



Branding/Marketing Update
08.27.15

Progress to Date



- Updated Project Timeline
- Initial Communications Audit Research
- Identity/Logo Concept
- Prospective CRM Database Structure
- Initial Message Recommendations re:
Budget Process
- Research Plan for Approval

Project Timeline



	First 90 Days					
Dates	8/27/15	9/10/15	10/8/15	11/12/15	2/11/16	3/10/16
Deliverables	Project Timeline	Visual Identity System	Brand Development	Approved Strategic Plan	Website Redesign	Electronic Annual Report
	Msg Feedback re: Budget Process	Communications Audit	Brand Messaging	Approved DB Plan		
	Report on Assets		Research Report	Approved Web Plan		
	Research Plan for Approval					

Comm. Audit Research



- Website(s) - CDD and HOA
- Email: MailChimp
- Text Messaging (using Trumpia)
- Social Media (As many as 10 Groups/Pages)
- Signage (Documenting All in the Community)
- Direct Mail

CRCDD Identity



WHAT WE'D PREFER (SIMPLER)



WHAT WE PROPOSE BASED ON EXISTING NAME:



CRM Database Research



- Website(s) - CDD and HOA
- Email: MailChimp
- Forms - Only a Pool Form (Google Doc)
- Text Messaging (using Trumpia)
- Social Media (MailChimp plug-in for Facebook)
- Pool card Renewal (Best Time to Capture Data)

What has been clear is that no one organization has much homeowner data. **The HOA has VERY limited info and the CDD even less (this was obvious when the Community Reps got their respective lists and found 25-40%+ of the homeowner data to be out of date).**

CRM Database Structure



HOMEOWNER INFORMATION:

- Homeowner #1 - tied to/compared to data from the county property appraiser
- Homeowner #1 Primary Phone # (Checkbox if cell)
- Homeowner #1 Secondary Phone # (Checkbox if cell)
- Homeowner #1 Primary Email Address (Checkbox for Home or Work)
- Homeowner #1 Secondary Email Address (Checkbox for Home or Work)
- Homeowner #2 - tied to/compared to data from the county property appraiser
- Homeowner #2 Primary Phone # (Checkbox if cell)
- Homeowner #2 Secondary Phone # (Checkbox if cell)
- Homeowner #2 Primary Email Address (Checkbox for Home or Work)
- Homeowner #2 Secondary Email Address (Checkbox for Home or Work)
- Additional Occupants (list with name and age)

CURRENT RESIDENT INFORMATION (Checkbox if same as above):

- Same fields as above, if different

Best Ways to Reach You?

- Email (Weekly eNewsletter)
- Text
- Social Media
- Direct mail (Postcards for larger events, Inserts in Statements)
- Southwood App
- My Southwood Website (Calendar)
- Bulletin Boards (HOA office and Pool)
- New Homeowner Orientation / Committee

CRM Database Structure



By simplifying and centralizing where homeowners/residents can maintain data, we'll make it much more likely that all will have the most current information.

We also hope to have the database capture areas of interest (see at right)

AREAS OF INTEREST:

- I'm interested in Volunteer Opportunities
- I'm interested in Special Offers from Southwood
- I'm interested in Special Offers from Southwood
- I'm interested in Event Activities
- I'm interested in coming to HOA/CDD Meetings
- I'm interested in Community Leadership Opportunities (Boards, Community Reps, etc)
- I'm interested in Golf Club News
- I'm interested in Southwood Nature
- I'm interested in a Community Watch
- I'm interested in Lil Kid Activities
- I'm interested in Amenity Updates (Pool Hours, etc)

Message Recommendations



Top Priority:

Communicate what is happening and the real impact on homeowners.

Provide helpful context, information and facts in a clear and consistent manner.

Provide timely updates when issues are developing.

Additional Tasks:

Look for ways to translate legal information so it makes sense.

Work with homeowners to share information that is factual to better manage rumor control.

Develop a communication system that is a conversation, not a push mechanism.

Look for ways to engage homeowners in real dialogue.

Research Plan



Research Goals:

1. Identify communication preferences
2. Gauge interest in community information

Timeframe:

Open survey August 31, close September 1.
Report presented October 8.

Distribution Methods:

- Social Media - post link to survey
- Door-to-Door - volunteers, neighborhood captains
- Phone calls - volunteers

Research Questions:

- How would you describe your level of interest in Southwood community information?
- How would you describe your level of awareness of Southwood information?
- Do you feel that the Southwood community does a good job of communicating information to residents?
- What is your preferred method of communication?
- Which Social Media sites do you use regularly?
- Get contact information for DB