly disagree, disagree, agree, strongly agree, and neutral. This will help gain understanding of where the customer stands in terms of satisfaction and effectiveness. The question should not make the polltaker think hard. Straightforward questions are key.

Example questions:

1. Did the BrainShield risk mitigation program: exceed expectations, meet expectations, not meet expectations.

2. would you recommend this product to others? strongly disagree, disagree, agree, strongly agree, neutral.

3. Would you consider this education as innovative and new? strongly disagree, disagree, agree, strongly agree, neutral.

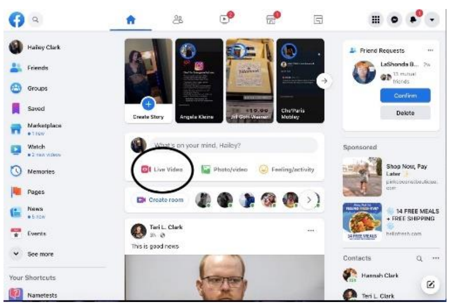
Using feedback will help to create better understanding between you and your clients. Using said understanding will allow you to adapt your product or company towards your customer's needs.

Appendix D: Social Media Guide

Facebook (Computer or Phone)

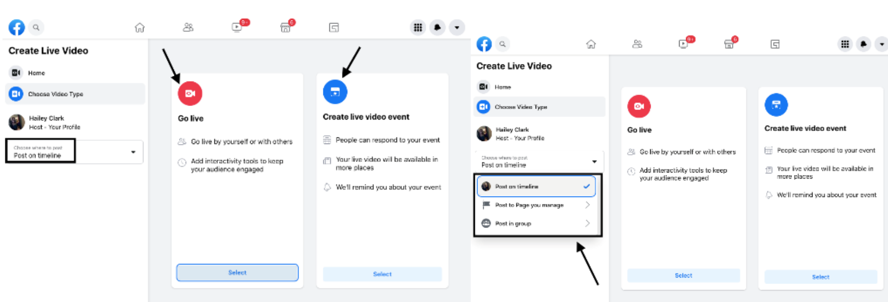
Live:

1. First you go to Facebook, if you don't have an account sign up its completely free
2. Once you are on Facebook right at the top of the page you will click "Live Video" and it gives you the option to go live by yourself or with others

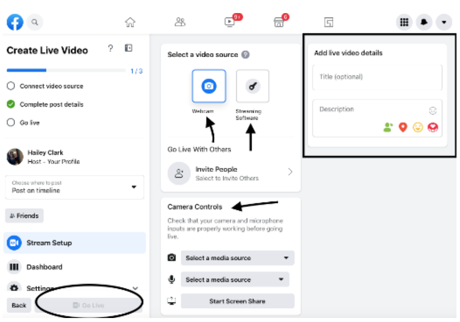


   a. Obviously for what you guys will be doing you will want to go live with other people as a more interactive video to do this you will look at the left-hand side of the page and click on "Choose where to post" and it will give you the option to post on your timeline, post to a page you manage or post in a group which you will click the last option and then choose your group that you created earlier

   b. You can also create live video events so that it is scheduled, and people can respond to your event and get reminders for when they will happen

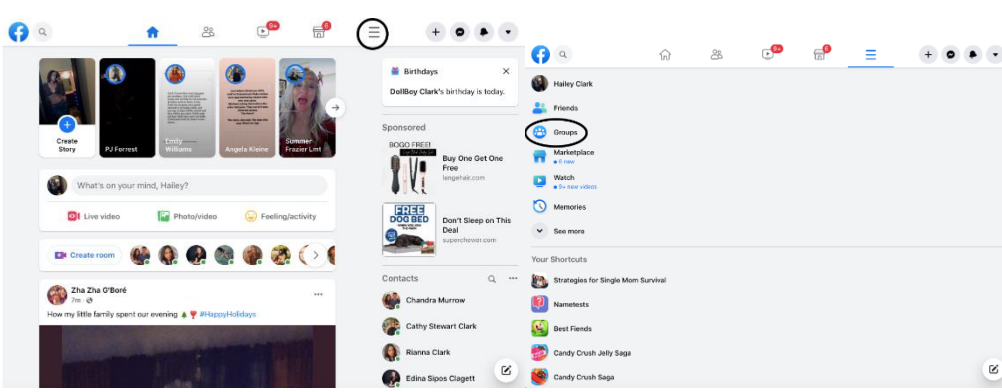


3. You will then select a webcam or streaming software for your video, add a description for the video, select where to post the video and set up your camera controls
    a. It is your preference
    b. Optional is to add a title
4. Your last step would be to go live
    a. In a live Facebook video, you will be able to have people comment and send out emojis reacting to your video
        i. You can respond and interact with your viewers as well

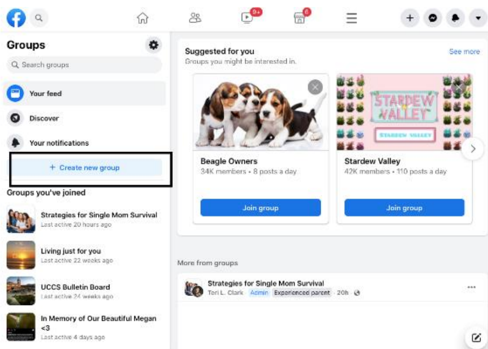


Group:

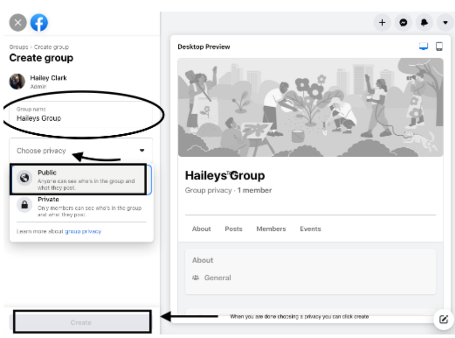
1. You are going to want to go to Facebook and when you log in you will be on the homepage; you will want to click on the three horizontal lines that will pull up a drop down menu with options and you will want to click "Groups"



2. Once you get there, there will be an option on the left-hand side that says "+ Create new group" and you will click that
    a. Under that will show what groups you are already apart of if you are already in some other groups



3. Once you have clicked on create new group it will ask you to put in a group name, choose the privacy, and invite friends which is optional
    a. If your privacy settings are public anyone should be able to join this group, if it is private you will want to invite people to join your group but our recommendation is making it public so people from anywhere can get the information you are trying to share.

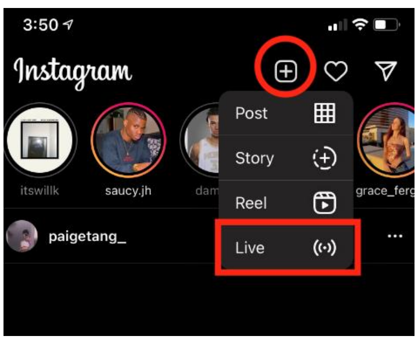


4. Once you have made this group you will be able to create live videos for the group itself

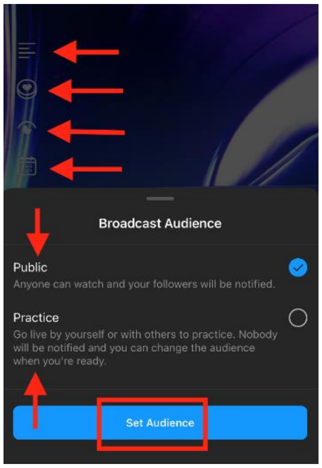
Instagram (Done on a phone)

Live:

1. First you will login or create an account on Instagram and it will bring you to the homepage
2. In the right-hand corner you will see a bunch of tabs and you will want to click the plus sign that is in a box to start your live

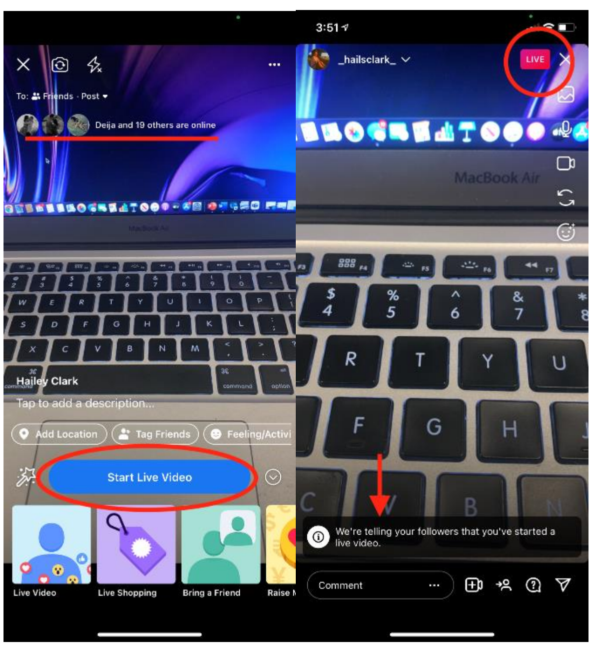


   a. It will give you the option to post a story, make a regular post, post a reel (a short video), or go live which you will then click
   b. This will bring you to the startup page of a live on the left-hand side it will give you a few different options like adding a title, selecting a fundraiser for the live where you can raise money, your broadcast audience, and setting a time for your live



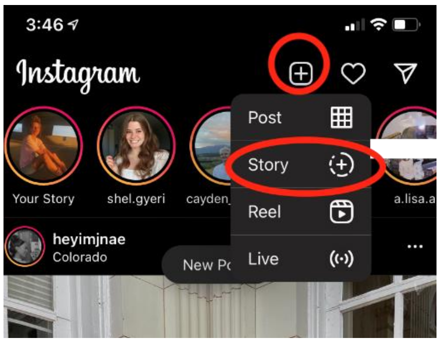
i. The broadcast audience button will give you the option to go live publicly for all your followers or practice which will give you the option to practice going live so you can get the hang of it

c. At the top of the screen it will show you how many of your followers are active so you can go live at the best times

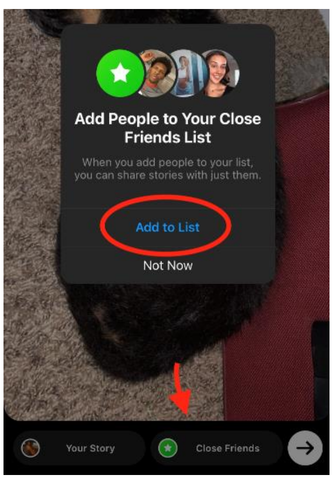


Close Friends (a story for selected people):

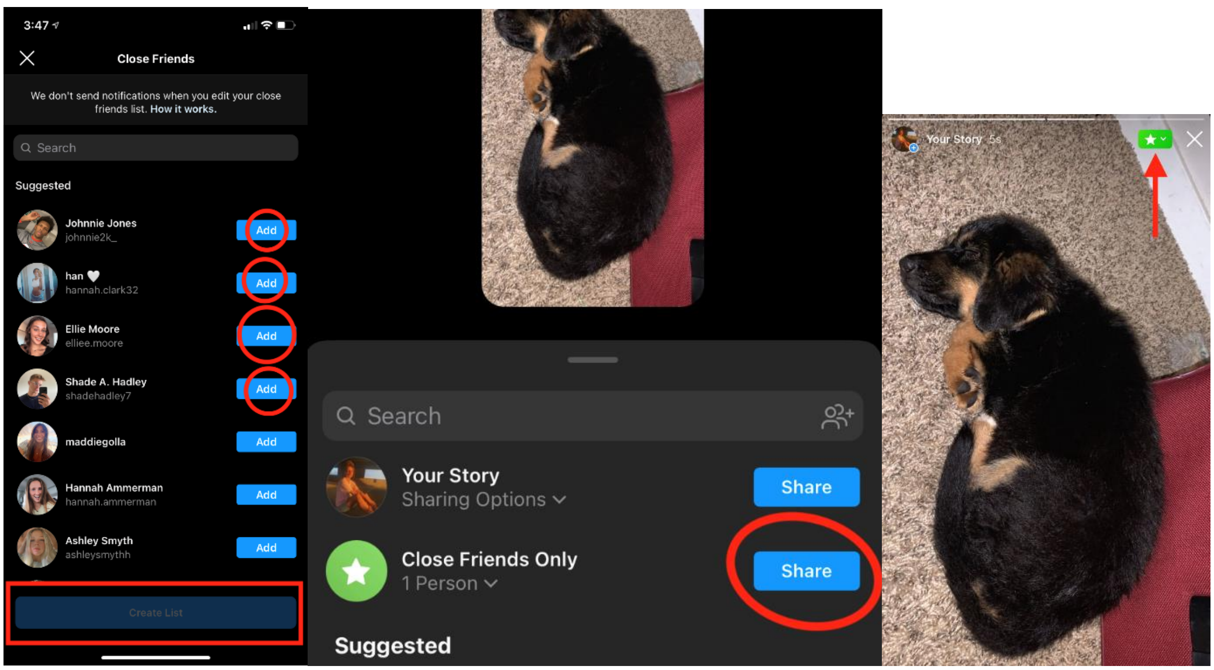
1. First you will get onto Instagram and select the plus sign in a box sign at the top right section of the homepage
2. You will then want to create a story whether it be a video or picture



3. Then once you get past which video or picture you want to post it will give you two options on the bottom of the screen, "Your Story" or "Close Friends" and the close friends tab will have a green star right next to it



a. Once you click on that it will give you the option to add to list which you can then pick through your followers to add specific people to that close friends list and they will be the only ones who will see that story when you decide to post



Appendix E: Email Marketing Guide

Email Marketing Guide

How to connect Google Sheets, Send Grid, and Pabbly.

Tools Needed:

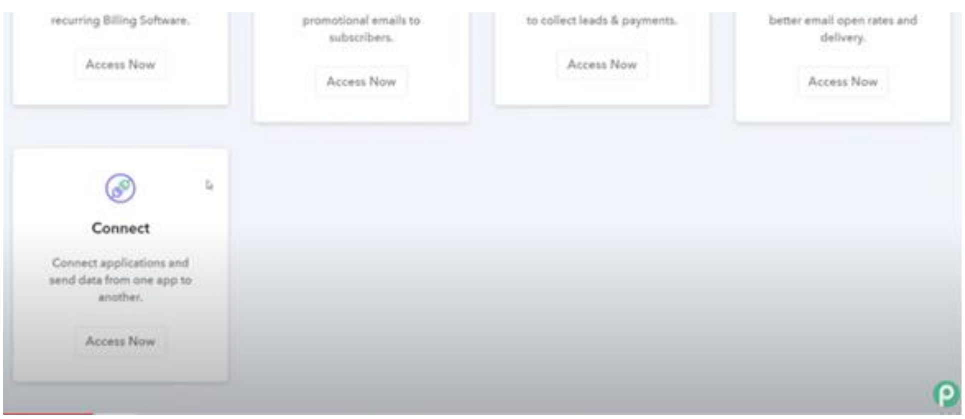
Google sheets: Holds all your contacts that you plan on sending marketing emails to for promotional purposes.

SendGrid: Website used to host up to 2,000 contacts and allows NeuroAthlete to curate one email to send to every contact.

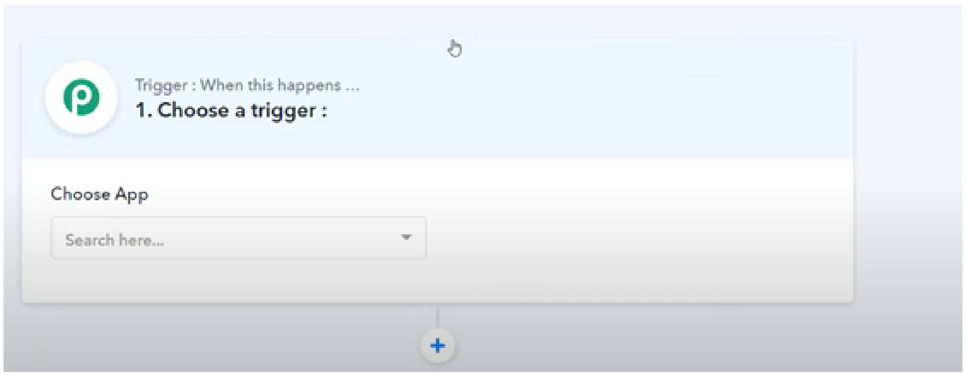
Pabbly: A website tool that allows the user to connect Google Sheets to the Send Grid. Free program.

Steps to connect three programs:

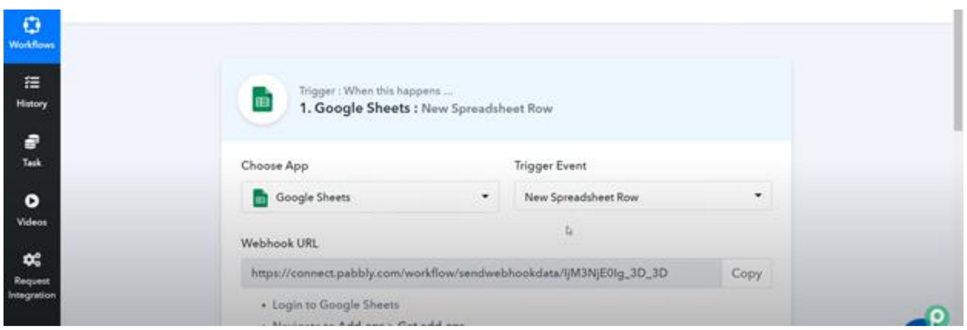
1. Make Pabbly account and go to all apps section. Select on “Access now” under “connect.”



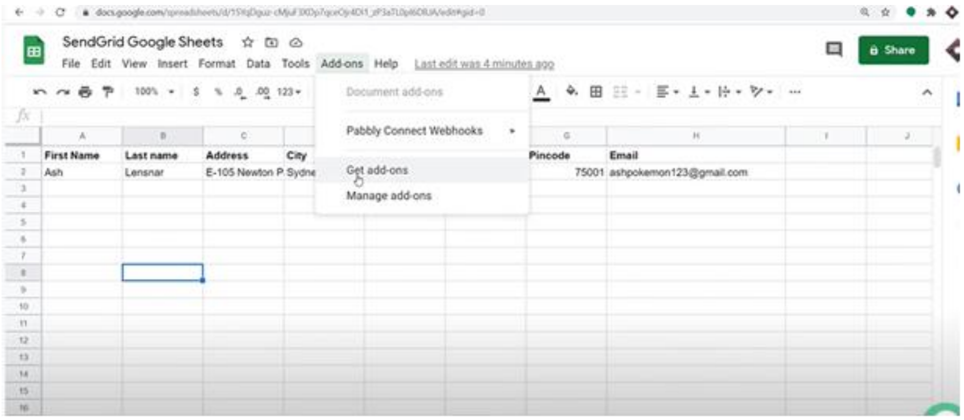
2. Press the blue “create workflow” tab on the upper right-hand corner of the page. Name the campaign.
3. Under “choose a trigger” you should select the app “Google Sheets.”



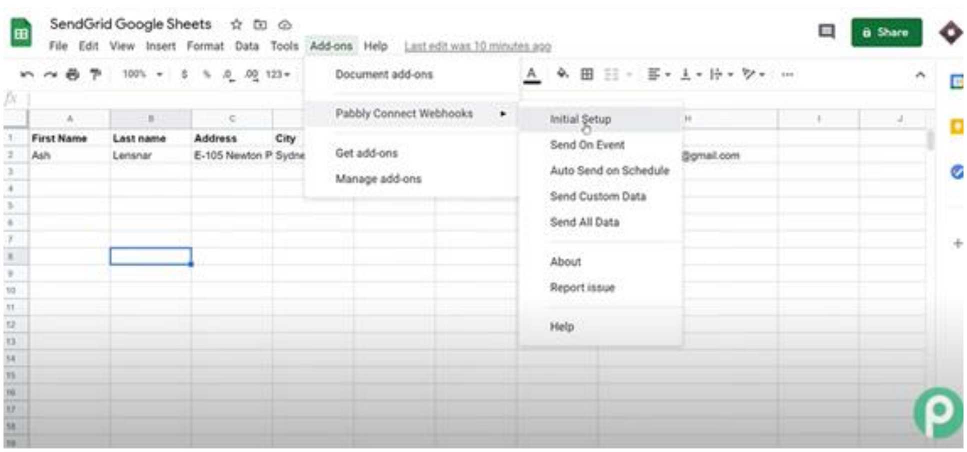
4. When the app is chosen, the trigger event box will pop up. Here, you will select “New Spreadsheet Row.”



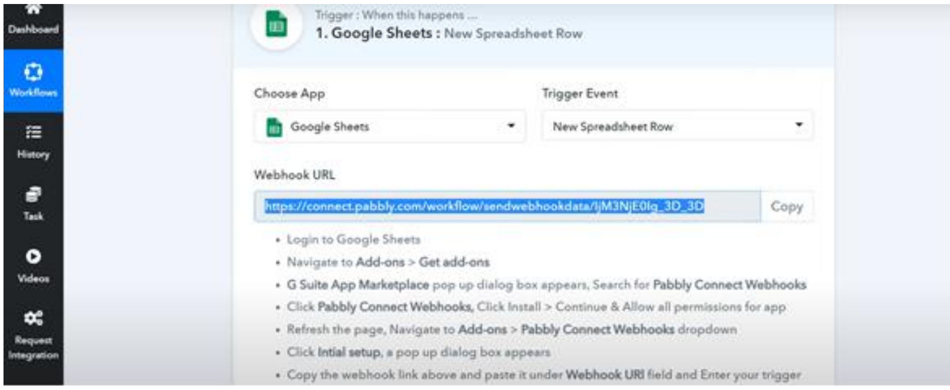
5. Go to google sheet and find the tab above called “Add-ons.” Press “get add-ons".

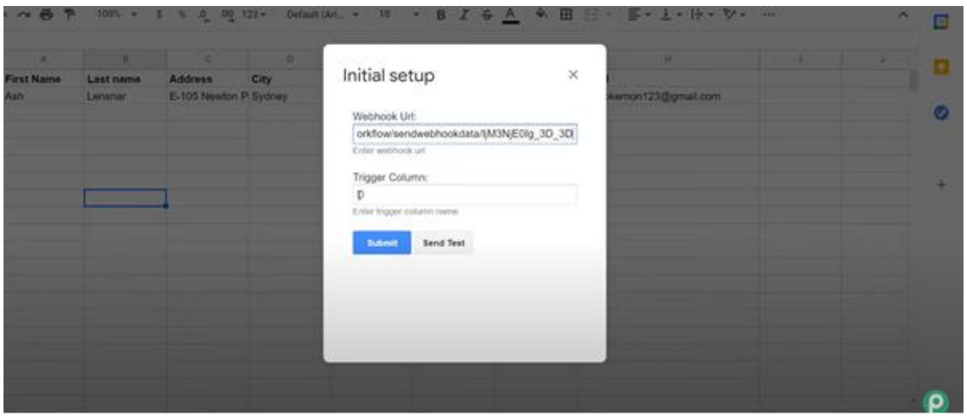


6. In the search engine on the Google Workspace app search "Pabbly Connect Webhooks." You will need to install the program directly on your computer.
7. Once it is installed it will appear on the drop-down menu of "add-ons." Select "initial setup."

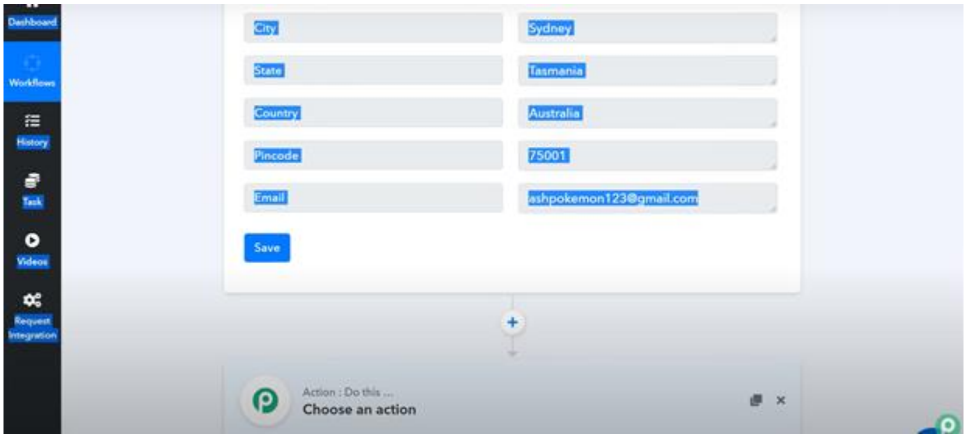


8. Copy the Webhook URL on Pabbly connect and paste it on the "initial setup" webhook URL section.

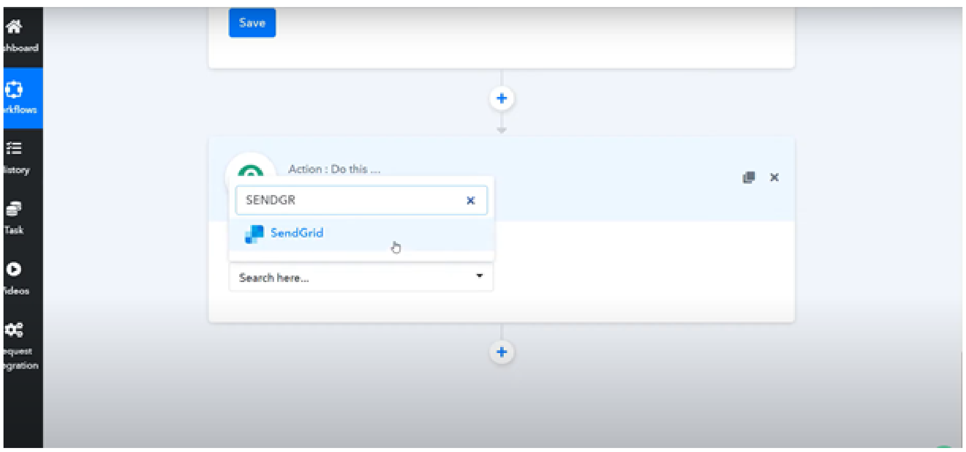




9. The “trigger column” section should be the column in Google Sheets that has the contact’s email address.
10. Go back to Pabbly. Connect and select big blue button “Capture Webhook Response.”
11. Go back to Google Sheets, still under initial setup, select “send test.”
12. Go back to Pabbly and press on the little + button below your first action.

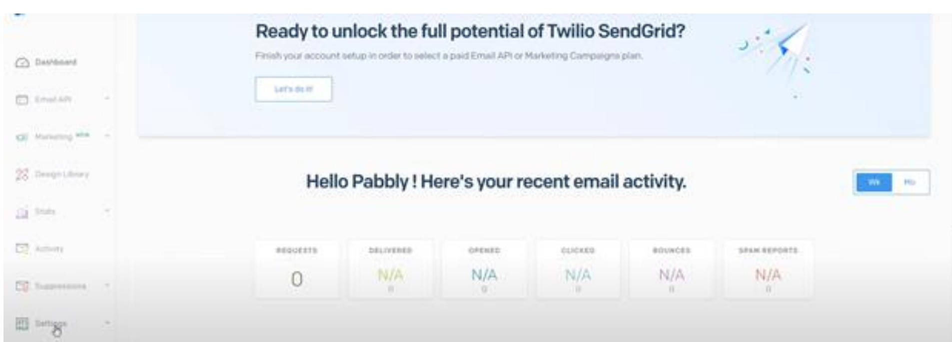


13. Connect the next action to SENDGRID.

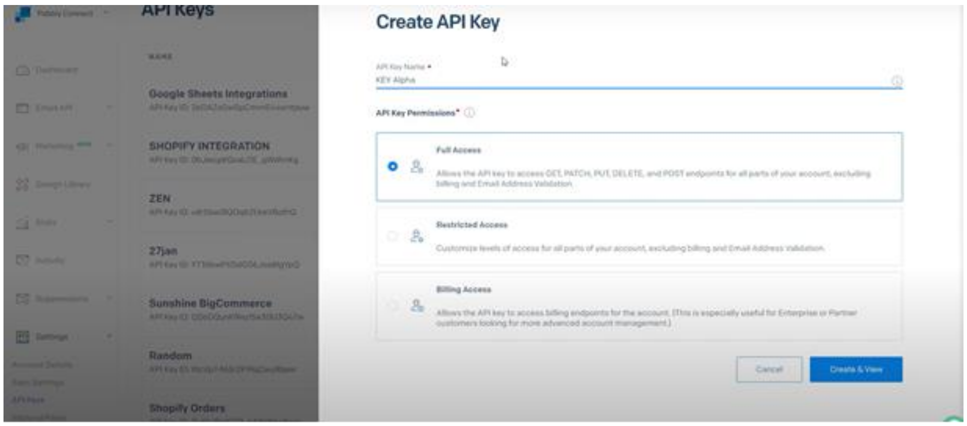


14. Under the new "action event," select "Add or Update a Contact." Select blue button: "connect with SendGrid.

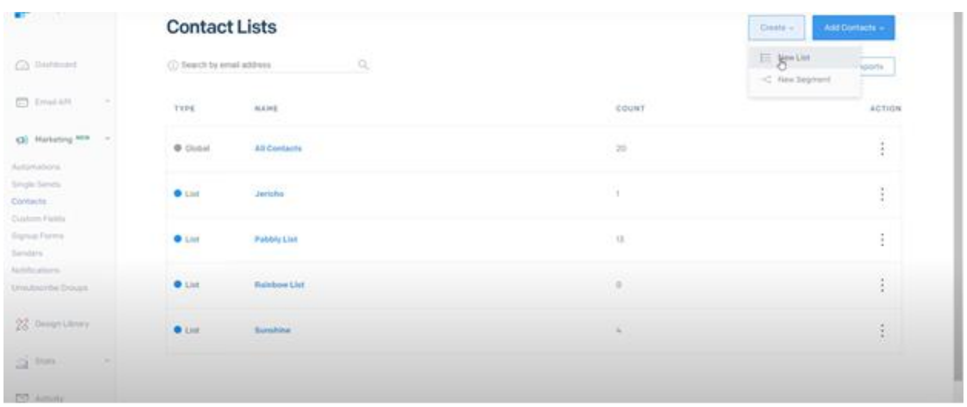
15. Login to SendGrid account and select "Settings" on the left-hand side.



16. Under settings, select “API Keys.”
17. You will need to press the blue “create API key” tab on the right-hand side. Name the new key. Select “full access” and finally “create and view” blue button on the bottom right.



18. Go back to the Pabbly Connect and paste the API key in the “token” spot under “new credentials.” Select “Save.”
19. Go back to SendGrid and under “marketing” on the left toolbar, select “contacts.”
20. Press “create” button on the top right and select “new list.”



21. Name the list. Save.

22. Go back to Pabbly connect and under the new action, connect the list created on SendGrid.
23. Go back to SendGrid and see if your contacts are being updated with your Google Sheets.
24. This is a live program so as soon as you add a contact on Google, it will show up on the list made in SendGrid.
25. To clarify any of these instructions, watch this video: How to Automatically Add SendGrid Contact from Google Sheets (Real-time Integration) - YouTube

Appendix F: Non-Profit Guide

Before Starting a nonprofit, familiarizing yourself with the environment is always recommended. Some ways to do so are provided below.

- **Volunteering** - Volunteering will help you learn about the structure, operations, and services of an organization, and will help to give you the experience you'll need to be successful.
- **Research existing organizations** - Ensure that you aren't duplicating services and that you have something unique and beneficial to give to the community you are looking to serve. Conducting research will also help you determine if your cause would be better served as a project under an existing organization rather than creating a new organization. You can also identify similar organizations that may be potential partners in the future (or as fiscal sponsors).
- **Mission and programs** - Ask yourself what need you are trying to meet and the intended impact. Your mission statement identifies your organization's core purpose and guides decision making. You'll also want to consider how you will achieve your mission and what services or programs your organization will provide.
- **Board members** - Unless otherwise provided in the articles of incorporation, a Colorado nonprofit must have a board. You'll want to carefully consider who will sit on your board.

Below are the basic guidelines for starting a nonprofit, broken into five steps. For more detailed information, refer to the Colorado Community Resource Center's Nonprofit Start-Up Workbook.

1. **Developing bylaws and setting up the board of directors**

Bylaws govern the internal structure of the organization, including the governing board by:

4) Structuring the board of directors
5) Creating the operational and administrative mechanisms
6) Drafting those structures and mechanisms into bylaws

The composition and recruitment of the board of directors is critical. It is important to carefully select the initial directors to determine the manner by which future directors are selected. ("How do I start a nonprofit organization? | Colorado ...")

2. **Incorporating as a nonprofit corporation in Colorado**

Incorporation is a relatively simple procedure. The Articles of Incorporation must contain language required by the IRS to obtain charitable status.

Submit Articles of Incorporation to:

Colorado Secretary of State

Business Division

1560 Broadway, Suite 200

Denver, CO 80202-5169

Information: (303) 894-2200

Fax: (303) 869-4864

Web Site: www.sos.state.co.us

Filing Fee: $50

3. **Developing policies to meet the requirements of the Internal Revenue Code**

Policy documents you must develop to meet IRC requirements include:

- Compensation
- Conflict of interest
- Document retention

- Whistle-blower policies

Also prepare documents to comply with state law, annual reporting requirements, and establish recordkeeping systems. See Principles & Practices for Nonprofit Excellence in Colorado. ("How do I start a nonprofit organization? | Colorado ...")

4. **Obtaining tax-exempt from the IRS, and filing for an EIN**

In this step you must obtain tax-exempt charitable status from the IRS.

(Form 1023 or Form 1023ez)

Generally, the two substantive pieces of information required by the IRS are:

- A statement of activities specifically detailing the proposed activities of the new organization
- Estimated budgets for three years

Frequently, the IRS review of the application includes a request for additional information. The purpose of this information is to determine whether the organization's purposes and proposed activities qualify as charitable under the Internal Revenue Code. ("Guidelines for Starting a Nonprofit | Colorado Nonprofit ...")

Budget information is used to determine if the organization is "publicly supported". Together they indicate whether an organization can qualify as a charity eligible to receive tax-deductible donations. Also, note that actual financial information will be required after the expiration of a five-year period to confirm that the organization is publicly supported. ("Guidelines for Starting a Nonprofit | Colorado Nonprofit ...")

Submit IRS Form 1023, Application for Recognition of Exemption to:

Internal Revenue Service

P.O. Box 12192

Covington, KY 41012-0192

Information: (800) 829-1040

Forms: (800) 829-3676

Web Site: www.irs.gov/charities

Filing Fee: $850 ($400 if revenues less than $10,000/year)

You'll also need to obtain a Federal Employer Identification Number (EIN) by filing Form SS-4.

5. **Register as a Charitable Organization with the Colorado Secretary of State**

Before soliciting charitable contributions or engaging charitable sales promotions, charitable organizations must register online with the Colorado Secretary of State, along with any other states in which it plans to solicit funds.

Register online through:

Division of Public Charities

Colorado Secretary of State

Business Division

1560 Broadway

Suite 200

Denver, CO 80202-5169

Information: (303) 894-2200

Fax: (303) 869-4864

Web Site: www.sos.state.co.us

Filing Fee: $10

Consulting with Legal Counsel

Finally, in consultation with legal counsel, you must establish:

7) A Board meeting minute policy and other corporate record keeping practices
8) Risk management and insurance
9) Contracts and relationships with third parties

Also note that after start-up, legal questions frequently come up, such as those on: maintaining tax exemption, governance and board procedures, liability, licensing and intellectual property, charitable contributions, employment matters, contract review and drafting, and real estate matters.

Additional Resources

- Applying for Tax-Exempt Status Mini Course
- IRS Nonprofit Life Cycle
- Colorado Secretary of State – Charities
- Colorado Department of Law – Charities
- Colorado Department of Revenue
- "Business Member Directory - Colorado Nonprofit Association has a couple of business members that provide guidance and assistance with starting a nonprofit." ("How do I start a nonprofit organization? | Colorado ...")
- "Nonprofit Hub's Starting a Nonprofit Webinar Series - Nonprofit Hub hosts a three-part webinar series that guides you through the process of launching a nonprofit." ("How do I start a nonprofit organization? | Colorado ...") (Cost is $99, includes all three webinars,

downloadable workbooks, and 30-minute office hours with Randy Hawthorne, Executive Director and Co-Founder of Nonprofit Hub)

*Information sourced from coloradononprofits.org

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