

## Franchise Monthly Sales Call

Jeffrey Chase, Manager Franchise Sales and Development

September 25, 2013

This is our inaugural Franchise monthly sales call. Our calls will be specifically geared towards sales and marketing. We will cover various topics on each call, including sales strategies, updates, win/losses and more. We will include guest speakers, released sales data, open discussions, questions / answers, acknowledgements and just a boat load of sales information that will further integrate our sales strategies and sales activities between OW and you, our franchise partners.

We will keep our calls to a maximum one hour. To help with this I ask that you email me any questions you may have during or after the call. We can then get the answers and either email you back or talk about it on the next call. Each guest speaker might open up to questions on their specific topic during the call. So, again to keep the call time to one hour we ask that you email me at [Jchase@oakwood.com](mailto:Jchase@oakwood.com) the big questions and topic specific questions will be available on the calls to the guest speakers, time permitting.

As a regular part of our calls I want to give you an RFP update, along with some DOS updates from both market and territory sales.

RFP – as accumulated by Jason Adrian.

- Types: RFP 25, RFI 6 and RFQ 9 = 40
- Wins 6, Lost 10, Pending 16, No bid 3 and No Decision 5 = 40
- Win %: 37.5% - Pending % 42 – this is pending / by overall minus no bids.

Client	Type	RFP Status	Date Submitted
Canadian National Defense	RFQ	Lost	1/7/2013
NASA LARSS program	RFP	Won	1/7/2013
Automobile Club Enterprises	RFP	Lost	1/18/2013
The University of Washington	RFP	Lost	2/7/2013
Flextronics	RFP	Pending	2/7/2013
DOD - Panama	RFQ	No Bid	2/8/2013
DOC - NOAA - Honolulu	RFP	Won	2/14/2013

Goldman Sachs	RFI	Pending	2/14/2013
BMW MC	RFP	Lost	2/15/2013
DOD - FT Lee	RFQ	No Bid	2/21/2013
DeVry	RFP	No Decision	3/15/2013
NOAA - SEATTLE	RFP	Lost	3/16/2013
Bank of America	RFP	Won	3/18/2013
Nordstrom	RFP	Won	3/22/2013
DOI - BLM	RFP	No Bid	3/25/2013
Cargill	RFP	Lost	3/25/2013
Abbott Laboritories	RFP	Won	3/29/2013
White & Case	RFP	Lost	4/15/2013
Ameriprise Insurance	RFQ	Pending	4/17/2013
Ernst & Young	RFP	Won	4/19/2013
Citibank	RFP	No Decision	5/9/2013
PricewaterhouseCoopers	RFQ	Pending	5/10/2013
ON Semiconductor	RFP	Pending	5/13/2013
Accenture	RFI	No Decision	5/16/2013
HHS - NIDDK	RFQ	Pending	5/7/2013
Triway International	RFI	Pending	5/20/2013
DHS - USCIS	RFI	No Decision	5/23/2013
British American Tobacco	RFP	Pending	5/28/2013
World Bank	RFQ	Pending	5/28/2013
Nestle	RFP	Pending	6/7/2013
Citi	RFP	Pending	6/21/2013
Sapient	RFI	No Decision	6/21/2013

<b>JPMC</b>	<b>RFP</b>	<b>Lost</b>	<b>7/12/2013</b>
<b>Citi</b>	<b>RFP</b>	<b>Lost</b>	<b>7/19/2013</b>
<b>USDA-Natural Resources Conservation Service</b>	<b>RFQ</b>	<b>Lost</b>	<b>7/30/2013</b>
<b>Air Force Special Operations Command, Cannon AFB NM</b>	<b>RFI</b>	<b>Pending</b>	<b>8/16/2013</b>
<b>Sapient Corporation</b>	<b>RFP</b>	<b>Pending</b>	<b>8/21/2013</b>
<b>Ford</b>	<b>RFP</b>	<b>Pending</b>	<b>8/23/2013</b>
<b>Elle k associates, inc for U.S. Army</b>	<b>RFP</b>	<b>Pending</b>	<b>8/26/2013</b>
<b>Dept of Defense- Oahu</b>	<b>RFQ</b>	<b>Pending</b>	<b>9/6/2013</b>

David Holts – Director of Market Sales – reports in:

- Fully staffed w/ 7 BDMs and 4 AMs
- 30 Accounts equaling \$100+ million in revenue
- 24+ scheduled year end CBRs
- 2 notable RFPs – Sapient and Citi
- Implementing Global EY business

Kathy Eicholtz – Director of Sales – Territory Sales

- Fully Staffed – just hired new Boston AE
- Year end CBRs are being scheduled
- Notable wins
  - Govt: AIRP program, ATF award, Army IG program

- Corp: ABC (new business for 10 apts for Miami)

Melissa Moore – DOS – Territory Sales

- Interviewing for open position in Dallas, TX, otherwise fully staffed
- Working on CBRs
- Pending RFPs – Nestle’ – Wins – Raytheon

Jason Luther – DOS – Northwest and Midwest

- Seattle Market still open, just filled Chicago
- Anticipating good 4<sup>th</sup> quarter, as activity is very high for these areas
- Wins – EY Global

I do apologize, but I want unable to connect with the other Directors, including Beth Holtz, Relocation. I will pass along their updates as soon as I get them.

I would like to introduce, TJ Spencer, Vice President of Sales. Ms Spencer began her career with Oakwood Worldwide in 1991. Ms. Spencer has held several positions within the organization as Account Executive, Sr. Account Executive, National Account Manager and Director of Strategic Accounts and Vice President, Worldwide Relocation Alliances, Managing Director, Global. She is recently based out of Nashville, TN. In her current position she manages the US Sales force and franchise sales for both the Oakwood and Execustay brands. She has been active in the relocation industry for 18 years and was instrumental in establishing Oakwood’s global program for third party relocation customers. Ms. Spencer is a Senior Certified Relocation Professional (SCRP) and a Senior Global Mobility Specialist (SGMS) She is a current member of the Employee Relocation Council (ERC).. She is the recipient of an ERC Meritorious Service Award, ERC Distinguished Service Award, and was a Director on the ERC Board from 2000 – 2003 and served on the Board of Trustees of the Foundation for Workforce Mobility. She has been published in Mobility Magazine and has chaired and been a speaker at several relocation related conferences. Ms. Spencer is a graduate of Indiana University, The University of Maryland, and Kellogg School of Management Women in Senior Leadership.

TJ – Strategic Sales Overview 2014 – notes to follow.

Questions / Answers

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