

**PROPOSAL TO
FREDERICK WILDMAN & SONS
FOR THE CHARTREUSE BRAND**

BY

**THE ORCA PARTNERSHIP
DECEMBER 30, 2011**

MISSION:

To increase case sales of both Chartreuse Green and Yellow products by a factor of 200% in the 750 ml. and 375 ml. sizes within 18 to 24 months.

OVERVIEW:

Chartreuse is a venerable and legendary brand with an unrivaled flavor delivery. That said, it is still largely unknown, untried and therefore unappreciated and never enjoyed by the vast majority of Americans of legal drinking age.

DISTRIBUTION CHALLENGE:

A combination of relatively low consumer awareness, trial and lack of specific seasonal or event triggered use-occasions conspire to create relatively low volume and shelf velocity in a large number of on-premise and off-premise retail accounts of the most top tier establishments.

BRAND STRENGTHS:

Chartreuse in both its green and yellow iterations offer consumers a completely unique flavor experience because of its time-honored secret formula and entrusted recipe held by three monks.



CURRENT DRINK RECIPE PROMOTION:

A review of the drink recipes on the current Chartreuse website lead us to several observations:

- 1) The names are hard to remember
- 2) They use multiple ingredients
- 3) They lack emotional impact and 98.6 appeal

THE ORCA STRATEGIC MARKETING VISION:

ORCA Strategic Consulting uses our four-step ***O-R-C-A process*** to create highly-leveraged sales increase opportunities based on exploitable consumer behavioral insights.

Organization – opportunity identification and marshalling of resources

Reality – testing and perfecting in a beta-test market setting to validate assumptions in a real world setting

Creativity – the addition of high-impact compelling emotionally impactful creative work that creates heightened awareness, immediate trial and repeat use occasions

Action – the precision orchestration and implementation of promotion, advertising, on-premise and off-premise point-of-sale and Internet-based social media campaigns



In our **O-Phase** work, we have studied the market and find that huge opportunities exist to drive the distribution and sales for both Chartreuse products.

We have identified a unique configuration of marketing and promotional assets and partners that can enrich the Chartreuse brand's natural appeals, time-honored traditions and values as they simultaneously provide promotional wing span that will engage and attract tens of thousand of consumers in a highly human and very personal way.

In our **R-Phase** work, we have discovered that our initial suppositions were correct. In discussions with bartenders in various top-tier settings, we learned that there was a vague awareness of Chartreuse. Very few establishments had it present and even fewer had any idea of how to serve it short of “on the rocks,” or “...with soda, I think?”

We had to have it special ordered in the highest volume and most prestigious wine department of a leading supermarket retail chain. Other wine and liquor outlets, had to search for Chartreuse, and not finding it, offered to “get it for us in a few days.” Many said, “We don't get much call for it.”

In our **C-Phase** work, we ran our creative concept by a number of consumers who found it both appealing and personally engaging. Many indicated that they would consider trying Chartreuse because they were intrigued by both flavor curiosity and the appeal of the promotional offer.

In the **A-Phase** work, we tweaked our creative to make it clearer in terms of story and more compelling and engaging in terms of the offer.



THE CREATIVE CONCEPT EXECUTION:

The Trophy Husband & The Golden Girl



THEN

NOW



ALWAYS



FOREVER

Chartreuse was created because youth is often wasted on the young!

Chartreuse as unique as you.



Taste the beguiling magic of 130 Alpine Herbs and 3 Monks.



THE LOVE OF YOUR LIFE

Share a photo moment that captures the essence of your life together. Pick the era. Pick the vintage. Does it show laughter? Compassion? Joy? Wonder? Awe?

Or, is it all of the stars and sky above?

Of course, it is because you two star crossed lovers have been *One* forever.

www.loveofmylife.com

Short Glass: The Trophy Husband
Tall Glass: The Golden Girl
Drink recipes available online at www.loveofmylife.com

WIN A LIFE CASTING OF YOUR HANDS BY WORLD RENOWNED SCULPTOR DON WIEGAND



Don Wiegand's sculptures are in the Vatican, The National Churchill museum and private collections worldwide. Notables such as Bob Hope, August A. Busch, Jr., Jack C. Taylor and Mel Fischer have been created by Don.

If your photo is one of the 10 selected by our Love and Romance Panel in 2012, you and the love of your life and 4 special friends will join Don in his studio for a life casting of your hands and dinner at Annie Gun's.

Submission deadline December 31, 2012. For contest details and how to submit your photos, please visit our website www.loveofmylife.com.

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AN ARTISTIC TRIBUTE TO ENDURING LOVE

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DRINK EXECUTIONS AND EVENT CATALYST:

The Trophy Husband – *a reversal of the “Trophy Wife” gender characterization.*

Green Chartreuse over crushed ice in a rocks glass

Topped with Fresca or Diet Fresca – regular Fresca is great, but the Black Cherry Citrus is surprisingly remarkable!

Dust with zest of lime or add lime twist

The Golden Girl – *a double entendre that flatters blondes and brainy simultaneously.*

Yellow Chartreuse over rocks in a tall glass

Topped with Mello-Yello or Diet Mello Yello

Dust with lemon zest or add lemon twist

ANNUAL EVENT CATALYSTS:

The annual wedding anniversary or personal romantic date anniversary – the way to celebrate The Love Of Your Life.



THE MARKETING INGREDIENTS:

World renowned sculptor Don Wiegand – his work is in the Vatican, he has recently created the epic sculpture of Sir Winston Churchill for the National Churchill Museum. The Wiegand Foundation created and awards *The Spirit Of Hope* medal in collaboration with the Bob Hope family to one member of the U.S. Armed Services and the Coast Guard at the Pentagon each year. A special casting of Don's has also been selected as the donor gift for contributors by *The Statue Of Liberty Foundation*.

The Emotional Impact of Love – we tap into the very essence of enduring romance. *The Love of Your Life...*

The Beguiling Flavor Promise of Chartreuse – taste the inspiring artistic magic 130 Alpine herbs and three monks can create. The very words: **ART** and **USE** are imbedded secretly in the word Chartreuse. To make it is an art. To use it is artfully bequiling.

An Enduring Treasure Is Created For Generations – public relations and word-of-mouth promotional opportunities are built-in and abound in a program that is universally appealing with an everlasting timeliness in terms of personal and legacy appeals and brand loyalty.

Non-Seasonal – the concept can be rolled out on a market-by-market basis using local top-tier media and social networking.

On-Premise and Off-Premise Applications – Easy trial in bars and restaurants. POS displays in-store.

Simple Drinks – No complicated multiple ingredients.

Easy To Remember and Emotional and Flattering Names – fitting to the two people who make up the traditional duo in the “love of my life” equation.



THE MARKETING INGREDIENTS: (Cont'd)

Top Tier Target – Affluent Americans with HHI of \$150,000+ in urban and suburban markets. Age 45+, sophisticated and active, propensity for art appreciation, culture and time-honored values.

Moderate and Sophisticated Drinkers – who consume less total volume, but still want a discerning flavor and adult beverage experience. They see “herbal” products as an extension of natural herb benefits – perhaps possessing some other desirable herbal attributes. An excellent pre or post dining choice.

Soft Drink Partners – Coca-Cola has two tier-two brands in need of trial and consumption support:

The Trophy Husband = Fresca and **Diet Fresca** (multiple flavors) and **The Golden Girl = Mello-Yello**.

Extendable Annual Promotion – can time differently in various regions of the country to allow for maximum local market impact and distribution support both on and off premise. We can also stagger the selection of winners by region to maximize PR exposure and spread the castings out over time to make them even more personal.

Allows For Tremendous Local Media Coverage: Both promotional adverts in local media: IE: *Chicago* and *San Diego magazines*, local “foodie” publications, affluent niche community newspapers – *Grosse Pointe* and *Ladue News*, regional books – *Southern Living* and *Sunset* and selected AARP publications.

PR Sampling Events and Social Media – opportunities for pre-promotion and post-promotion. Presentation party and tasting for family and friends with media attendees. Internet coverage on facebook galleries.

Consumer Opt-In List Captured Via Internet – collect thousands of names, addresses and email addresses from entrants on website.

Friends of Chartreuse – Search for your picture in our “*Love of Your Life*” Gallery. Create new brand wearables – *subtly tasteful and overtly romantic. “I’m the Golden Girl.” And “I’m the Trophy Husband!”*



WIEGAND FOUNDATION CONTRIBUTION:

The Wiegand Foundation will receive a minimum \$3000.00 contribution for each life casting creation. Of this \$3000.00, \$2000.00 may be a tax deductible expense since the Wiegand Foundation is a 501(c)3.

The other \$1000.00 will not be deductible since it is for tangible goods received in materials and labor costs attendant to each casting's preparation for final presentation @ \$500.00 per hand.

5 winners = \$15,000.00

10 winners = \$30,000.00

The Wiegand Foundation welcomes contributions above the minimum \$3000.00 level for these highly personal family legacy life castings.



WINNERS' EXPERIENCE INCLUDES:

- Round trip air fare for each winning couple and 4-selected friends
- Accommodations at DoubleTree Inn and Spa in Chesterfield, MO.
- \$1000 Shopping Spree at Plaza Frontenac
- The Casting Experience at Don Wiegand Studios – in a historic landmark building
- Dinner with Don Wiegand at 4-Star Annie Gunn's Restaurant (@\$150.00 per person prix fixes)
- Video DVR of the casting experience
- Commemorative Photo Album of Experience Autographed by Don Wiegand
- Life Casting of Clasped Hands with display stand
- Feature story released to local print and broadcast media
- Presentation Party in recipients home or Chartreuse-favored restaurant

Total estimated cost per each of 5 winners is \$10,000.00 or \$50,000.00 total



ORCA COMPENSATION OPTIONS:

I. ORCA Execution of Entire Program:

- One-Time Fee For Use of Intellectual Property: \$100,000.00 paid in one installment
- Annual Shared Success Compensation: 75-cents per 750 ml bottle and 40-cents for every 375 ml incremental bottle of Chartreuse sold based on 2011 import, sales and depletion data. Contract duration 5-years
- Annual Creative Execution and Supervision: For Promotion, PR, Advertising, POS, Internet and Social Media \$10,000 per month – 50 hours monthly at \$200.00 hr. - \$120,000.00 per year for 5-years
- Media Placement: 5% commission to cover buying and trafficking
- Production Mark-Up – Authorized printing, digital media, photography, talent fees and et cetera are marked up 17.65%
- Out-Of-Pocket: Billed Net – travel and per diem as approved in advance, long-distance and authorized vendor support costs

II. Cost To Buy ORCA Intellectual Property For Execution By Others:

- \$500,000.00 in a one-time payment for full assignment of all rights.

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