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writing samples

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A Marketing and Strategic Planning Memo Submitted to Roger Beahm of Beahm and Associates, LLC.

BACKGROUND: Marketing consultant Al Ries (of Atlanta-based firm Ries & Ries) wrote a blog post for Advertising Age's website on May 14, 2013. (<http://adage.com/article/al-ries/jcp-walmart-fail-changing-spots/241456/>). In it, Ries notes that historically-strong, well-performing brands with loyal followings experience expensive disconnections when they attempt to change, expand, or grow their brand differently. Sales figures reflect just how deep this disconnection can run – J.C. Penney lost \$985 million in an attempt to upscale rebrand, Mazda has never sold more than 295,737 vehicles per year despite goals to sell 400,000 vehicles in 2016, and low-end car manufacturer Hyundai sold only 3,942 Equus models priced at \$58,000. Brands like Mercedes-Benz and Hyundai make similar strategic choices to appeal to customers differently and to expand customers' accessibility to the brand and brand's image or culture. Ries notes that the best expansion works when it is done within the same business, customer segment/demographic, or brand image.

ASSESSMENT: I agree with Mr. Ries' assessment that a brand must grow and revolutionize its image within the boundaries of what it produces powerfully-well for the customer. His assessment suggests that the goal of a brand's strategic expansion should be growing a brand that aligns with a customer's expectations and needs as well as strengthening that customer's personal perception of the brand to insure future on-brand products, businesses, or partnerships. As well, he addresses the need to invest time and resources into change that customers recognize as different and new, but is also within their understanding of the brand. In turn, the assumption is that business shifts from growing the brand to growing a strong relationship with the customer.

BASIS FOR ASSESSMENT: Brands experience financial and brand image success when they "do what they do best". Ries' Kia example suggests that Kia focused attention on their position as a low-end brand which was an industry in which they are well positioned. In doing so, from 2008 through 2013, they grew their U.S. sales by 104 percent compared to Hyundai's 75 percent growth in the same period.

Brand exposure in a different business or customer segment doesn't guarantee more brand appeal. Hyundai's Genesis and Equus models, built to compete with BMW's and Mercedes' luxury sedans, are two, current examples of a brand (Hyundai) struggling for attention in order to make sales and reach customers. These two models were only 5.4 percent of Hyundai's sales in the U.S., Ries notes.

It requires more time and resources to try to change a brand if customers aren't interested in the change. J.C. Penney's former CEO, Ron Johnson, invested tremendous resources into the change he felt necessary to take "JCP" to the next level – an ill-advised luxury, upscale level. J.C. Penney's loyal customer base did not want that change. Consequently, the brand experienced a downturn in sales and stock value that first year.

OTHER CONSIDERATIONS: A brand's financial growth and potential new customer base depends upon their willingness to take a risk and make a bold choice to position themselves differently. However, such a move does not guarantee profitability. Ries' example of a brand taking on a risky venture such as this is Walmart. Although Walmart is a multifaceted brand with a rich history, strong, financial performance, and loyal customer base, the brand's attempt to launch a luxury line of apparel proved that a risky venture can befall a large retailer thought to be untouchable. The luxury line "[clogged] store aisles and [pressured] profits" the Wall Street Journal reported.

**Excerpt from Global Business Team (GBT) Initiative Proposal for lululemon athletica / Branded: go global.
Submitted to lululemon athletica's CEO, Christine Day; CC: Executive Leadership Team**

WHY: lululemon athletica continues to grow quickly not only domestically (within North America [Canada and the U.S.]), but also internationally (Western Europe, Asia, Australia, and New Zealand). With the projected growth through 2013 as well as over the next five years, there exists an opportunity to connect team members not only across stores, but also across continents - to learn about and from the New Store Opening (NSO) process and develop team members as global strategists armed with current, retail-environment perspective.

If lululemon is committed to 'best-in-the-world' product, culture, grassroots marketing, and community-based strategy, there's opportunity to grow people stronger internationally with real, global perspective in new markets around the world. Get them talking to and learning from each other.

In preparing people to succeed globally, you will prepare the business to go global.

OBJECTIVE: Connect with and learn from international partners, transfer product, people, and community strategy knowledge that leads to growth, establishes an international network, and lays the groundwork for creating a process where education isn't limited to borders. Actively discover who is best in the world (literally) at what they do or who they are for their new markets and new stores.

THE INITIATIVE'S ROLL-OUT:

1. Establish two different GBTs – one for Asia/Australia/New Zealand; one for North America/ U.K./Western Europe.

Why two: Simply put, respect for time and time zones; cluster appropriate time zones/stores/regions together.

2. Select two GBT Team Leaders – one for each GBT; Meg Seitz will lead the GBT for North America, U.K./Western Europe; Will need support locating a GBT leader for Asia/Aus/NZ; Need someone who understands the initiative, the impact, and has a global focus with a desire to grow a network; if anything, he/she should have a Community Connector-like presence.

3. Appoint a Coach for each respective GBT - each GBT will need a coach who is strong in Operations, People Development, In-Store Experience and has at least two years of experience with lululemon; he/she must be a strong leader with a "coach" mentality.

4. Team Leaders and Coaches connect – leaders and coaches connect via e-mail and at least one call to align learning objectives in order to communicate and "recruit" the same "type" of team member from their respective networks.

5. Team Leaders recruit – leader get one month to recruit one potential team member from a region; If there are more than one store per region/country, only one team member is necessary from that region or country. (Example: One team member to represent the three U.K. showrooms.)

RECOMMENDATIONS AS TO HOW TO SELECT TEAM MEMBERS WHO WILL GROW THIS INITIATIVE: These team members should be employees who work in new showrooms/stores (open a year or less; or in the process of opening within the next six months). They are employees from a variety of educational and professional backgrounds who are not necessarily managers, but can speak to the business from a 360-vision. They are mature and responsible activators and futurists who exhibit an appreciation for strategy, global perspective, and growing their personal knowledge and skill base.

Excerpt from What Outlives Granite Published on Huffington Post

I'm slouching in the backseat of a 1960's Ford Galaxie squad car Googling the word 'granite'. Facts pop up. Hard, tough, durable, quality rock. Yosemite National Park's Half Dome is a granite dome. Mount Airy. North Carolina Granite Corporation. Full operation since 1889. World's largest open face granite quarry. Open face means ground level. Granite currently left in the Mount Airy quarry will last another 500 years. 500 years. That's just cool.

The squad car pulls down the hill from the quarry and chugs back through downtown Mount Airy. He parks alongside a suburban street curb and stick-shift-jerks the car into park. He points across the street to a house. Like a lot of local architecture constructed during the same era, this particular house was built with granite. It's mid-size, yet regal; practical, yet luxury. He said they stopped building like 'this' – with granite - when materials got too expensive during the Great Depression. "They don't make them like this anymore," he said. We all just kind of sat there staring at this house. They don't make them like this anymore. "Them" like houses, public buildings, churches, small towns, cities. And "them" - homes, communities, foundations, values.

I needed to get off the phone. I needed to bring to a screeching halt my obnoxious use of quotation marks to describe this place as if it's not real. It's real. This place is just about as real as it gets.

I want a real, granite house. I don't say that with a Veruca Salt cadence. I want what the granite house signifies. What this town inspires. What that television show instills. I want that good, ol' fashion, classic, American experience way of doing things. It's no coincidence that this town, built beside a rock-solid, highquality, long-enduring, almost ageless quarry - inspired a television show and a way of doing things that is, in fact, just that, as well – high-quality, long-enduring, almost ageless. Where did the granite houses go? I get the idea of change or technological innovation or essential cost-cutting to production or labor. I was sitting in the back of a 1960 Ford Galaxie 500 wearing stretchy, skinny denim and imitation-Wayfarer-sunglassesprobably-made-in-China pattering on my iPhone, for crying out loud.

But, where did the granite houses, the solid foundations, the non-negotiable values, the people, places, and businesses who know who they are and stick to that go? Where you shape a house or building with a quality product that lasts? Or you drop what you're doing when someone walks in the door because they're a real, live person? Or you trust people to pay after the tour? Or you're just... a nice guy?

We stayed in Mount Airy the rest of the day. We ate pork rib sandwiches off paper plates and drank coffee out of Styrofoam cups. We split a chocolate milkshake at a diner's counter in red, pleather swivel chairs. We picked up a copy of The Andy Griffith Re-Run Fan Club newsletter.

We met a barber who's been in business since the late 1940's. His entourage of older, gentlemen friends with thick, charming, Southern drawls hung out in chairs lining his shop's wall. They asked where we drove in from and if either of us were married, and when we each said, 'Charlotte' and 'No', they said there are plenty of men in Charlotte. "It could happen tomorrow," one said.

This town, and other towns like it across the country, embody everything that's good, solid, and unassuming about American culture and how we choose to treat each other.

Yes, the world is changing. But, when you're rooted in the most solid foundation – people and places – that built this country, you've got growth potential. Because it lasts - this granite, this community, this television show, this way or life. There are always just enough of the right people around who care enough to preserve that which is good. You just have to be lucky enough to know or to find those people. Their legacy will outlive the granite.

A Q&A Country Analysis for Brazil Submitted to Charles Kennedy

CHARLES KENNEDY: How do you assess country risk in Brazil, particularly with regard to macroeconomic developments and policies? How well has the Real Plan worked?

MEG SEITZ: Financial Times' Brazil Bureau Chief Joe Leahy said it well in his February 2013 column titled "The First Big 'Soft' Power"— "Brazil's global standing has rarely been higher, but the project is only half-finished." If that's the case, 2013 just might be that point of 'half-finished'. Fernando Henrique Cardoso's Real Plan, launched in December 1993, made an impact that reverberates today, and will continue to do so going forward. It set Brazil on a path to economic prosperity that addressed four key issues: inflation, currency depreciation, government fiscal deficits, and government involvement in the economy.

In the grand scheme of things, Cardoso's Real Plan worked. Within five years of the Real Plan's implementation (so, by 1998), Brazil experienced lower inflation rates (annual rate of 3.2%), a new and more stable currency (the Real), an improved foreign exchange system, primary fiscal budget either in surplus or in balance, and cuts in government spending – all points that addressed the Plan's four key issues. It was solid, legitimate economic and fiscal policy reform strong-armed by a consistent, stable political presence like Cardoso at a time when Brazil needed it. From a macroeconomic level though, Brazil suffered when East Asia and Russia suffered increasing its country risk, diminishing capital investment, and exposing Brazil's vulnerabilities and future/increasing risks on the world market.

It's as though the Real Plan positioned Brazil in the last 1990's on a pedestal of a more legitimate standing in the world markets, and especially, BRIC countries – but a pedestal with shaky legs where international upsets and too much government involvement rocked the pedestal too easily.

CK: How attractive does Brazil look to an American MNC in 2009?

MS: In early 2009, Brazil touted an investment grade rating from Standard & Poor's, record-breaking foreign direct investment inflows, an improved external debt profile, and political stability. As well, because political stability is so important to the American culture and way of being, Sula putting aside his own political beliefs to grow Brazil economically, has got to count for something when it comes to investing American money in South America. In late 2009, it's not necessarily a different story, but a fuller story. In October 2009, the Olympic committee announced that Brazil's Rio de Janeiro (the country's second largest city) would serve as host to the 2016 Summer Olympics. That decision brings about a stream of positives and negatives – costs and benefits. But, if anything, it's a signal to the world that Brazil is capable of opening their city, markets, and cultural identity to host an internationally-renowned event on the world stage – spending money to make it happen and pocketing international money as a result of it.

As well, there's increasingly modern and innovative attention as to Brazil's natural resources including agriculture, food production, rainforest restoration, climate change initiatives, environmental issues, and sustainability. A recent study, and subsequent article, of and about Brazil by John Paul Rathbone, Latin America Editor for Financial Times, noted "given that Brazil, the most biodiverse [sic] country on Earth, is home to the world's largest rainforest and river, the trajectory of this country's changing attitudes toward nature and the health of the planet...is of global interest, too."

Brazil's hard work now entails solid footing in social issues that affect the economy – examples: labor and workers' rights issues, the legal environment, crime, and well-known corruption driving underground economics. None elevate Brazil's country risk to a point that changes the outlook. They are issues of which to be aware amid growth, increasing power, and publicity.

Press Release for Bea is for Business, LLC

New Educational Platform, Bea is for Business, Supports Children's Business Education at School

Charlotte-based entrepreneurs launch new educational platform complete with children's book and online resources for classrooms

Bea is for Business, a new, educational platform developed to teach children ages 6-9 the fundamentals of business, launches next month. Based in Charlotte, North Carolina, Bea is for Business is an original, interactive resource that brings business education to students, teachers, and families through a variety of resources for the classroom and home.

The platform is built in accordance with the Common Core State Standards – but with a creative and innovative twist that's realistic and relatable to young people, families, and teachers. At the heart of the platform is one, central, character - Beatrice Banks, "Bea" for short. Bea draws connections between math concepts, communication skills, and teamwork, to implement business ideas. She utilizes business terminology and experiences, such as implementing an assembly line for production, to teach concepts pivotal to the understanding of the current, business environment.

Perhaps the most robust online children's business resource to date, Bea is for Business offers a plethora of means to begin the conversation about business. From the purchasable, flagship children's book and do-at-home activities, to focus groups and teacher's guides, educators of all kinds now have a rich storehouse of material.

Bea is for Business was developed by Jamie A. Brown, MA/MBA and Meg Seitz, MBA. The two entrepreneurs have business experiences ranging from publicly-traded companies, non-profits, family businesses, startup companies, the service industry, retail, and education. And both feel strongly that there's a need to develop business education at a younger age. "It's important to encourage kids to be creative thinkers and leaders," says Brown, who dedicated her work on this project to her two young children. "Kids have excellent innate business skills that just need to be unlocked, reinforced, and given a place to thrive."

The program encourages development and enrichment of decision-making skills that will equip young people to design, or perhaps, launch start-up ventures over summer vacation in lieu of the more common reliance on video games or television. "Bea is a realistically-drawn, American kid who plays soccer and talks on the phone during summer vacation. In essence, she's every kid." Seitz says. "She doesn't necessarily have all the answers. But she and her friends figure it out. They learn together and make an impact. 'It was fun to work together to start a business,' says Bea."

A hallmark of the platform will be kids' ability to interact with Bea, and Bea with them as she carves out her legacy as a business consultant. Parents are encouraged to work with their children to develop business ideas and to e-mail Bea for feedback. The idea, then, is that parents, teachers, and children all take an active part in learning together about business. This winter, Bea is for Business was test-driven in 3rd grade classroom in Charlotte. Students responded well, writing unsolicited letters with color illustrations addressed to Bea as ideas and strategic planning for her next business adventure.

As well, the Bea platform is built to serve as an opportunity for parents and teachers to interact and connect through learning opportunities at home and school. "From our research, we've talked to teachers who are looking for different, innovative, out-of-the-box ideas for their students," Seitz says.

Excerpts from Moxy Events' Business Plan and Investor Presentation

NOTE: Moxy Events ("Moxy") is a Charlotte, N.C.-based athletic-event promotion company.

GETTING INTO OUR CLIENTS' HEADS: You know you're Moxy when... You live boldly on the edge of Generation X and Generation Y. You're climbing your way up the corporate ladder - the right way. Glass ceiling? You plan to blast right through that baby. You drink three half-priced locally-brewed beers on a Thursday night at a local restaurant or bar. You 'check in' there on Facebook. You tag three or four friends. You tweet. You filter pictures on Instagram. You hashtag everything, #obviously. You're glued to Malcom Gladwell's *The Tipping Point*, USA Today online, and CrossFit journals. You listen to not-yet-mainstream bands, electric mixes, and folky-rock mash-ups with a familiar backbeat. You claim you discovered The Lumineers, and everyone else is just following your lead. You're psyched for your grand return to Austin City Limits. You DVR SportsCenter, *New Girl*, and *The Office*. You'll watch 'em when you get home from that 1.5 day business trip to Chicago. You rent a condo or apartment in a recently revitalized neighborhood. You go home for Christmas, update Grandma on life in Charlotte, but you're at a midnight concert with friends in Miami for New Year's Eve. You'll pay to take part in a charity 5k run or WOD. Because your momma raised you right.

(NOTE: When you partner with us, you'll connect instantly with this population. No joke.)

WHO BREATHES MOXY: We never discriminate. That's not our jam. But, let's be honest – we work with a healthy, handful of ladies and gentlemen in their late 20's and early 30's who are well-educated, working professionals who live in urban apartments or condos, frequent local establishments (restaurants, bars, stores, etc.), and rely heavily on social media channels to stay informed.

WHAT IS MOXY? Moxy is the way you choose to do something. It's your way to move, to sweat, to be. It's how you show up for the world. That gut-wrenching choice to put yourself out there. That deliberate, yet 'what-the-hell-why-not' decision to be 100% yourself. Because you just don't give a shit what anyone else says about that. Moxy is the lifestyle we choose to live every, single day. We believe there's power and possibility in always getting better. We challenge our comfort zones. Moxy is building something different starting with you. Together we are going beyond ourselves to new places and new challenges. If we didn't stay true to that sort of fearlessness, that sort of effort - we'd be pissed.

We've been super successful in event planning. But, we're not saying that's our only game. We've got game. And we've got some big ideas that will connect Charlotte in a new, fresh, aggressive way.

WHO ARE THE DESIGNATED DRIVERS? Charlotte-residents Coby Kraft and Brad Schamel are 29 years old. They grew up together as childhood friends in New Albany, Indiana outside Louisville, Kentucky. Kraft works for the family lighting business. Schamel is a Ranger in the U.S. Army and was a Company Commander of a long range surveillance company. They both speak candidly about the moment they realized they wanted to launch their own business together approximately six months ago. "I remember thinking, 'we can do this; let's just go for it,'" says Kraft. (You think we're that easy? If you want the rest of the story, you'll have to ask us.)

Join Moxy Events on March 9 from 8pm to midnight for Moxy Madness at Midnight - a yoga rave gone mad. What it is: intense, aggressive, interval training by Fight Gone MAD balanced out with hot, fast yoga led by some of Charlotte's famous and talented yoga instructors. We're about to get mad, sweaty, and flexible. Who's in?