

balfour®

FreshStart Balfour Rep Playbook

For internal use only!

Updated 9.15.11

Key changes highlighted in Yellow

PROGRAM

As part of our new School Enrichment programming, Balfour rolled out – at no cost to our schools – **FreshStart**, a freshman orientation program provided exclusively to Balfour high schools by Balfour Scholastic and Yearbook representatives. The full program became available **August 1, 2011**.

The **FreshStart** program is designed for use with an incoming freshman class (including eighth-grade classes) within the first month or two of high school or during the summer months prior to entering. We recommend positioning **FreshStart** as part of a broader orientation provided by the school; however, it stands alone as a nice Freshman Assembly.

The **FreshStart** program consists of **five** elements, with the first two being core to the program. Read more about these below.

1. **Short Movie**
2. **Mini-Magazine** (Appendix A)
3. **Journal Note** (Appendix B)
4. **Time Capsule** (Appendix C)
5. **Poster** (Appendix G)

BENEFITS

For Schools:

One of the biggest challenges facing high school administrators is that most new students are not prepared with the academic rigor or social savoir-faire needed at this new educational level. Students typically dive into high school and immediately find themselves swimming in questions about schoolwork and social life. Students who flounder during this first year will likely continue to struggle throughout high school.

FreshStart offers insights and advice from upper-classmen, coupled with tips, suggestions and anecdotal information from other highly credible sources. Essentially, this program helps these young students get a leg up on navigating high school life.

For You:

The **FreshStart** Program is intended to be a sales development tool for Balfour representatives in both Scholastic and Yearbook sales. While getting in front of a freshman class is not your typical entry point into your schools, consider the benefits you'll derive from doing so. You will...

1. Make an altruistic gesture to your customer, not related to a sales transaction.
2. Establish Balfour in the school earlier, when students are most excited about high school.
3. Familiarize parents with Balfour before asking for a check for a ring or yearbook.
4. Set yourself up as a "one-stop-shop" and keep your competitors at bay.
5. Help your customers with a very real challenge they face each year.

PIECES*

All elements of the **FreshStart program are the copyright of CBI® | Balfour®. Usage of the materials for purposes other than the original intent (in front of a freshman class) is considered an infringement on that copyright. Any distribution or re-distribution of the materials – other than directly through a Balfour representative—will also be considered copyright infringement.*

The Movie

The nine-minute, professionally produced film is set inside a high school and showcases six non-actors interacting for a day. The “real” stars include three incoming freshmen discussing their worries, concerns, questions and excitement with three graduating seniors. The advice these seniors give is sage, prudent, candid and relevant.

Distribution: A password-protected, watermarked version of our movie can be accessed at this URL: <http://vimeo.com/balfour/freshstartmovie> (Password = *freshstart*). You may use this for pre-screening with your customers and employees. The final movie (on DVD) was mailed to each rep on July 29.

The Mini-Magazine

This 20-page, 5”x7” colorful brochure is modeled on the current teen magazine format: vibrant, mix-and-match typefaces, pullout quotes, pop-quizzes and bulleted, pithy text (Appendix A). The subject matter covers topics such as: making good choices, high school traditions, showing respect, working smart, getting organized and setting goals. All information was derived from highly credible sources as noted on page 19 of the magazine. **White space on the back cover allows you to add your contact information.**

Distribution: One mini-magazine per freshman student. Orders are packaged in 50 qty. and can be ordered on the FreshStart Order Form located in your rep portals.

The Journal Page + Envelope Set

Each student receives a sheet of pre-printed notepaper and matching envelope (Appendix B). The set up: the principal (or other) asks students to write a note to his/herself – and their ‘future self.’ Each student will then fold and insert the sheet into the envelope, seal it, write their name on the front and deposit it into the Class Time Capsule on their way out of the class assembly. Principals can hold a celebratory event during their senior year and redistribute these journal pages to their respective owners.

Distribution: One page/envelope set for each freshman student. Orders packaged in 50 qty. and can be ordered on the FreshStart Order Form located in your rep portals.

The Class Time Capsule

The physical ‘capsule’ is a 12”x12”x12” clear acrylic box with a slit in the top and a padlock for closure (Appendix C). Our Balfour logo is screen printed on the front (padlocked) side. The capsule (acrylic box) is **reusable**: when a senior class graduates and the notes are redistributed (the box becomes empty), a new insert is all that needs to be purchased for the incoming freshman class to reuse the capsule.

Distribution: One capsule (box) should be ordered for each freshman class using the FreshStart Order Form.

The insert of the capsule is a card-stock wrapper (showing through the clear acrylic) that reads: *Time Capsule, Class of 2015*. Next year, these will be available in Class of 2016...and so on. Eventually, each school will have a set of four Class Time Capsules (one for each class).

Distribution: The inserts come in a) standard colors (white, blue and green), or b) custom school colors. There is no cost difference between the two. Standard colors may be ordered on the FreshStart Order Form. **Custom school color orders will be handled directly with the vendor.** (Appendix C.)

The Poster

We have taken the FreshStart program out of the class assembly and into the hallways. We now have poster art available for you to download and print locally at a FedEx Office or another reputable printer. (Appendix G.) You can even customize these for each of your schools:

- Current high-res artwork is for a 24"x36" poster.
- There are five ethnic groups, with one female and one male of each group represented (one per poster); you can choose to match your school's respective demographic mix.
- These are available for downloading and printing immediately – artwork is in your respective rep portals with other FreshStart materials.
- These say 'Fresh start.' on them; however, they are relevant to all students as they zero in on "choices" and choosing to graduate as key messages.

Distribution: Available for download immediately from either Rep Portal. No ordering necessary. Select your preferred gender and ethnic mix PDF files.

REP'S ROLE

You can be as involved as you and your principal determine is appropriate. Here are some suggested ways you can work with the principal to deliver **FreshStart** in your schools:

1. Principal/Counselor + Rep

- a. Principal welcomes students and introduces you
- b. You introduce and start the movie
- c. As the movie is ending, your designated helpers can distribute the mini-magazines to students while you highlight portions of the content you find relevant (especially 'Bring this home to your parents and do the interactive quiz with them!')
- d. Principal thanks you and then introduces the Journal Page and Class Time Capsule. *Since this is more intimate than the movie, and something the principal will 'own' with the students, it is suggested that you encourage the principal to handle this piece of the program.*
- e. You help collect the envelopes in the Class Time Capsule at the door at the end of the assembly.

2. Principal/Counselor Only

- a. You review the movie and mini-magazine with the principal prior to the assembly.
- b. During the assembly, you are introduced and help facilitate the movie, mini-magazine and journal distribution.
- c. You help collect the Journal Notes – and perhaps hand out a 'reward' – at the end of the assembly.

3. Rep Only

Some schools may not want to initiate the Class Time Capsule at their school for various reasons. In these cases – and especially when there is a longer orientation with FreshStart being a small element – the principal may be more likely to have you introduce the movie and distribute the mini-magazines.

RELEASE SCHEDULE

All **FreshStart** materials may be ordered immediately. All items began shipping on **August 1**.

The Balfour FreshStart Order Form (Appendix D) and supporting documents can be found: on the **Scholastic Rep Portal under Marketing**; or, on the **Yearbook Rep Portal in the Balfour Forum under the Resource Center – 2011**.

PROMOTIONS

- **Introductory Email** (sample) for you to send to your principal(s) (Appendix E)
 - ✓ *If you would prefer someone from Communications to send a promotional email to your school principal introducing the **FreshStart** program (and direct them to you if they ARE interested) please send contact name and email address to Lynne Skinner.*
- **Press Release** (template) for local and hyper-local distribution (Appendix F)

Please make sure that, when using the press release template, you 'un-highlight' those areas that we highlighted in the template for your customization points (otherwise, it appears that you simply used a...well...template!)

 - ✓ *If you would prefer someone from Communications to send your localized press release to area media representatives, please send local, neighborhood or community newspaper name, contact name and email address to Lynne Skinner.*

PROGRAM CUSTOMIZATION IDEAS

Please let us know others so we can share them with your peers!

- **Involve parents.** If the freshman orientation program at your school includes parents, consider including them in the Class Time Capsule event. *Make sure you order additional Journal Page + Envelope Sets OR custom-make your own for parents.*
- **Encourage principals.** Suggest that principals showcase the Class Time Capsule throughout that class' high school journey– use at class assemblies, during difficult or exciting times, at Senior celebrations.
- **Provide branded pen or pencil.** Give one to each student as they receive their Journal Page + Envelope Set. They'll hold on to their new 'school supply' even after they drop their note in the Class Time Capsule.
- **Turn it over.** If a principal has a tradition or would like to have students write down **specific** additional notes, they can ask students to write additional notes on the back.
- **Reward the student.** When they drop their note in the Class Time Capsule, present them with an inscribed rubber bracelet, a Class of 2015 rubber bracelet, ring or any specialty item in which you choose to invest for this class.
- **Choose an interesting display location.** Maybe the principal wants to keep the Class Time Capsules in his office; other locations could be interesting: a trophy case, class hallway, display case in the cafeteria or gym. *NOTE: With enough demand, we may eventually consider crafting a custom display for the four Class Time Capsules at a school.*
- **Include other items.** Depending on how large your freshman class is, you will have varying amount of empty space in your Class Time Capsule. Consider suggesting that the principal include other class-relevant items in the capsule (as long as it's not too heavy!): newspaper or magazine with 'big news' of the year; activities and sports programs; class listing; yearbook, etc.
- **Pitch to Middle Schools.** Keep in mind that the class graduating from middle school or junior high is the same class of incoming freshman that may see **FreshStart** next fall. If the corresponding high school has **FreshStart** in the school, there's no need to approach the middle school. However, if you've got a middle school relationship you'd like to shore up and the high school belongs to a competitor, use the movie and mini-magazine with your 8th grade class.

NEW BEST PRACTICES FROM FIELD *(in addition to those originally mentioned above)*

- Assign a **dollar value** to the program in your bid or presentation. Values quoted by reps have ranged from \$2,000 - \$5,000. In addition to professional production and printing costs, this value could also reflect costs associated with bringing in a speaker, hosting a panel or other presentation. This can help offset CASH donations to schools.
- Don't forget to stamp or label your **contact information** on the back of the magazines! Don't let it go home without parents having a way to contact you!

- Freshmen each **sign a graduation gown** on the way out of the assembly.
- Some schools want the students to be more introspective and take more time with their Journal Note; thus, they are distributing and collecting these in the Freshman **English Classes** (through those teachers).
- **Involving seniors** in the actual assembly is proving popular: after the movie screening, the lights come up and a panel of seniors will in front of assembly and answer questions and/or give testimonials to freshmen.
- Screen the movie and distribute the magazines to **parents of freshmen at Back-to-School nights**. They are learning a lot as well, and have a great response!
- Make sure to **test the DVD** on the piece of equipment you will use prior to the day you present.
- Using the full program to kick off a **fundraiser** for the Freshman Class – use the new Freshman Gear as a fundraiser for the class.
- Help kick off a Senior-Freshman (or upper/lower classman) **mentoring program**.
- Keep your **intro short, sweet** and to-the point. It will be far more memorable.
- Use the **PPT presentation** provided when presenting this program to new principals—good summary! (Appendix H.)

FAQs

General FAQs

- **What if there are multiple Balfour reps that service the same school?** *Please pick up the phone and coordinate the process directly or work with your RVP.* If one of you has a better relationship with the Principal, then that rep should introduce FreshStart on behalf of both of you. There's no reason you cannot both attend a front-office meeting or the school assembly.
- **Will there be additional FreshStart materials to deliver throughout the year?** Our goal this year is to introduce the orientation program to our schools. *We have recently added poster art -- available for downloading and printing locally. PDFs are now available on the rep portals. Stay tuned for possible other FreshStart materials.*
- **Who pays for these materials?** The first THREE sets of program materials that you for your schools – regardless of class size – will be paid for by Balfour. All you pay is shipping costs. The individual representative will pay for materials ordered for additional schools, prices presented are 'at-cost' and are included on the FreshStart Order Form. (Complete program runs \$70-\$140 for a class of 250.)
For your three free materials packages, please:
 1. Order the materials you need via the FreshStart Order Form
 2. Send an email to Lynne Skinner and let her know the names of each of the three schools (as you sign them up), their class sizes and some feedback on the reception
 3. The cost of the materials will be credited back to your account
- **Why don't we see more Balfour branding in these pieces?** FreshStart is an enrichment program, meant as a gift for your customers. To make this a heavily branded program (or resembling our current branded pieces) would not reflect our intentions and appear to be 'sales' material.

Mini-Magazine FAQs

- **Where did the information in the mini-magazine originate?** The main sources for the FreshStart mini-magazine are listed on the bottom of the Notes page (page 19.) The final contents are an aggregation of information provided by those sources. In addition, we used other research materials for such articles as *Pop Quiz: High School Traditions*.
- **How can I get my contact information on each mini-magazine?** On the back of the mini-magazine (below the *Make Your Mark* ad) we provided a white space approximately 7" wide x 3" high for you to customize these with your contact information. We suggest printing the information on labels or using a rubber stamp.
- **Do I need to do anything other than hand out the mini-magazines?** The mini-magazines are a leave-behind/take-away for freshman students and we expect they will be shared with their parents. Other than distributing the publications and suggesting that they take them home and do the *Extra Credit Quiz* on page 9 with their parents, you should not need further explanation of the magazine.

Movie FAQs

- **How long is the movie?** It is 8 minutes 56 seconds long.
- **Does the movie contain any material that could be considered anything other than Rated G?** No, although the issues the students face may not be understood by a younger audience, there is nothing in the movie that cannot be viewed by a young child.
- **Who are the kids in the movie and why were they selected?** The six students were selected from a casting call for non-actor incoming freshmen and graduating seniors. Dozens of students were interviewed for the movie; unfortunately, we had limited-to-no candidates of certain ethnicities. These six students were selected based on their ability to articulate their thoughts, challenges and advice to others...on camera. We performed school and background checks on each student and they were all of upstanding character. These students were not paid in cash; however, they did receive a new iPad® as a gift for their time!
- **Can I JUST play the movie or do I need to use other pieces as well?** A movie screening must be accompanied by the distribution of mini-magazines as the magazine contents expand upon the dialogue in the movie and offers the student a 'take-away' for themselves and their parents. The mini-magazine also contains Balfour branding, where the movie has fleeting mention of Balfour.
- **How do I play the movie at my school?** Each rep was mailed a copy of the movie on DVD (see letter below.) If you have any difficulties with the DVD, please email Lynne Skinner or call 512.440.2726.
- **What if I have multiple schools needing the DVD on the same day and I only have one DVD?** We understand that this may be a scenario you encounter, especially early in the school year. Contact Lynne Skinner to make arrangements.
- **Can I post the movie to my website, Facebook page, YouTube or at the school?** No. This movie is a proprietary asset of Balfour and should be used only in your school's freshman class assemblies/orientations. Again, this is a sales development tool; it is not intended to be available to the masses.
- **Will we have a Spanish-language version?** We have received a lot of feedback on this and have determined that schools do not want/need the Spanish-language version.

Class Time Capsule FAQs

- **I have some schools with very small class sizes. Can I order a smaller Class Time Capsule?** At this time, we are sourcing smaller capsules. However, this would also entail redesigning and scaling the interior wrapping for those time capsules. We suggest that you move forward with FreshStart Class Time Capsules as is – perhaps include other items in the box until we reach critical mass of requests.
- **What does a principal do with the Journal Note of a student who drops out or does not graduate?** We do not feel that Balfour should be involved in the planning for this type of scenario, as these are school and personal issues.
- **Can I order other class years besides the 2015 you have on the order form?** *We now have Class of 2013 and Class of 2014 uploaded to the City Color Imaging site from which you are currently ordering your custom 2015 Time Capsule inserts. Make sure you select which year you are ordering.*
- **What do I do if the Class Time Capsule arrives broken or cracked?** The acrylic/Plexiglas® time capsules are fragile and may shift and break in transit. If this happens, please take a photo of the capsule upon removing it from the shipping box, then contact 800.250.5424 ext. 2827 or merchandiserequest@balfour.com for an immediate replacement.
- **What if a principal wants to customize the Journal Notes questions?** If a school principal is interested in having his/her freshman class write a specific note or commitment to read their senior year, you have two options: a) have the students write it on the back of the note provided; or, b) create a custom note that will fit the envelope provided. We want these notes to work for the principal, so feel free to customize it!

Poster FAQs

- **Why did you add a poster to the mix?** We had several reps needing to: **a)** show a 'next step' in the FreshStart program – something outside the assembly; and, **b)** replace posters that were hung by competitors in our school hallways (especially C2G).
- **Why can't I order them on the order form?** There are two reasons you cannot – and need not -- order these on the standard FreshStart Order Form:
 1. These are customizable for you and your schools – we felt this aspect was far more important than printing a standard one-size-fits-all inventory of posters and pushing out to you. You can select from five different ethnicities to reflect your school demographics (Hispanic, Asian, Middle Eastern/Indian, African American or Caucasian) AND both genders for each group.
 2. The costs associated with mass-printing a standard (one-size-fits-all) poster did not seem worth the risk of these posters going unused.
- **How much will these cost me to print?** It depends on your printer. For a 24"x36" common poster printing, this will range from \$22 - \$40* each (depending on the options you select). If you are interested in foam mounting and laminating a poster, it could run between \$70- \$80*. (**These are prices from FedEx Office; you may find alternate pricing at another local printer.*)
- **How do I get these printed at FedEx Office?**
 1. You can download the files you want to print from your respective rep portal, and bring the disc or flash drive directly to a FedEx Office in your area.
 2. You can log on to FedEx Office Printing at <http://fedex.com/us/office/copyprint/online/>. Choose "Signs, Banners and Posters" then on "Learn More" (under Print Now).
 3. *In the left-hand menu, select "Posters." Peruse the options or call your FedEx Office center for help.*



This letter was mailed to each rep with DVD and magazine samples on July 29

Dear Balfour Representative,

Enclosed you will find your DVD of the **FreshStart** movie and samples of the printed **FreshStart** magazine. *This DVD is YOUR asset as a Balfour Sales Representative and should be protected like your ring case or your prospecting book.*

Let me take a moment to clarify our distribution strategy for the **FreshStart** program.

Mini-Magazines – Please order enough magazines to distribute one to each member of your freshman class(es). The movie is **not** designed to be shown to a freshman class without the accompanying magazine.

Three versions of the FreshStart movie are available– for use at distinctive stages with schools:

- **The Trailer** (downloadable from:
https://www.yousendit.com/transfer.php?action=batch_download&send_id=1200378715&email=356f9e0b8f86c04a948e62a2324a5f8e)
This movie trailer is just under 2 minutes long and is intended to be a promotional piece only. You might use this trailer in the following scenarios:
 1. In an email or face-to-face meeting with a prospective new customer.
 2. As a teaser when setting up a face-to-face meeting with your principals.
 3. Any Balfour pitch or business promotion where you are reinforcing our brand or otherwise selling Balfour as a partner-of-choice (e.g., yearbook workshops, competitive pitches, new parent orientations, etc.)
- **The Screening Version** (<http://vimeo.com/balfour/freshstartmovie> Password= freshstart)
This is a lower-resolution, watermarked version of the full movie and is 9 minutes long. *Please do not use this to play to a large audience or distribute in bulk as a 'teaser' for opening new doors.* You might use this link in the following scenarios:
 1. When meeting (via email or face-to-face) with a customer or prospective customer in order to introduce or get approval to bring the program into a freshman class assembly.
 2. To send to your employees and others close to your business so that they might get a glimpse into our new School Enrichment Program.
- **The Final Version on DVD (enclosed)**
This is the high-resolution movie (9 minutes) that you will take to freshman assemblies at your school. This DVD is digital-rights protected and may not be copied or uploaded to other devices; it must be played directly from a computer DVD drive or on a DVD player.

This is not a 'leave-behind' piece; we are not mass-duplicating this DVD, and only produced one copy for each Balfour Sales Rep. **We have presented you with the Trailer and the Screening Versions of the film to cover the selling-in process. Please respect that we are trying to keep this from falling into competitor hands too quickly in our nationwide rollout of the program.**

I hope I have clarified our distribution strategy; don't hesitate to email me if you have questions. Please don't forget to send an email to me as you bring the program into schools (do not wait until the end of the school year). This will provide assurance that the costs associated with your first three orders are credited back to your account in a timely manner.

Lynne Skinner