



Pomeroy Lodging

NORDIC SPA BRAND

August 8, 2024

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CONFIDENTIALITY STATEMENT

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Overview

Pomeroy Lodging has accepted Incite's recommendation to move forward with the development of a new, independent brand for its Nordic Spa vertical. The Nordic Spa business has huge growth potential and is well positioned to be a market leader. The development of a compelling brand will allow Pomeroy Lodging to build brand equity in a name/brand that it owns and will support its goal of offering a best-in-class customer experience.

Incite has a 25-year track record of building visual identities rooted in best-in-class design and always built from strategic insight. With over 200 visual identities and multiple design awards and accolades under our belts, we feel confident we can build a lasting and compelling brand identity for the Pomeroy Nordic Spa vertical.

Naming is a creative exercise to capture the spirit, story, and goals of where Pomeroy Lodging wants to take its Nordic Spa business. At the brainstorm stage, there are multiple ways to look at naming a business: connecting the name to values, to an aspiration, to a practical feature of the business or a made-up word that is fun to say and distinctive. And while there are practical considerations like URL/social handle availability, pronunciation concerns, and trademark availability, the more powerful force in brand naming is ensuring the name has an origin story that can be leveraged and connects equally with the company as it does your audience.

Modern visual identities in the wellness space have strong emphasis on minimalism and simplicity. Brands are opting for clean design that can be easily translated into a variety of spaces – digital presence, packaging and tangible goods, and space design all need to be considered when building a compelling visual identity so that the brand integrity stays intact and can move seamlessly through advertising, events, interior design and future business extensions like branded wellness products.

Incite and Pomeroy have a long history, and we are keen to advance this important work. Our proposal outlines our recommended process, including timelines and budget. In addition, we have provided a portfolio of relevant client work: <https://incitestrategy.ca/pomeroy/>



Why Incite

Incite is a recognized thought leader for marketing and brand strategy. With more than 25 years of experience, **this engagement is a prime opportunity to leverage Incite's expertise in building compelling brands and visual identities, our experience working with growth-oriented, brand-driven clients, and our reputation as a trusted Pomeroy partner.** Incite's strengths and Pomeroy Lodging's needs are well aligned and Incite is a preferred partner to help achieve your long-term objectives.

1. **History and company insight.** Incite's long and close working relationship with Pomeroy Lodging will help make this project a success. We understand the key players inside the company and are familiar with the historic decisions that have brought the company to where it is today. Our past work developing the initial Kananaskis Nordic Spa brand and our more recent work to recommend the appropriate brand architecture moving forward will both inform the project and ensure we can hit the ground running. As time is of the essence, we believe the established understanding and relationships are valuable in making a seamless transition into this engagement.
2. **Brand building experience.** Incite has 25 years of experience building visual identities rooted in best-in-class design and built from strategic insight. We can leverage our experience of what works and what doesn't, including how to best manage the process, secure buy-in, and build internal engagement around the new brand. Our work on over 200 brands can be used to guide Pomeroy Lodging through this important work.
3. **Creative that is driven by strategy.** Incite is a strategy firm first and foremost. We leverage strategy to help organizations grow, build strong brands, and enhance their marketing to achieve specific objectives. Too often, creative drives strategy, and branding is reduced to an exercise in graphic design and creating flashy pitch decks. For Incite, a strong brand begins with strategy and understanding how best to position a company or product into a market. From there, a clear market position and differentiated value proposition is developed that forms the foundation for all future marketing efforts. Finally, a brand is more than a logo. It is an experience and Incite works with clients to ensure the entire experience is aligned to strategy. Our strategic backbone will help ensure the new Nordic Spa brand is grounded in strategy and set up to help Pomeroy Lodging achieve its overall business objectives.

PROVEN EXPERIENCE

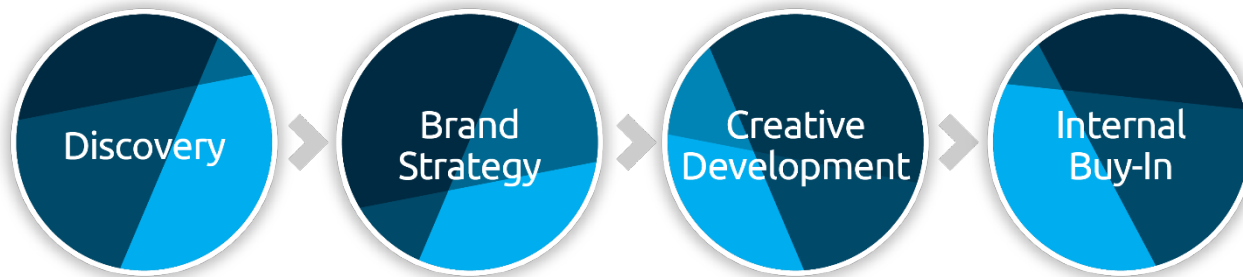
- Alta ML
- Argus
- BGE Indoor Air Quality
- Bliss Yoga Spa
- Champs Boxing Gym
- Edmonton Convention Centre
- Explore Edmonton
- Edmonton Global
- Fort Edmonton Park
- Kananaskis Nordic Spa
- Pomeroy Kananaskis Mountain Lodge
- Pomeroy Lodging
- Stollery Children's Hospital Foundation
- Telus World of Science
- United Sport & Cycle
- University of Alberta



Approach and Methodology

Brand Strategy Development Process

Incite will work with Pomeroy Lodging to confirm the Nordic Spa vertical's brand position in the market, develop a name, visual identity, and brand guidelines to align with this desired positioning, and develop a brand story and messaging to effectively communicate this important change internally to prepare for a successful external launch. Incite's process typically includes significant research to help inform the development of the brand. In this case, given Incite's background work with the Nordic Spa brand and Pomeroy Lodging's significant internal work to define its brand and future objectives, no additional external research will be required to support this project. The following outlines the overall Incite brand development process.



A Comment on Project Scope

Please note that the proposed process is based on our understanding of the requirements from our initial meeting with Emilie Pageau-Bisson. This proposal provides a recommended process, however, Incite is open to discussing how we further refine or tailor the approach, or adjust scope if timelines, budgets, or other considerations require it.



1. Discovery

NORDIC SPAS, FROM YOUR PERSPECTIVE.

By engaging with key project team members, Incite will establish an accurate picture of Pomeroy Lodging’s vision, business objectives, and overall branding and marketing goals for the Nordic Spa vertical. Incite will seek to gain a better sense of Pomeroy Lodging’s current perceptions of market position, including SWOT (strengths, weaknesses, opportunities, and threats), differentiation, and ideal client. The Discovery phase includes the following activities:

Kickoff/Discovery I meeting:

- 1.5-hour meeting with Emilie to cover introductions, expectations, and a review of relevant brand documents and past work/resources

Discovery II meeting:

- Two-hour facilitated session with core Pomeroy project team to explore strategy, brand, differentiation, messaging, and target audiences

Review of relevant resources, including:

- Current and past marketing and communications strategies
- Current branding and marketing tools being used
- Past customer feedback, surveys, analysis, etc.
- Media and other relevant publications
- Business plan, strategic plan, organizational chart, and other internal documents

Deliverable

Creative Brief (a summary document detailing current brand assessment and outlining key project needs, goals, and expectations. This brief requires review before we move on to the next stage).

Timeline: August 15 – 31, 2024



2. Naming

DEVELOPING A NEW NAME FOR NORDIC SPAS

At this stage, Incite will research and recommend a new name that ensures the Nordic Spa vertical is positioned effectively for the future. This work will build off Incite's Nordic Spa brand architecture and will leverage existing Pomeroy Lodging market and customer research to ensure alignment with market needs. The name will capture the spirit, story, and goals of where Pomeroy Lodgings wants to take its Nordic Spa business and will serve as the foundation for all creative development.

Incite will brainstorm, research, and recommend a new name. This process is iterative and Incite will include Pomeroy Lodging in the feedback process to ensure alignment. Incite typically provides a final recommended name, with 2-3 alternatives based on other directions explored during the brainstorming and development phase. For all final recommendations, Incite will conduct URL availability and recommendations, and provide high level due diligence on availability and competitive risks (i.e. note that Pomeroy Lodging will be responsible for accessing a legal opinion on the name and to secure trademark protection).

Deliverable

Name Recommendation (this presentation deck outlines key alternatives explored, final recommendation, and all URL and competitive consideration research).

Timeline: September 1 – 20, 2024



3. Visual Identity

NEW NORDIC SPA BRAND VISUALIZED

Once a new name has been agreed upon, the creation of an aligned identity will support Pomeroy Lodging's Nordic Spa vertical in living out the recommended brand experience with the consistency, effectiveness, and visual integrity required to build confidence and inspire the target audience. Incite will present recommended identity, with 1-2 alternatives based on other directions explored during the brainstorming and creative development phase

Incite will:

- Design and present recommended visual identity including logo, font, and colour palette
- Create logo file assets in standard formats required for print and digital application typically including horizontal and vertical versions, colour and b&w, eps and jpg.

Deliverables

Visual Identity Presentation (this presentation provides an overview of the new visual identity, including logo and brand rational to support it).

Timeline: September 20 – October 15, 2024



4. Design Concept and Visual Identity Guidelines

NORDIC SPA BRAND BROUGHT TO LIFE

Incite will develop comprehensive brand guidelines, including in-use examples for both print and digital applications to help Pomeroy Lodging envision how the new visual identity will look and feel across different mediums.

Understanding how a visual identity extends into the various applications helps you see it brought to life. We will explore creative concepts like space design, signage, advertising applications, how the logo shows up in digital and package design. While only directional in nature and not taken to final art, these applications of the logo help extend the design from a logo to a brand and bring to light some of the practical considerations like accessibility or readability and usability at different sizes, complementary colours and textures, and movement within a digital space.

Deliverables

Visual Brand Guidelines (this document outlines all visual identity applications and rules of use, and includes multiple in-use examples for space design, signage, digital, SWAG, etc.)

Timeline: October 16 – 31, 2024



5. Brand Story

NEW NORDIC SPA BRAND, DEFINED

A brand story or narrative is a way to convey emotional relevance of the brand with your audience. This sets the stage for describing the rationale and strategy behind the name and visual identity, but told through a lens of connection. It creates common language that the company can use to build staff understanding and excitement, and is the foundational with which you can create a voice and tone for how to talk about the brand.

Incite will develop a brand story to describe the rationale and strategy behind the name and visual identity. This will incorporate and align with existing Pomeroy Lodging work to define its Nordic Spa brand and messaging and offer an integrated take to serve as a foundation for the (re)launch of the brand.

This will also document all existing Pomeroy Lodging brand experience guidelines, and additional recommendations Incite believes are needed to further bring the new name and new visual identity to life.

Deliverables

Brand Guide (this will incorporate the visual brand guidelines with the new brand story and all relevant and existing Pomeroy Lodging Nordic Spa brand materials into a single, comprehensive Brand Guide for the Nordic Spa vertical)

Timeline: October 16 – 31, 2024



6. Internal Buy-In

POMEROY LODGING'S PATH TO BUILDING BUY-IN FOR THE NEW NORDIC SPA BRAND.

This phase allows Incite to work closely with Pomeroy Lodging to help ensure the new brand is used to build engagement and excitement internally. Incite will develop an internal roll out plan, and support in coordinating an internal staff engagement presentation. We will work with senior leadership to ensure they are aligned and prepared to unveil this exciting new brand to the entire Pomeroy team. Incite will be available on an advisory basis to help troubleshoot or respond to any key staff questions or concerns that emerge following the rollout.

Deliverables

Brand Rollout Presentation

This presentation is used by Pomeroy Lodging to roll out the new Nordic Spa brand internally.

Timeline: November 1 – 30, 2024



Project Team

This engagement will be led by Alana Williams (Principal) and Darren Tonn (Partner and Creative Director), with executive oversight and strategic support from Ted Kouri (Founder and President). Our client management model ensures each client has a dedicated team that develops strategy, oversees creative development, and connects additional Incite team resources to Pomeroy's account as needed.

Other members of Incite's team may engage on the account over time, but the individuals listed above will form the core project team and ensure a consistent group for Pomeroy Lodging to engage with throughout our working relationship. Project team member bios and client highlights are shared on the following pages.



Ted Kouri, BCom, MBA

FOUNDER, PRESIDENT

Ted is the founder and president of Incite. After graduating from the University of Alberta with distinction and a Bachelor of Commerce degree, he went on to complete his MBA through the Queen's University Executive MBA program. Ted has 25 years of marketing and consulting experience, along with a proven ability to engage in complex business strategy and multi-stakeholder environments. Ted has experience working with private and corporate clients in the areas of brand development, issues management, market positioning, and communications strategy.

Ted's areas of expertise include a knack for problem solving, business planning, stakeholder engagement, and strategy. His "get it done" attitude makes him a proactive leader, and motivates those around him to follow suit. Ted supports client strategy and brand work and is responsible for overseeing the client delivery teams and management of Incite.

Ted has volunteered with the University of Alberta Venture Mentoring Service and Confed Hockey, and has served on the boards of the Edmonton Community Foundation, Entrepreneurs' Organization, Synergy Network, and AIESEC Canada. He is a recipient of the 2004 Edmonton Chamber of Commerce Small Business Owner of the Year Award and the 2008 BDC Young Entrepreneur Award.

RELEVANT EXPERIENCE AND INVOLVEMENT:

- **Edmonton Global** Positioning and Branding
Led client relationship management, market research plan development, facilitation of sessions, strategy development, presentation to board
- **Wood Buffalo Economic Development Corporation** Positioning and Brand Strategy
Client relationship management, market research plan development, strategy development, presentation to board
- **Fort Edmonton Park** Brand Development
Strategy oversight, facilitation of planning sessions, presentation to board, positioning and brand development
- **AltaML** Brand and Positioning Strategy
Market positioning and corporate rebranding
- **Pomeroy Kananaskis Mountain Lodge** Positioning and Branding
Client relationship management, strategy support, positioning and messaging writing, employee engagement
- **9Triple8Jasper and Hokanson Capital Inc.** Positioning and Branding
Client relationship management, strategy support, positioning and messaging writing
- **University of Alberta School of Business** Messaging and Brand Campaign
Strategy development, facilitation of sessions, brand development



Darren Tonn, BDes

PARTNER, CREATIVE DIRECTOR

As the creative catalyst at Incite, Darren brings to his role as creative director an array of artistic abilities in addition to two decades of design experience. His lifelong pursuit of passion for art and visual expression is bolstered by his Bachelor of Design degree from the University of Alberta. Darren has extensive experience designing for print and various digital formats—including websites, video, and animation—while also leading branding and rebranding initiatives for clients in the private, not-for-profit, and public sectors.

In his over 20 years with Incite, Darren has played a major role in many significant projects, contributing to teams that have won awards from the Advertising Club of Edmonton, International Association of Business Communicators, and Edmonton Event Awards. He works closely with Incite's talented team of designers and writers to bring ideas, messaging, and client objectives to life. Before joining the team at Incite, Darren owned and operated his own design firm, which provided a full range of design services to clients.

Today, Darren is heavily involved in the Edmonton creative community with his work as an artist and role as the past president of the Advertising Club of Edmonton. Focused always on the possibilities, Darren leads the creative services team forward with his creativity, passion, and drive.

RELEVANT EXPERIENCE AND INVOLVEMENT:

- **Roy Group** Multiple projects
Strategy support, visual brand development, materials and brand support
- **United Sports & Cycle** Brand
Strategy support, visual brand development, materials, brand architecture strategy and brand support
- **Edmonton Global** Positioning and Branding
Strategy support, visual brand development, materials and support
- **Harvest Sky Economic Development Corporation** Regional Brand Strategy
Strategy support, visual brand development, materials and brand support
- **Pomeroy Kananaskis Mountain Lodge** Positioning and Branding
Strategy support, visual brand development, materials and brand support
- **Alberta Cancer Foundation** Brand
Strategy support, visual brand development, materials and brand support
- **Fort Edmonton Park** Branding and Positioning Strategy
Strategy support, visual brand development, materials and brand support
- **University of Alberta School of Business** Messaging and Brand Campaign
Strategy support, visual brand development, materials and brand support



Alana Williams, Bilingual BCom



PRINCIPAL

Alana has led some of Western Canada's biggest companies and organizations in their marketing efforts over the course of her 20-year career in advertising, marketing and engagement. A problem-solver for her clients, motivational coach for teammates and a highly effective project manager, she loves helping companies figure out the difference they want to make in the world and then finding a fresh and exciting way to bring it to life.

Over the course of her career, she has built an excellent understanding and working knowledge of brand building and management with a passion for the marriage between research insight and consumer behaviour. Following that passion, she led and operated a market research and communications firm that specialised in stakeholder engagement, public engagement, consumer research, marketing strategy, and customer profile development for 4 years as CEO.

Internationally, the work Alana has led has been recognized in Communications Arts, Graphis, Applied Arts, the Webby's, Marketing Awards and Cannes Lion. Closer to home, her marketing work has been awarded over 40 Advertising Club of Edmonton awards, Anvil Awards, Digital Alberta Awards, and International Association of Business Communicators Capital Awards.

The same desire to capture people's imaginations and see something new brought to life has also fueled Alana's community contributions. Named a Top 40 Under 40 in Edmonton's Edify Magazine, she has been a founding member of four Edmonton philanthropic efforts, responsible for over half a million dollars direct donation and funding to variety of organizations including the Edmonton Public Library and Zebra Child Protection Centre.

RELEVANT EXPERIENCE AND INVOLVEMENT:

- **United Way of Alberta Capital Region**
Brand Perception Research, Consumer Segmentation and Target Market Profile Development, Marketing Strategy
- **Western Canada Lottery Corporation**
Advertising campaign development, execution and management for Sport Select, LottoMAX, WesternMax, Lotto 6/49 and Western 6/49
- **STARS**
STARS Lottery campaign development, execution and management
- **EPCOR and Encor by EPCOR**
Brand strategy, marketing strategy, marketing collateral development, campaign development and execution, naming and identity development, internal communications support, customer service communications support, website development, customer loyalty and retention strategy development
- **Canadian Western Bank**
Brand identity development, brand positioning, and go-to-market launch strategy and execution for Canadian Direct Financial
- **Interior Savings Credit Union**
Brand strategy, advertising strategy, one-to-one marketing
- **Edmonton Economic Development**
Brand positioning, strategy and visual identity development for various divisions including: Tourism, Trade and Investment, Meetings and Conventions, Edmonton Conference Centre, Edmonton Innovates, Edmonton Marathon. Multiple communications, marketing collateral and advertising campaign development.



Pricing

Please note that all costs are subject to change given significant modifications to the nature, scope, or deliverables of the project. Fees do not include GST. Fees do not include third-party costs (e.g., event venue or catering costs, printing, website hosting, long distance travel and related costs if required, etc.). Deposits are non-refundable.

This is not a contract. The information provided is solely for estimating purposes. For the purposes of an estimate, the information below can only be current within 30 days of the posted date.

Item Description	
1. Discovery	
2. Naming	
3. Visual Identity	
4. Brand Guidelines	
5. Brand Story	
6. Launch Plan	
Total Fees	\$50,000.00



About Incite



Corporate Profile

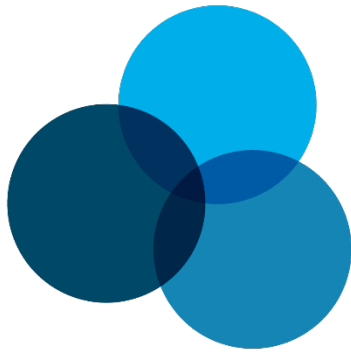
Founded in 1999, **Incite is an Edmonton-based strategy firm specializing in growth, brand, planning, and communications.** We help organizations make informed decisions, and we provide them with the strategic roadmap to move forward with clarity and confidence. Our team brings expertise in mergers and acquisitions, strategy, research, business planning, marketing planning, stakeholder engagement, change management, brand assessment, and communications. These professionals collaborate to guide and empower organizations through the thinking, decisions, and execution required to drive growth, position organizations and communities, align communications, and connect with relevant stakeholders.

Since our inception, clients have partnered with Incite to access our strategic expertise, business networks, and relationship-driven philosophy for growth. We work collaboratively with clients to solve complex problems and unlock new growth opportunities.



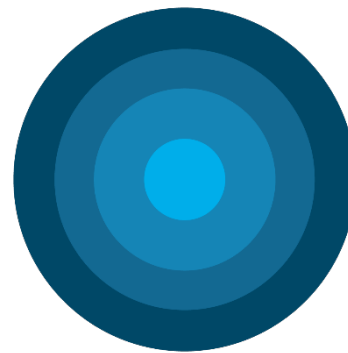
Our Philosophy

Incite believes that organizations succeed when they have a clear vision and position in the market, align their organizational resources seamlessly, and connect with the right people and opportunities in the market. This approach underlies our work with clients to help them achieve their objectives.



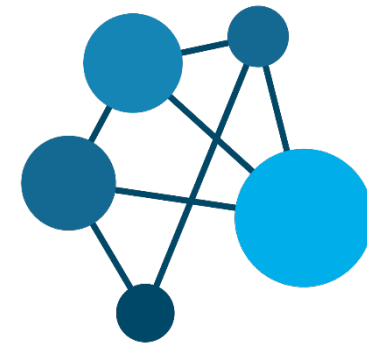
Clarify

Organizations need clarity to confidently move in the right direction. By taking a 360° view of each organization, Incite identifies that pivotal point where your organization's strengths, market needs, and unique differentiation intersect. That intersection helps define market position and clearly outlines the best path forward.



Align

All organizational resources need to seamlessly integrate with and support strategy. Visual identity, organizational process, business development activities, and key stakeholder communications need to align to deliver a strong and cohesive brand experience.



Connect

Authentic connections with your customers, employees, and community partners build trust and loyalty. Incite works with organizations to identify opportunities to strengthen existing connections and leverage key influencers to build lasting relationships and sources of referral.



Services & Capabilities

From market expansion and brand development, to supporting post-merger integration and building internal engagement, Incite's strategic approach helps clients to better understand their market, clearly articulate value, align organizational resources, and connect with key stakeholders to achieve success.



Market Research

We delve into client's market to validate assumptions, identify areas for improvement, and uncover key observations to support organizational decision making.

- Client and market insights
- Customer experience
- Employee feedback
- Market analysis
- Competitor assessments



Marketing & Branding

We design strategies that support business objectives, including the development of a clear roadmap that allows clients to move forward with confidence.

- Marketing strategy and execution planning
- Branding
- Customer experience
- Prospect and influencer targeting
- Business development training
- Strategic communications





Organization & Culture

We align organizational resources, and foster strong internal cultures that enhance customer experience, build consistency, and ensure everyone within the organization is an effective ambassador.

- Recruitment
- Change management
- Corporate communications
- Employee engagement
- Culture management



Strategy & Advisory

We facilitate decision-making and help organizations build team alignment in areas of strategic importance.

- Board services
- Strategic planning
- Mission, vision, and values development
- Leadership and team retreats
- Strategic issues management



Community Engagement

We work with help organizations rethink their approach to community engagement.

- Fund development
- Community investment strategy
- Organization and event sponsorship
- Public engagement
- Stakeholder consultation
- Stakeholder engagement



M&A Advisory Services

Incite provides strategic expertise at every phase of the deal.

Pre-Deal:

EBITDA Growth & Positioning for Sale

- Strategic planning
- Market strategy
- Deal readiness assessment
- Brand assessment and enhancement

Deal:

Transaction Readiness & Due Diligence

- Customer loyalty and revenue analysis
- Brand perception audit
- Stakeholder communications
- Marketing and business Development assessment

Post-Deal:

Post-Merger Integration & Transformation

- Marketing and sales growth plans
- Brand strategy and development
- Change management
- Culture and communications advisory



Contact

If you have any questions or would like to learn more about how Incite can help your organization succeed, please contact us as per below.

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