



Visit Florida Keys & Key West Ongoing Outbound Sales Support & Pipeline Development Program Proposal with Optional CRM Data Entry

About SDR: A Company Overview

- Founded June 1996
- Primary Purpose: Customized Prospecting and Market Research
 - Business to Business
 - Pro-Active/Outbound
 - Cost Efficient
- More than telephones and technology: The right people, leadership, and commitment to quality



What Makes Us Unique?

Our Program Development

- We believe in building every program around each specific customer's needs. All programs have different objectives. That is why we customize everything from start to finish.
- We believe in building "intellectual capital" or "marketing intelligence". It is the most powerful tool you can have today as long as it is managed and utilized effectively.
- Our methodology allows you to reach out and communicate with a higher volume of new potential customers and to focus more attention on your best customers.
- Our state-of-the-art prospecting platform gives you the ability to develop a more personal relationship with your customers and provides better market research data. This gives stronger reinforcement to your marketing programs because they are based on better information. Yesterday and today's customers may not be your same customers tomorrow!

Our Culture

- We provide the highest level of service, quality and integrity to all of our clients.
- A team of dedicated interviewers working exclusively on your behalf. This creates a true understanding and total commitment to our clients.
- Technology is only as good as the people who manage it. We see technology as a tool...a means to an end. You must have the right people.

Our People

- We recruit high quality interviewers
- Training process is ongoing:
 - Starts with the methodology of telesales and market research (phone skills)
 - The terminology for a specific industry (i.e., hospitality, meeting planning, etc.)
 - Once those are mastered, we conduct training on the specific objectives of your lead gen program.
 - Review of Product, Goals, and Objectives of the program, and the strategy for data capture.
 - Review of Script / Role-playing.
 - Ongoing training and feedback

Quality Checks

- All interviewers are monitored on an ongoing basis to ensure that they have a professional phone manner and are adhering to the basic script parameters.
- All prospecting efforts are recorded for quality assurance. Recorded interviews are reviewed by SDR Project Coordinators and used for training purposes.
- All recordings for surveys resulting in a lead are reviewed prior to sending.

Program Overview

Through an ongoing outbound sales support and pipeline development program, Strategic Database Research (SDR) will support Visit Florida Keys & Key West by identifying and engaging group meeting planners whose meetings align with the Destination's current sales priorities, including priority market segments, key feeder geographies, and applicable booking windows. SDR's outreach is designed to complement existing sales tools and inbound platforms by adding live planner insight, context, and intent that cannot be captured through query-based or automated systems alone. The program may be directed toward both new prospects and existing or inactive accounts and may support broader sales initiatives such as incentive-focused outreach, executive-level group targeting, and re-engagement efforts as priorities evolve. The overall objective is to strengthen Visit Florida Keys & Key West's top-of-funnel coverage and opportunity pipeline, enabling the internal sales team to focus on informed follow-up, relationship development, and business conversion.

Market Segment(s):

- Targeted outreach to group meeting planners aligned with Visit Florida Keys & Key West's sales priorities, with primary emphasis on incentive programs, executive retreats, and team-building groups
- Select corporate and association outreach, including insurance, financial services, and pharmaceutical organizations, prioritized by booking window and weekday need

Geographical Target(s):

- Primary focus on Midwest and Northeast feeder markets, with flexibility to support additional or emerging markets as priorities evolve
- Geographic targeting may be refined throughout the program in collaboration with Visit Florida Keys & Key West's sales leadership based on market performance and pipeline needs

In addition to utilizing SDR's proprietary database, Visit Florida Keys & Key West may direct SDR to conduct outreach using select client-provided or third-party data sources to support specific sales priorities, incentive-focused initiatives, or targeted re-engagement efforts. These sources may include:

- *Client-provided account or contact lists, including active, inactive, or priority accounts*
- *Third-party or subscription-based intelligence platforms used by Visit Florida Keys & Key West, including IDSS/Tempest or comparable tools*
- *Initiative-specific datasets provided in support of evolving sales priorities or targeted outreach efforts*

** All client-provided data used for prospecting will remain the property of Visit Florida Keys and will be handled under SDR's confidentiality and non-disclosure obligations.*

Program Objectives

1. To design and execute an ongoing outbound outreach program that delivers high-quality, actionable group meeting opportunities aligned with Visit Florida Keys & Key West's current sales priorities, booking windows, and demand patterns.
2. To support pipeline development and business-mix optimization through outreach to both new prospects and existing or inactive accounts, with emphasis on longer-window incentive and executive-level group opportunities.
3. To uncover, qualify, and distribute sales-ready opportunities supported by live planner insight, intent, and responsiveness, enabling more informed and effective follow-up by the internal sales team.
4. To provide flexible outreach support aligned with evolving sales initiatives, including incentive-focused campaigns, vertical-driven targeting, and selective re-engagement efforts as priorities shift.
5. To complement outbound prospecting with targeted email follow-up, including the capture and distribution of verified email opt-ins from planners requesting additional destination information.
6. To offer optional CRM data entry and alignment support, including entry of SDR-generated opportunities and contact updates, to support data consistency and internal sales workflows when requested.

Through these efforts, the program's outcomes will provide Visit Florida Keys & Key West with actionable sales intelligence and qualified group opportunities that support near-term sales execution as well as longer-term pipeline development. Prospecting results and live planner feedback will help inform market deployment, demand patterns, and evolving sales priorities, while optional CRM data support, when utilized, contributes to a more consistent and usable foundation for future outreach and re-engagement.

SDR Initiatives

1. Conduct targeted outbound outreach in support of Visit Florida Keys & Key West's current sales priorities, including incentive-focused outreach, executive-level group targeting, and selective re-engagement of inactive or dormant accounts.
2. Leverage a combination of SDR's proprietary data and client-directed sources to support initiative-specific prospecting aligned with defined priorities, rather than broad-based volume campaigns.
3. Support sales and marketing efforts through targeted email follow-up, including the capture and distribution of verified email opt-ins from planners requesting additional destination information.

4. Execute outreach using customized scripts and interviewer training aligned with Visit Florida Keys & Key West's messaging, brand positioning, and evolving sales priorities.
5. Provide optional CRM data entry and alignment support, including entry of SDR-generated opportunities and related contact updates, when requested.

Sample Outbound Prospecting Script/Questionnaire

| | |
|-------------------------|--|
| Organization Name | <i>(SDR will develop an opening paragraph in conjunction with the client's objectives)</i> |
| Address | Viable Meeting type(s) |
| City/State/Zip Code | Next Open Meeting Date(s) |
| Contact Name | Past Hotels/Destinations |
| Contact Title | Destination(s) that they are presently considering? |
| Telephone | Number of rooms peak night |
| Alternate Phone | Arrival/Departure pattern |
| E-mail Address | Use a third party? If yes, name and contact? |
| Role in Planning | Do you issue a RFP? Date: |
| Originating List/Source | Decision date |
| | Decision maker(s) |
| | Sales contact? (Attempt to schedule a time and a date) |
| | Additional Comments |

Note that this is a sample data capture, and final script/questionnaire will be developed based upon program objectives.

SDR Reporting

- ❖ Real-time distribution of detailed Qualified Prospect PDF documents for each uncovered group meeting opportunity*
- ❖ Weekly Excel Workbook Reports*
 - Highlight results of contacted records by disposition category
 - Measure and illustrate sales booking cycle times of uncovered group meetings opportunities
 - List all follow-up opportunities in three categories
 - Qualified Prospects: Contacts with a specific upcoming viable meeting
 - Verified Information Requests: Contacts with interest and the desire for a conversation with a sales manager
 - Additional Email Requests: Contacts with interest in receiving email about the destination

**See samples on the following page*

Sample Qualified Prospect (Lead)

|   | |
|---|---|
| Contact Information | |
| National Financial Leadership Council 900 Condor St, Suite 116 Chicago, IL 60602 | |
| Email: mel_brigders@natfinance.org Phone: (800) 320-7737 ext 310 | |
| Melanie Bridgers Vice President, Member Engagement | |
| Role in Planning: Decision Maker | |
| History / Viability | |
| Past Destinations: | Recent programs have been hosted at The Cove at Atlantis (Bahamas), Naples, FL, and Scottsdale, AZ. |
| Would Source Florida Keys?: | Yes. |
| Meeting Needs | |
| Next Viable Meeting Date: | October 2026 |
| Meeting Type: | Annual Executive Leadership & Recognition Conference |
| Attendees: | 225 attendees |
| Rooms Block: | Approximately 180 rooms peak |
| Nights: | 3 nights |
| Arrival / Departure Pattern: | Tuesday to Friday |
| Meeting Space Requirements: | One general session for all attendees and 4 breakout rooms for concurrent leadership and strategy sessions. |
| Final Decision Maker: | The final decision is made by Executive Committee with input from staff and third-party planner. |
| Other Potential Locations: | Other locations under consideration include Reno, NV; Boise, ID; and Colorado Springs, CO. |
| Sourcing Process | |
| Sourcing Process Begins: | January 2026 |
| RFP for this Meeting?: | Yes, their HelmsBriscoe rep sends out RFPs. |
| RFP Date: | January 2026 |
| Final Decision Date: | March 2026 |
| Utilizes Third Party Planner?: | Yes, they work with Jane Hansen with HelmsBriscoe, out of Melville, ID. |
| Action Step: | Melanie would welcome follow-up call on October 30, 2025 |
| Comments: | The group prioritizes destinations that offer a distinctive attendee experience while supporting productive meetings, and has expressed interest in coastal resort destinations that balance accessibility with a strong sense of place |
| Original Call Date: | 10/15/2025 |
| SDR Interviewer: | Steven Holtz |
| List Source: | CRM_OLD_TRACES_090125 |
| SDR ID: | 1312/kd |
| <i>If you have any questions regarding the information on this profile, please contact SDR at 561-395-8807. Qualified Prospects are time-sensitive.</i> | |

Sample Weekly Report



Key West Big Pine Key & The Lower Keys Marathon Islamorada

Weekly Report

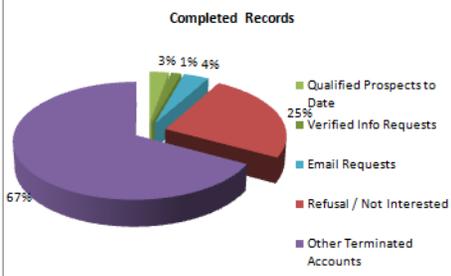
January 1, 2026



| Program Start Date | September, 2025 |
|-----------------------------|-----------------|
| Qualified Prospects to Date | 28 |
| Verified Info Requests | 15 |
| Email Requests | 37 |
| Refusal / Not Interested | 241 |
| Other Terminated Accounts | 655 |
| Prospect Qualification Rate | 2.9% |
| Average Rooms Peak Night | 107 |

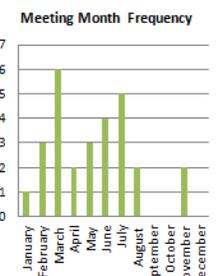
| Recent & Upcoming RFP/Sourcing Start Dates | |
|--|----------|
| 1 Kenter Energys | Nov-2025 |
| 2 International Fuel Tax Association | Nov-2025 |
| 3 The Trial Network | Nov-2025 |
| 4 Gypsum Association | Dec-2025 |
| 5 National TTT Society | Dec-2025 |
| 6 Applied Computer Security Associates | Jan-2026 |

| Recent & Upcoming Decision Dates | |
|---|----------|
| 1 Handbell Musicians Of America | Nov-2025 |
| 2 Union Tank Car Company | Nov-2025 |
| 3 Applied Computer Security Associates | Jan-2026 |
| 4 Utah Mechanical Contractors Association | Feb-2026 |
| 5 National Association Of Independent Colleges & Universi | Feb-2026 |
| 6 Natgun Corporation | Feb-2026 |



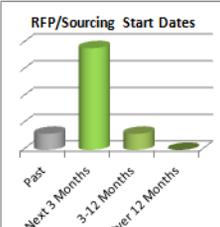
Completed Records

- Qualified Prospects to Date: 25%
- Verified Info Requests: 3%
- Email Requests: 1%
- Refusal / Not Interested: 4%
- Other Terminated Accounts: 67%



Meeting Month Frequency

Bar chart showing frequency of meetings per month from January to December.



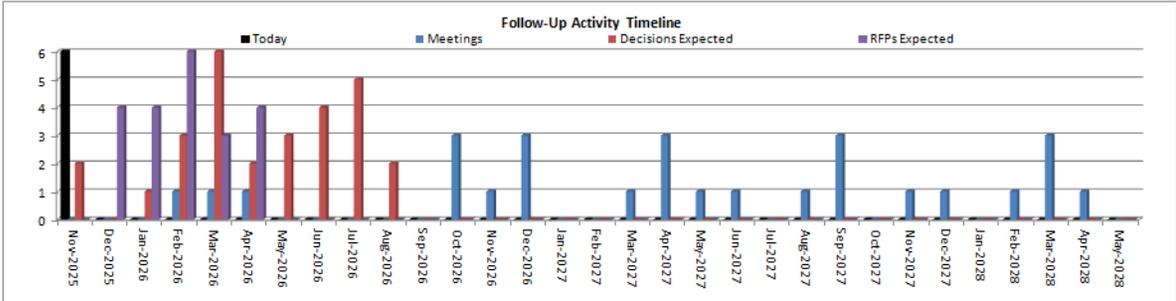
RFP/Sourcing Start Dates

Bar chart showing RFP/Sourcing start dates: Past, Next 3 Months, 3-12 Months, Over 12 Months.



Decision Dates Timeline

Bar chart showing decision dates: Past, Next 3 Months, 3-12 Months, Over 12 Months.



Follow-Up Activity Timeline

Bar chart showing follow-up activity from Nov-2025 to May-2028. Legend: Today, Meetings, Decisions Expected, RFPs Expected.

| Additional Initiatives | | | |
|--|-----------------|------------------|---|
| Project Description | Primary Contact | Date(s) Called | Results / Notes |
| Incentive & Executive Group Outreach | Ed | June 2025 | 64 Calls / 14 Connects / 4 Follow-Up Requests |
| Midwest Corporate & Incentive Outreach | Ed | July 2025 | 58 Calls / 12 Connects / 3 Follow-Up Requests |
| Northeast Financial & Insurance Outreach | Ed | July-August 2025 | 55 Calls / 11 Connects / 3 Follow-Up Requests |
| Executive Retreat & Leadership Group Support | Kaire | August 2025 | 6 Opportunities Identified / 4 Information Requests |
| Pharmaceutical & Life Sciences Outreach | Ed | September 2025 | 62 Calls / 13 Connects / 4 Follow-Up Requests |
| Association Executive-Level Group Outreach | Kaire | September 2025 | 3 Appointments / 2 Additional Interest |
| Weekday Group Demand Development Outreach | Ed | October 2025 | 59 Calls / 10 Connects / 3 Follow-Up Requests |
| Targeted Planner Re-Engagement Email Follow-Up | Kaire | October 2025 | 8 Interested Respondents / 3 Qualified Prospects |
| Strategic Account Re-Engagement Outreach | Ed | October 2025 | 17 Contacts / 3 Follow-Up Requests |

| Qualified Prospects for: Hyatt Regency Grand Cypress | | |
|--|--|--|
| Date | Company Name | Location |
| 9/1/2017 | ACH | Orderville, V |
| 9/6/2017 | Oratered Consulting | Weeping M |
| 9/11/2017 | Firestarter Contractors | Circleville, |
| 9/12/2017 | Seratasper | Deadman I |
| 9/15/2017 | Micaer USA | Macnutt, M |
| 9/17/2017 | Conal | Athabasca |
| 9/17/2017 | National Organization of Groups and Associations | Speers, IL |
| 9/19/2017 | Visinconal, Inc | Lipps, UT |
| 9/22/2017 | International Cooperative of Synergenic Nations | Lone Sasa |
| 9/24/2017 | Family Functions Worldwide | Stalker, W |
| 9/25/2017 | ALM Group | Germfask, |
| 9/28/2017 | Acttum | Bowbells, I |
| 9/28/2017 | Pers Technology | Sinking Va |
| 9/28/2017 | Mics Capital | Evansport, |
| 10/3/2017 | Tigratec Group | |
| 10/3/2017 | Technovera Consulting | |
| 10/7/2017 | AREARE Ventures | |
| 10/9/2017 | Seare Incorporated | |
| 10/13/2017 | Gratmel Systems, Inc | |
| 10/14/2017 | Deviconent Ventures | |
| 10/15/2017 | American Association of Co | Charles Group |
| 10/15/2017 | Fiscal Awareness Group | |
| 10/20/2017 | Saclec, Inc | |
| 10/21/2017 | Applicroley USA | IFM Efector |
| 10/23/2017 | Silechintion Incorporated | |
| 10/23/2017 | Ated Germany | |
| 10/25/2017 | Gologintems Devices | |
| 10/30/2017 | Castle Construction | |
| 11/3/2017 | Ated Design | |
| 11/8/2017 | Sology | Adult & Community Educators of Florida |

| Company | Verified Information |
|-----------------------------------|-----------------------------------|
| Price Morgan Reed Lic | Price Morgan Reed Lic |
| Norwich University | Norwich University |
| Genesis Health System | Genesis Health System |
| The Marketing Collaborative | The Marketing Collaborative |
| Living Church of God | Living Church of God |
| Arc Best Corporation | Arc Best Corporation |
| Northeastern Prepress Association | Northeastern Prepress Association |
| TD Synnex | TD Synnex |
| Cross Country | Cross Country |
| Office of the State Courts Admin | Office of the State Courts Admin |

| Number of Nights | Total Potential Room Nights |
|------------------|-----------------------------|
| 3 | 1,350 |
| 4 | 1,520 |
| 3 | 1,110 |
| 1 | 270 |
| 3 | 600 |
| 2 | 1,200 |
| 3 | 740 |
| 2 | 550 |
| 3 | 1,650 |
| 2 | 900 |
| 5 | 1,890 |
| 2 | 840 |
| 3 | 1,110 |
| 3 | 1,110 |

| Company | Contact Info |
|------------------|--------------|
| press | |
| dt@NAHater.com | |
| indeama.com | |
| Norton.com | |
| feld@Blueinc.com | |
| @SureLLC.com | |
| Inteon.com | |
| Stories.com | |
| @Amerion.com | |
| Natiety.com | |

Summary
Prospect Log
Verified Information Requests (VIRs)
Email Requests

Sample Integrated Email Automation

Monthly Reminder for Sample Company

Sent:
To:

Hi Team,

As you know, each Monday night, you receive the SDR weekly report, which summarizes your program's activity to-date. While the Summary tab (tab 1) already highlights those organizations that have upcoming decision-dates we know you are very busy and don't want you to miss an opportunity.

Therefore, we have initiated this secondary notification to alert you to the upcoming decision dates expected this month.

These qualified prospects have site-selection

| Company Name | Decision Date |
|-------------------------------------|---------------|
| Civil Aviation Medical Association | Jun-25 |
| Condominiums Business Parks Inc | Jun-25 |
| Hamilton Corporation | Jun-25 |
| Equestrian Association | Jun-25 |
| Council On Administrative Education | Jun-25 |

These qualified prospects are likely to have a

| Company Name | RFP |
|---------------------------------|--------|
| Smith Corporation | Jun-25 |
| Florida Financial and Insurance | Jun-25 |
| Travel Advisors | Jun-25 |
| Valjean International Logistics | Jun-25 |
| Animal Protection International | Jun-25 |

As your partner, we are eager to hear about your experiences. Thanks for keeping us updated.

From: FloridaKeys@strategicdatabase.com
Sent: Monday, October 14, 2025 4:00 PM
To: wcruz@asag.org
Subject: Florida Keys & Key West - Introduction
Attachments: [2026 Florida Keys planner guide.pdf](#)

Good Afternoon Warren,

Thank you for taking the time to speak with me.

I will send over the information you provided to my colleagues at Visit Florida Keys & Key West, and they will reach out to you in the near future as your main point of contact moving forward. They will be able to answer any questions you may have.

In the meantime, please [click here](#) to visit the meeting planner portal on our website or see the attached brochure for more information on why The Florida Keys & Key West would be the perfect destination for your organization's next meeting.

Best Regards,
 Pamela Evers



PROGRAM PRICING

Start-up costs

\$1,500.00 (one-time)

- Program and technological development
- Customization of **script(s)** and questionnaire(s) based upon program objectives and current sales initiatives
- Customization of **databases** i.e., merge/purge, de-dupe, data formatting
- SDR will build initiative-specific target lists that meet criteria set by Visit Florida Keys
- Development of all **reports** and analysis
- Interviewer **training** call on the destination, messaging, and priorities provided by Visit Florida Keys
- Programming of automated **email distribution** for Verified Information Requests (VIRs) and Email Requests (REs)

6 Months Outbound Sales Support & Pipeline Development Program

\$3,150.00 (monthly)

- **Outbound prospecting**/qualifying account potential for Visit Florida Keys
- **Dedicated Interviewer specialists** prospecting on behalf of Visit Florida Keys
- **Tradeshaw and sales-mission support**, including pre-event outreach and post-event follow-up calls
- Ongoing **Qualified Prospect** distribution
- Automated post-call **follow-up emails** to planners requesting additional information
- **Weekly** distribution of productivity and activity **reports**
- **Conference calls** with the designated contacts when applicable
- **Administrative Team**: Project Manager, Database Manager, Operations Manager, and Quality Control Lead

Additional (Optional) CRM Integrations:

\$2,500.00 (monthly)

- **Direct Entry** of SDR-generated opportunities into Visit Florida Keys' CRM, where applicable
- CRM **data support** for opportunities and contacts uncovered through initiative-based outreach
- **Updating, merging, and de-duplication** of affected contacts and accounts uncovered during SDR outreach
- **Categorization** and **tagging** based on campaign, vertical, geography, or event type to support future targeting and reporting
- Alignment with Visit Florida Keys' **data management** and CRM management **SOPs**

SDR's program serves as a cost-effective extension of Visit Florida Keys & Key West's sales team, absorbing time-intensive outbound outreach, reporting, and optional CRM data support. This enables internal sales leadership to focus on relationship management, strategic follow-up, and business conversion without the fixed overhead associated with additional staffing resources.