

# CORE STRATEGY & GOALS – 2023 - 24

## **Corporate Goals Alignment:**

*Lead with our Strengths, Be Best at NGSS, Supercharge Digital, Operational Excellence, & Organizational Effectiveness*

- 1. Strengthen & Defend HS / College Life Sciences Market Leadership** (Gen Bio, A&P, & AP) **4-5% growth**
  - Represents ~63% of Traditional Core sales & most proprietary products
  - Focus incremental efforts on new teachers, non-customers, & regaining College market share
  - Work w/ Marketing & IS to develop Customer Knowledge Database
  
- 2. Expand & grow market share beyond life sciences thru superior IP** **6-7% growth**
  - Leverage NGSS / 3D & digital to challenge leaders & win share (Chemistry, Physics, ESS, MS, CTE, Forensics)
  - Develop new customer targets: Districts (ESSER), CTE, & New Teachers
  - Explore Middle School opportunities with Curriculum
  
- 3. Develop / strengthen partnerships** - lead to wholesale, marketing, & new product opportunities
  - Focus on innovative organizations that support teachers & hands-on science

*Core's overall plan = ~ 4.0% or \$3.5M sales growth*

# CORE PLANNING PRIORITIES – 2023 - 24

## CPMI Goals:

1. Strengthen & Defend Market Leadership in HS / College Life Sciences (Gen Bio, A&P, & AP)
2. Expand & grow market share beyond life sciences thru superior IP (MS, CTE, Chem, Phys, & ESS)

## Potential Initiatives: *(in priority order)*

1. **Revitalize branding** – who we are & why we matter to customers [1, 2, & Corp]
2. **Capture more than fair share of ESSER funding** - District level [1, 2, & Corp]
3. **Win Back-to-School** (twice: Dec/Jan for colleges & July-Sept for all) [1 & 2]
4. **Cultivate new teachers aggressively** - long-term play [1 & 2]
5. **Win over non-customers** - Life Sciences - survey results [1]
6. **Be recognized as best in NGSS** [1, 2, & Corp]
7. **Regain College strength** - Sales-driven acquisition, reactivation, & SOW growth [1]
8. **Evolve strategic partnerships** - define, prioritize, & engage; many interact with other campaigns [1, 2 & Corp]
9. **Capture emerging CTE market** [2]
10. **Explore other opportunities** - Middle School & Carolina K-12 [1, 2, & Corp]

*70% of resources should focus on first goal, e.g. Carolina's Crown Jewels.  
All campaigns should be tailored to the market - most will benefit both goals.*

# CURRICULUM STRATEGY & GOALS – 2023/24

## ***Corporate Goals Alignment:***

*Lead with our Strengths, Be Best at NGSS, Supercharge Digital, Operational Excellence, & Organizational Effectiveness*

### **1. Produce and manage highly quality instructional materials for K-12(?) science**

#### ELEMENTARY

- Develop Nexus | Launch 2025?
- Publish 2<sup>nd</sup> Edition of Smithsonian Science for the Classroom K-5
- Maintain BBS3D, SSftC 1E

#### MIDDLE SCHOOL

- Maintain STCMS and OSE
- Explore new MS opportunities with CPMI & SSEC
- Support development of Science Bits

#### HIGH SCHOOL

- Support development of CCV OSE

### **2. Find and close the best opportunities**

- Launch 2<sup>nd</sup> Edition of Smithsonian Science for the Classroom K-5
- Launch Carolina Certified Versions of OpenSciEd High School
- State Adoptions: AL (Smithsonian), FL (Science Bits), TX (Science Bits), OR (OSE)
- RFPs

### **3. Help customers be successful and refer us**

- Improve Professional Learning offering
- Develop and strengthen strategic partnerships

# CURRICULUM MARKETING PRIORITIES – 2023/24

## Curriculum Goals:

1. Produce highly effective NGSS K-8 curricula
2. Find & close best opportunities
3. Help customers be successful & refer us

## Potential Initiatives: *(in priority order)*

1. **Be recognized as best in NGSS** – Linked to #2 *[ALL]*
2. **Revitalize branding** – Brand architecture with curriculum programs *[ALL]*
3. **Launch 2<sup>nd</sup> Edition of Smithsonian Science for the Classroom K-5** *[1 & 2]*
4. **Launch Carolina Certified Versions of OpenSciEd High School** *[1 & 2]*
5. **Support state adoptions and RFPs** *[1 & 2]*
6. **Customer Success** – customer communication and ongoing support *[3]*
7. **Capture more than fair share of ESSER funding** - District level *[2,3 & Corp]*
8. **Evolve strategic partnerships** - define, prioritize, & engage; many interact with other campaigns *[1, 2 & Corp]*
9. **Explore other opportunities** - Middle School & Carolina K-12 *[1, 2, & Corp]*

# DISTANCE LEARNING STRATEGY & GOALS – 2023/24

## **Corporate Goals Alignment:**

*Lead with our Strengths, Be Best at NGSS, Supercharge Digital, Operational Excellence, & Organizational Effectiveness*

- 1. Grow Distance Learning aggressively** (20%+)
  - Retention - customer support, polishing on-boarding process, Salesforce automation, & continued evaluation / touch points
  - Growth - message development and Salesforce campaign support
  - Acquisition - increase lead gen, message development, & Salesforce campaign support
    - Better behavior automation
    - New lists
    - Ensure correct sales model for post covid market
  
- 2. Win online science market** - Develop highest-quality digital experience
  - Complete Carolina Online Gateway
  - Continue collecting feedback & improving Gateway throughout 2024
  - Improve experience with SSO & LTI 1.3
  
- 3. Capture new opportunities** - Develop high-quality content for additional audiences
  - Virtual high school Chemistry & Biology
  - Genetics
  - Forensics
  - Additional Physics
  - Chemistry for Nurses

# DISTANCE LEARNING PRIORITIES – 2023/24

## Distance Learning Goals:

1. Grow Distance Learning aggressively (20%+)
2. Win online science market
3. Capture new opportunities

## Potential Initiatives: *(in priority order)*

1. **Retain, acquire, & grow customers** - \$12M in Sales in [1, 2, & 3]
2. **Launch & support Gateway for all subjects** [1, 2, & 3]
  - 2023 launches: A&P, Chemistry, & Micro
  - Spring '24 launches: Bio, Env. Sci., Physics, Geology, Forensics, & Allied Health
3. **Launch & support new High School Virtual School Kits** ('24-'25 Chemistry & Biology) [1, 2, & 3]

# CUSTOMER TEAM PLANNING PRIORITIES – 2023 - 24

## CPMI Goals:

1. Strengthen & Defend Market Leadership in HS / College Life Sciences (Gen Bio, A&P, & AP)
2. Expand & grow market share beyond life sciences thru superior IP (MS, CTE, Chem, Phys, & ESS)

## Curriculum Goals:

1. Produce highly effective NGSS K-8 curricula
2. Find & close best opportunities
3. Help customers be successful & refer us

## Distance Learning Goals:

1. Grow Distance Learning aggressively (20%+)
2. Win online science market
3. Capture new opportunities

## Customer Team Goals & Potential Initiatives: *(in priority order)*

### 1. Intensify **customer-centric marketing**:

- **Revitalize branding** – begin building deeper relationship with customers; communicate who we are & why we matter to customers
- **Win Back-to-School** (twice: Dec/Jan for colleges & July-Sept for all)
- **Cultivate new teachers aggressively** - long-term play
- **Dial up message relevancy** (best in NGSS, trusted partner, easiest to work with, seasonally-relevant content calendar, fun, etc.)
- **Evolve strategic partnerships** - define, prioritize, & engage; many interact with other campaigns
- **Deepen customer/non-customer focus** (Insights research, Customer Knowledge Database - CKD, decision-making, targeting, etc.)
- **Support critical product launches** (Smithsonian Science K-5 2<sup>nd</sup> Edition, OpenSciEd High School, etc.)
- **Optimize media mix & test new channels** (website, app, direct mail, paid search, banner ads, retargeting, video, partnerships, etc.)
- **Explore/support other opportunities** (as resources allow) - Middle School & Carolina K-12

### 2. Win with **sales**:

- **Capture more than fair share of ESSER funding** - District level
- **Regain College strength** (acquisition, reactivation, & SOW growth)
- **Support state adoptions & RFPs**
- **Capture emerging CTE market**
- **Develop Sales Enablement within Marketing**

### 3. Improve **digital experience to drive customer success & engagement** (create reasons to engage beyond buying cycles):

- **Launch headless platform improvements** (look & feel, organization, functionality, etc.)
- **Drive mobile app functionality/look & feel refinements**
- **Incorporate branding & customer insights** (as available & applicable)

### 4. Redefine **processes & develop team**:

- **Replace agile quarterly planning** – transition to integrated & collaborative annual planning with workflow management
- **Explore AI/ML options** - streamline & automate processing & tasks where applicable, find insights in data
- **integrate Customer Service data collection processes**
- **Develop & maximize internal/external partnerships**
- **Update & catalog content for increased relevance & ease of use**
- **Explore new & maximize existing tools** (Salesforce, GovSpend, Gartner, Donors Choose, CKD, new ESP, etc.)

# CUSTOMER TEAM INCREMENTAL INITIATIVES / TESTS – 2023/24

## Customer Team Goals & Potential Incremental Initiatives / Tests:

## Expected Incremental Costs:

	<i>Test</i>	<i>Full Year</i>
<b>1. Intensify customer-centric marketing:</b>		
- Heavy up Paid Search	\$15K	\$50K
- Engage with video through social media (YouTube, LinkedIn, Twitter, Instagram, etc.) & other channels	\$30K-\$50K	\$150K-\$300K
- Improve visibility on supplier directories (American Chemical Suppliers/Lab Equipment & Supplies)		\$8K-\$14K
- Drive e-procurement business (College focused digital campaign for awareness & conversion)		\$9K
- Develop targeted seasonal direct mail test as replacement for catalog	\$125K	\$250K
- PR		
- Media Planning		
- Advertising campaigns		
-		
<b>2. Win with sales:</b>		
- Better enable Sales with Salesforce AI “Einstein” tools (Contacts, Capture, Insights, Scoring, Forecasting)	\$3K (Inside Sales only)	\$22K (all sales)
<b>3. Improve digital experience to drive customer success &amp; engagement</b> (create reasons to engage beyond buying cycles):		
- SEO Agency Strategy Help (linking strategies, “key word” copy refinements, site architecture, competitive assessment, external site links, etc.)	\$25K-\$38K	\$100K-\$150K
- Upgrade to Titan Enterprise (replace Titan Forms & Hello Sign) – integrates with Salesforce to create proposals & manage them in one place	\$5K	\$5K
<b>4. Redefine processes &amp; develop team:</b>		
- Change Management Training (Corporate)	\$5K-\$10K	\$5K-\$10K
- UX Design Certification (Louisa & Chris)	\$2K-\$30K	\$2K-\$30K
- Marketing Skills Training (Corporate)	\$10K-\$15K	\$10K-\$15K
- Restructure, hire, & partner with Adv. & media agencies to support new strategies		
<b>TOTAL:</b>	<b>\$220K-\$291K</b>	<b>\$611K-\$845K</b>