



AMR

ACCELERATED MARKET READINESS


COACHING FOR
TOURISM OPERATORS



Atlantic Canada
Opportunities
Agency

Agence de
promotion économique
du Canada atlantique

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“Tranquility Cove Adventures participated in the AMR Program in 2015.

The most valuable part of the program was to have an experienced tourism professional come in and look at my business with a fresh set of eyes. He saw things I didn’t. He identified opportunities to enhance our curb appeal and ways to service our customers with online bookings. We updated our signage, painted the storage shed, and invested in all-season staff uniforms. While these may seem like small changes, I didn’t realize what first impressions we were unknowingly making on our customers until someone pointed it out. As well, our new online bookings are consumer-friendly and save me a lot of time.”

**Perry Gotell, Owner
Tranquility Cove Adventures**



GROWING TOURISM IN ATLANTIC CANADA

The ACOA Tourism Innovation Action Plan (TIAP) guides tourism development in Atlantic Canada. TIAP is designed to advance Atlantic Canada's tourism competitiveness and capacity by placing a greater emphasis on small and medium enterprise (SME) growth and innovation. The Plan supports business development and capacity building throughout the region. The focus is on clustering, value-added product development, season extension, and mobilizing destinations to leverage the power of the internet and social media. The Accelerated Market Readiness (**AMR**) program has been developed with the following pillars in mind.

The two pillars of the TIAP are straightforward:

1. **Increase revenues and profits** from tourism efforts and operations by adding value to existing products and experiences, creating new products and experiences, extracting a higher return from visitors, and attracting new visitors.
2. **Season Extension** by working with tourism operators and industry stakeholders to build capacity to extend the season beyond the traditional high season.

Three core activities are key to achieving tourism growth and are promoted in the TIAP:

- **Product clustering** focused on geographic areas and sectors within tourism
- **Development of unique, value-added products and experiences** that appeal to visitors
- **Strengthening online connectivity and digitization**, including innovative marketing approaches that incorporate advocate/influencer marketing, social media strategies, and online advertising

“As the new owners of the Fox Point Inn, we had an idea of plans we wished to implement; however, we weren't sure where to start. The AMR program provided us with a professional consultant with extensive experience in the tourism field, who provided us key takeaways that we could begin to implement into our business. We would strongly recommend the AMR program to any new business owners in the tourism industry or existing operators looking to upgrade their establishment.”

**Scott and Marion, Owners
Fox Point Inn**

ACCELERATED MARKET READINESS (AMR) PROGRAM

The **AMR** program strives to grow Atlantic Canada's tourism industry one operator at a time by offering tourism SMEs individualized, **one-on-one expert coaching**. The Coach provides the Operator with guidance on implementing **actionable, achievable, affordable, and measurable initiatives** to increase revenues, profits and extend the season.

AMR provides Operators with an opportunity to engage with an independent, qualified tourism expert on issues specific to their operation. It provides solutions to “what keeps them awake at night”, and helps them determine if they are truly market-ready, meaning their products or experiences are ready and able to be purchased directly by consumers.

OBJECTIVES

- to increase standards of excellence in products that are market-ready, therefore being more responsive to emerging tourism trends;
- to help build innovation and expertise among a community of operators of shared interest;
- to bring tourism operators together with professional tourism coaches over 12 months, exposing them to new ideas and approaches; and
- to assist provinces, regions and communities in realizing their tourism plans.

TARGET AUDIENCE

The **AMR** program is designed for **individual tourism operators**. It has been successfully used by many ranging from small B&B-type operations to large-scale tourism resorts, experiential operators, food service businesses, retail operations, and attractions.

The program is not only a tool for tourism operators to enhance their business and market readiness, but is also **designed to work with clusters of five individual operators** at a time from a defined geographical area. As like-minded operators from the same region participate in the program, the possibility exists for partnership or packaging within the cluster of operators.



“We participated in the AMR program in 2015 and found it to be an awesome experience! Our coach was great, very professional and knowledgeable. We were at a crossroads at the time. We knew we wanted to make some changes and had our ideas, but it helped get an outside perspective from a professional. Our coach helped us with our burning questions and shared many other ideas with us, from staffing, to processes, to decor. The final report was amazing, a complete overall look at your business and the personal follow-up was great with suggestions and tools to help achieve success. We would recommend this to any other businesses, whether your needs are big or small. It is a worthwhile experience!”

**Steve and Christine Murphy, Owners
Blue Mussel Cafe**

AMR STAKEHOLDERS

AMR Stakeholder and Role	Responsibilities
ACOA – Tourism Atlantic <i>Role: Program champion, custodian and strategic link to ACOA’s Tourism Innovation Action Plan</i>	<ul style="list-style-type: none"> ● Maintains and updates AMR program for relevance ● Generates and maintains AMR Program Handbook and program promotional materials ● Educates ACOA regional offices and potential partners on AMR ● Undertakes regular and meaningful evaluation of the program ● Certifies Coaches for AMR and ensures Coaches have access to up-to-date materials needed to deliver the program effectively
ACOA Regional Office <i>Role: Regional program champion and ACOA partner in AMR project</i>	<ul style="list-style-type: none"> ● Understands AMR and recommends regional utilization ● Provides an overview of the AMR program to the Proponent using the program handbook and promotional materials ● Supports the Proponent in the development of its funding application ● Provides stakeholders with relevant program materials ● Supports the Proponent and Project Committee throughout the project, including participating in the initial meeting with Coach, post-coaching topline report, and reviewing of 6 and 12 month Progress Topline Reports ● Retains project information, including evaluations, topline reports, Operator AMR Coaching Reports, Market Readiness Work Plans, and incorporates into client files where appropriate
Proponent <i>Role: AMR project coordinator and strategic link to local/regional tourism plan(s)</i>	<ul style="list-style-type: none"> ● Overall project coordinator ● Prepares application for funding to ACOA and other funders ● Establishes and coordinates a Project Committee ● Promotes the program, recruits Operators in appropriate clusters, and ensures Operators understand the program and commitment required ● Leads the AMR Process as outlined in the next section, including: <ul style="list-style-type: none"> ○ contracting and liaising with the Coach ○ administering MOUs with Operators ○ introducing Coach to Operators ○ organizing Project Committee meetings to discuss topline reports ○ administering surveys after coaching sessions and at 12 months ● Ensures all AMR reports prepared by the Coach are included on the project file
Coach <i>Role: AMR Coach/ advisor/ sounding-board</i>	<ul style="list-style-type: none"> ● Meet with Proponent/Project Committee for project overview and review of Operators ● Follows the AMR Process as defined in the next section ● Conducts regional research to understand relevant sector context ● Provides the Proponent with bio for email introduction to Operators ● Via email, sends Operators the <i>Getting to Know the Operator Discussion Guide (Appendix D)</i>. Using this information, undertakes pre-coaching business assessments ● Schedules site visit and conducts assessment ● Develops coaching reports and work plans and reviews them with Operators ● Schedules 6 and 12 month coaching sessions with Operators, unless otherwise agreed to by the Proponent ● Leads meeting with Project Committee to review topline insights and issues gathered ● Conducts 6 and 12 month coaching sessions with Operators ● Develops progress reports and updates work plan, as well as a topline summary report of insights gathered ● Shares reports with appropriate stakeholders
Operator <i>Role: Implementer of actions to enhance market-readiness of business</i>	<ul style="list-style-type: none"> ● Understands operator role in AMR and commitment required, and signs MOU with Proponent ● Engages fully with Coach in pre-coaching business assessment, including defining priorities ● Dedicates at least ten hours to the program, including four hours for initial site visit and discussion with Coach ● Dedicates time to meet with Coach for review of the report and next steps, and participates in the 6 and 12 month coaching sessions ● Completes Operator Satisfaction Survey within two weeks of receiving ● Contributes to progress reports at 6 and 12 months by tracking actions taken related to the AMR project and any adjustments made ● Offers testimonial in support of AMR if appropriate
Project Committee <i>Role: Monitor the project, work with Coach to identify and address common challenges or opportunities</i>	<ul style="list-style-type: none"> ● Assists in recruiting the optimal Operators to participate in the program ● Meets with Coach following the coaching sessions to discuss topline reports ● Works with relevant stakeholders to develop a strategy to respond to regional needs and opportunities ● Meets with Coach following the 6 and 12 month coaching sessions to discuss topline report

THE AMR PROCESS



BUILDING AN AMR PROJECT	
Introduction to AMR	
<ul style="list-style-type: none"> • ACOA Economic Development Officer (EDO) walks through AMR with the Proponent using this document • Proponent, with support from ACOA EDO, develops application, identifies other partners, etc. • Proponent establishes a Project Committee inclusive of ACOA EDO, other funding partners, etc. • Guided by AMR project objectives and with support from Project Committee, Proponent identifies a strategic cluster of potential tourism operators to participate in the program 	
Contracting	
<ul style="list-style-type: none"> • Proponent issues RFP to the list of ACOA-certified Coaches, using the RFP template (Appendix A) • Following evaluation of proposals using Evaluation Grid (Appendix B), Proponent selects and contracts with Coach • Coach meets with the Proponent or Project Committee to review project deliverables, timing (late summer/fall), etc. 	
Operator Recruitment	
<ul style="list-style-type: none"> • Proponent circulates program marketing materials to solidify interest and finalize list of potential operators • With Project Committee input and in consultation with the Coach, Proponent confirms participating Operators • Proponent ensures the Operator fully understands the Program and expectations of the Operator • The 2 parties sign MOU (Appendix C) • Proponent introduces the Coach to Operators by email 	
IMPLEMENTING AMR	
Getting to Know the Operator	
<ul style="list-style-type: none"> • Coach connects virtually one-on-one with Operator to gather pre-coaching background materials using the <i>Getting to Know the Operator – Discussion Guide</i> (Appendix D) at least 1 week prior to site visit • Coach schedules site visit with Operator • Based on information gathered, priority discussion areas are identified by Coach and Operator 	
Site Visit/Coaching Session and Work Plan	
<p>Operator</p> <ul style="list-style-type: none"> • Onsite coaching will include: <ul style="list-style-type: none"> ○ Coach site visit, with opportunities to experience the operation with Operator; ○ One-on-one discussion over several hours on Operator opportunities/challenges; and ○ Discussion of approach(es) to address issues identified. • Coach prepares Coaching Report and Market Readiness Work Plan for Operator using templates (Appendices E and F) • Typically, within 24 hours of site visit, Coach and Operator review the coaching report and work plan, identify priorities and adjust as needed • Coach and Operator schedule the 6 month follow-up coaching session 	<p>Project Committee</p> <ul style="list-style-type: none"> • Coach considers all information gathered from Operators and prepares a topline report within 10 days of the last site visit for Project Committee regarding opportunities, potential partnerships, challenges and considerations for capacity building • Proponent schedules a meeting with the Coach and Project Committee within two weeks of completion of site visits to review the topline report

Evaluation of Site Visit/Coaching Session and Work Plan	
<ul style="list-style-type: none"> Proponent issues Operator Satisfaction Survey (link provided) within 2 weeks of site visit Proponent completes Proponent Satisfaction Survey, (link provided) within 2 weeks of meeting with Project Committee 	
6 Month Coaching Session and Progress Report	
<p>Operator</p> <ul style="list-style-type: none"> 6 Month Coaching Session will include: <ul style="list-style-type: none"> Coach and Operator (by video or phone) to discuss activities/initiatives undertaken to address urgent actions outlined in Market Readiness Work Plan; Robust one-on-one discussion on Operator opportunities/challenges over past 6 months; and Discussion on priority actions for next 6 months. Coach prepares AMR 6 Month Progress Report (Appendix G) and updates Market Readiness Work Plan (Appendix F) for Operator. Coach and Operator schedule 12 Month Coaching Session 	<p>Project Committee</p> <ul style="list-style-type: none"> Coach prepares a topline report that provides an overview of the opportunities and/or challenges identified by the Operators during the 6 month Coaching Session Proponent schedules a meeting with the Coach and Project Committee upon receipt of the report
12 Month Coaching Session & Progress Report	
<p>Operator</p> <ul style="list-style-type: none"> 12 Month Coaching Session will include: <ul style="list-style-type: none"> Coach and Operator by video, or phone to discuss activities/initiatives undertaken to address urgent actions outlined in Market Readiness Work Plan since the 6 month Progress Report; Robust one-on-one discussion on Operator opportunities/challenges over past 6 months; and Discussion on go-forward priority actions. Coach prepares AMR 12 Month Progress Report (Appendix H) and updates Market Readiness Work Plan (Appendix F) for Operator 	<p>Project Committee</p> <ul style="list-style-type: none"> Coach prepares a topline report that provides an overview of the opportunities and/or challenges identified by the Operators during the 12 Month Coaching Sessions Proponent schedules a meeting with the Coach and Project Committee upon receipt of the report
Evaluation at 12 month point of AMR Program	
<ul style="list-style-type: none"> Proponent issues Operator Satisfaction Survey (link provided) within 2 weeks of final Coaching session Proponent completes Proponent Satisfaction Survey (link provided) within 2 weeks of meeting with Project Committee 	
Project Wrap-Up	
<ul style="list-style-type: none"> Proponent ensures all Operator surveys are completed Proponent ensures all relevant information are on file (i.e. work plans, progress reports, top line reports, etc.) ACOA Tourism Atlantic and Regional Office meets with Coach to review feedback received through Operator and Proponent Satisfaction Surveys and to discuss his/her experience, opportunities for program improvement, etc. 	

AMR BUDGET

While the **AMR** budget may vary based on the number of Operators participating, each project is expected to allocate one day of Professional Fees to work with the Project Committee, at least 3 days of Professional Fees per Operator to prepare and develop Coaching Report and Work Plan, and at least 1 full day per Operator for follow up coaching.

Sample Budget (based on 5 Operators):

Costs		Financing	
Professional fees	\$16,000	Operator contribution: 5 @ \$400	\$ 2,000
Administration costs	\$ 1,600	ACOA/Province /Other	\$15,600
Total Cost	\$17,600	Total Financing	\$17,600

"The AMR program was extremely beneficial to our distillery as it provided us with the needed expertise to focus our energies and attention on specific tasks going forward. It also gave validation for the steps that we have already taken and valuable suggestions as to areas that our business could explore for future growth and opportunities. Their final report will be an important resource for our company as we move forward. We strongly recommend other companies take advantage of their expertise and knowledge."

**Jill Linqvist, President/Distiller
Raging Crow Distillery**



AMR

ACCELERATED MARKET READINESS

APPENDICES



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APPENDIX A: RFP TEMPLATE

Request for Proposals

PROPONENT NAME

~ STATEMENT OF WORK ~

Project Title: ACCELERATED MARKET READINESS PROGRAM (**AMR**)

Proponent: (INSERT PROPONENT NAME; PROPONENT LOCATION; PROPONENT ROLE; PROPONENT RESPONSIBILITIES; PROPONENT COMPOSITION; ETC)

The RFP should give bidders an indication of who they will be working with.

Background: (INSERT BACKGROUND INFORMATION ON THE TOURISM REGION OR AREA THAT THE PROPONENT REPRESENTS INCLUDING THE DESTINATION; CORE ASSETS; DISTINCTIVE FEATURES; ETC.)

The RFP should give bidders an understanding of the tourism region they will be working in and the types of business they will be working with.

Accelerated Market Readiness (**AMR**) strives to grow Atlantic Canada’s tourism industry one operator at a time by offering tourism SMEs individualized, one-on-one expert coaching to implement actionable, achievable, affordable and measurable initiatives to increase business’ yield, season extension and maximize the tourism plant. Designed to work with clusters of “like-minded” tourism operators within predefined geographical areas, **AMR** gives tourism SMEs the opportunity to consult with independent and qualified experts on issues specific to their business and to see if they are truly “market ready”.

Assignment: The (INSERT PROPONENT NAME) will deliver an Accelerated Market Readiness program to (INSERT NUMBER OF BUSINESSES) tourism businesses in the (INSERT TOURISM REGION).

To accomplish this objective, the (INSERT PROPONENT NAME) will contract with a “pre-certified” **AMR** Consultant to deliver the program to identified operators.

Scope of Work: **AMR** allows tourism SMEs to become more responsive to the marketplace, leading to increased earnings and profitability. The Consultant will lead selected tourism SMEs through a practical, hands-on coaching program that examines specific areas of their businesses and business operations.

Based on their interactions with the Consultant, Operators will benefit from the advice and direction provided by an independent expert. The Consultant will establish business benchmarks, and leave the Operator with a concise report and work plan that includes suggested actions that

can be implemented at the Operator level. The Consultant will follow up with coaching sessions at six (6) and twelve (12) months to discuss actions/initiatives undertaken to address urgent actions outlined in market readiness work plan, opportunities and challenges experienced, and identify priority actions going forward.

In fulfilling the **AMR** program requirements, the Consultant will work closely with **(INSERT PROPONENT NAME)**, and will provide the leadership, guidance and overall direction required to satisfy the intended **AMR** outcomes:

1. Immediately following award of contract, the **AMR** Consultant will meet in-person with the **(INSERT PROPONENT NAME)** to review the project and the identified tourism Operators. During this meeting, timelines and milestones will be finalized, as will expected project deliverables. Once a cluster of **(INSERT NUMBER OF OPERATORS)** Operators has been confirmed, the sessions will be scheduled on, ideally, concurrent days over a **(INSERT NUMBER OF OPERATORS)** day period (one day per operation). It is essential the Operators are open for the season during participation.
2. Following the Proponent meeting, the Consultant will confirm with ACOA - Tourism Atlantic that they have the most up-to-date information on the **AMR** program.
3. The Consultant will host a discussion with the Operator, using the discussion guide provided, to get a better understanding of the Operator's needs, challenges, priorities, etc. This is to be conducted at least one week prior to meeting with the Consultant.
4. The Consultant will complete a comprehensive on-site coaching session and discussion with the Operators that includes a comprehensive site visit and assessment, a coaching session, and a brainstorming session during the course of one afternoon.
5. The Consultant will prepare a written report using a pre-determined template. This report will serve as the Operator's guide to enhanced market readiness. It will contain the findings from the comprehensive site visit and assessment, coaching and brainstorming sessions, and will identify areas for improvement and actions to be taken by the Operators to become more market ready.
6. The Consultant will present and discuss the final report and Market Readiness Work Plan with each individual Operator.
7. The Consultant will develop a topline report highlighting overall observations/insights from the **AMR** cluster. The report will identify common opportunities, challenges and issues as well as recommendations for community development initiatives and/or capacity building. The Consultant will organize and lead a meeting with **[INSERT PROPONENT NAME]** and government partners to review the report.
8. The Consultant will initiate virtual discussions with the Operators for follow up at six (6) and twelve (12) months. The Consultant will discuss actions/initiatives undertaken to address urgent actions outlined in the market readiness work plan, opportunities and challenges experienced, and identify priority actions going forward. The Consultant will complete a progress report using the Progress Reporting template provided. Reports will be shared with **[INSERT PROPONENT NAME]** and will be included in the project's final report.
9. The Consultant will participate with **[INSERT PROPONENT NAME]** as needed to assist in the completion of the project's final report.

Deliverables:

The **AMR** Consultant will use a pre-defined template to deliver a final report of acceptable quality to each operator (in Microsoft Word format).

The **AMR** Consultant will use a pre-defined template to supply a topline report highlighting overall observations/insights and identify common opportunities, challenges and issues, as well as recommendations for community development initiatives and/or capacity building.

The **AMR** Consultant will use a pre-defined template to generate follow-up reports for each Operator at six (6) and twelve (12) months.

All reports and supporting documentation will become the sole property of **(INSERT PROPONENT NAME)**.

Submissions:

Proposals submitted by certified **AMR** Consultants must demonstrate:

- A strong understanding of the **AMR** Program, its goals, objectives, processes and the AMR model.
- A strong understanding of the candidate community in terms of its tourism economy, assets, etc.
- Demonstrated experience working with individuals at the Operator level.
- Demonstrated leadership and motivational skills and experience in leading multidisciplinary teams.

Electronic submission in both Word and PDF format are acceptable. Proposals should be submitted to the contracting authority no later than 12:00 noon **(INSERT TIME ZONE)** on ____ (date) _____. The contract for this assignment will be awarded on or about ____ (date) _____.

Budget:

Costing proposals should be presented in two sections. Section one must contain all costs and expenses specific to the provision of professional time (and supplies) required to deliver all components of the **AMR** Program. These expenses must not exceed **(INSERT BUDGET)** inclusive of taxes.

Section 2 of the costing proposal must contain all costs specific to travel (and related expenses) and must provide estimates for air or ground travel, accommodations, meals and all other miscellaneous travel expenses.

Estimates for air travel should be based on current economy class fares. Mileage and meals must not exceed current Government of Canada allowances and per diems.

Contracting Authority: Inquiries for additional information and all submissions should be addressed to: **[INSERT PROPONENT CONTACT PERSON AND INFO]**

	Points
<p>Technical Evaluation:</p> <p>Delivery:</p> <p>a) Understanding of AMR Program, goals, objectives, processes and the AMR model</p> <p>b) Proposed approach and methodology</p> <p>c) Proposed schedule</p> <p>Destination:</p> <p>a) Strong understanding of the candidate community in terms of its tourism economy, assets, etc.</p> <p>b) Demonstrated awareness of broader tourism strategies that may impact candidate community</p> <p>Company:</p> <p>a) Demonstrated experience in working with a board of directors, community groups and committees</p> <p>b) Demonstrated leadership and motivational skills and experience in leading multidisciplinary teams</p>	<p>10 points</p> <p>10 points</p> <p><u>10 points</u></p> <p>30 points</p> <p>15 points</p> <p><u>15 points</u></p> <p>30 points</p> <p>10 points</p> <p><u>10 points</u></p> <p>20 points</p>
<p>Weighting:</p> <p>(a) Delivery: 1.0 x ____ = ____</p> <p>(b) Destination: 1.5 x ____ = ____</p> <p>(c) Company: 1.0 x ____ = ____</p> <p>Technical Score: ____</p>	<p>Max</p> <p>95</p>
<p>Price Evaluation</p> <p>Lowest bid within project budget receives maximum 15 points.</p> <p>Each of the higher bids receives points based on the following formula:</p> <p>Lowest Bid divided by Higher Bid(s) multiplied by 15 equals score.</p> <p>Example:</p> <p>Bid 1: \$5,000 (Lowest bid automatically receives 15 points)</p> <p>Bid 2: \$7,500 (\$5,000 divided by \$7,500 multiplied by 15 = 10 points)</p> <p>Bid 3: \$10,000 (\$5,000 divided by \$10,000 multiplied by 15 = 7.5 points)</p>	<p>Max</p> <p>15</p>
<p>Scoring Summary:</p> <p>Technical Score: ____</p> <p>Pricing Score: ____</p> <p>Total Score: ____</p>	<p>Max</p> <p>110</p>

APPENDIX B: AMR RFP EVALUATION SCORING GRID

Project:	Points	
<p>Technical Evaluation:</p> <p>Delivery:</p> <p>a) Understanding of AMR Program, goals, objectives, processes and the AMR model. 10 points 10 points</p> <p>b) Proposed approach & methodology <u>10 points</u></p> <p>c) Proposed schedule 30 points</p> <p>Destination:</p> <p>a) Strong understanding of the candidate community in terms of its tourism economy, assets, etc. 15 points <u>15 points</u></p> <p>b) Demonstrated awareness of broader tourism strategies that may impact candidate community 30 points</p> <p>Company:</p> <p>a) Demonstrated experience in working with a board of directors, community groups and committees 10 points</p> <p>b) Demonstrated leadership and motivational skills and experience in leading multidisciplinary teams <u>10 points</u> 20 points</p>		
<p>Weighting:</p> <p>(a) Delivery: 1.0 x ____ = ____</p> <p>(b) Destination: 1.5 x ____ = ____</p> <p>(c) Company: 1.0 x ____ = ____</p> <p>Technical Score: _____</p>	<p>Max 95</p>	
<p>Price Evaluation:</p> <p>Lowest bid within project budget receives maximum 15 points Each of the higher bids receives points based on the following formula: Lowest Bid divided by Higher Bid(s) multiplied by 15 equals score</p> <p><i>Example:</i></p> <p>Bid 1: \$5,000 (Lowest bid automatically receives 15 points) Bid 2: \$7,500 (\$5,000 divided by \$7,500 multiplied by 15 = 10 points) Bid 3: \$10,000 (\$5,000 divided by \$10,000 multiplied by 15 = 7.5 points)</p>	<p>Max 15</p>	
<p>Scoring Summary:</p> <p>Technical Score: _____</p> <p>Pricing Score: _____</p> <p>Total Score: _____</p>	<p>Max 110</p>	

APPENDIX C: MEMORANDUM OF UNDERSTANDING PARTICIPATION IN THE AMR PROGRAM

MEMORANDUM OF UNDERSTANDING PARTICIPATION IN THE ACCELERATED MARKET READINESS (AMR) PROGRAM

Operator/ Business/ Organization: _____

Address: _____

Phone Number: _____

HST/Business Number: _____

Contact Name: _____

As a participant in the **AMR** Program, I understand my engagement/time allocation includes:

- Engaging fully with the Coach in pre-coaching business assessment including defining priorities at a time agreed upon with Coach, the site visit, and six (6) and twelve (12) month Coaching Sessions.
- Dedicating at least ten (10) hours for site visit and discussions with the Coach. This includes:
 - At least four hours for initial discussions and site visit with the Coach
 - At least two hours for review of report and next steps following site visit
 - At least four hours to prepare and participate in the 6 and 12 month Coaching sessions
- Complete Operator Satisfaction Surveys within 2 weeks of site visit and again following the 12 month Coaching Session
- Track actions taken in relation to coaching and adjustments made for progress reports
- Offer testimonial in support of **AMR** if appropriate

I agree to a contribution of \$_____ toward the overall \$3,520 cost of the **AMR** coaching effort.

Operator signature: _____

Proponent signature: _____

APPENDIX D: GETTING TO KNOW THE OPERATOR – DISCUSSION GUIDE

GETTING TO KNOW THE OPERATOR - DISCUSSION GUIDE

(to be used as a guide during initial phone discussion)

CONTACT INFORMATION:

First name: _____ Last Name: _____

Business Name: _____

Address: _____

Municipality: _____ Province: _____ Postal Code: _____

Telephone: _____

Email: _____

Website: _____

Social Media Sites: _____

Trip Advisor Listing: _____

Google Listing _____

ABOUT YOUR OPERATION:

- 1. How long has the business been operating?** *(Place X beside appropriate box)*
 Less than a year 1-3 years 4-7 years ≥ 8 years
- 2. If you are the business owner, how long have you owned the business?** *(Place X beside appropriate box)*
 Less than a year 1-3 years 4-7 years ≥ 8 years

3. Please provide a general description

Core Business: _____

Additional Business Activities: _____

4. What was your total revenue received from all sources for your most recent complete financial year?
\$ _____

5. Please enter the percentage of your business revenues generated by the following activities:

Accommodations	_____ %	Admissions	_____ %	
Food and beverage	_____ %	Tour fees	_____ %	
Retail sales	_____ %	Other	_____ %	Type _____

6. What markets do you serve?

a. _____
b. _____
c. _____

7. How many staff do you employ?

Seasonal full-time	_____	Seasonal part-time	_____
Permanent full-time	_____	Permanent part-time	_____

PRIORITY AREAS:

Below, please rank the top business priorities that you would like to focus on in your Coaching Session (with 1 being the most important priority).

_____ Increase sales
_____ Increase profitability
_____ Increase productivity (business procedures, etc.)
_____ Improve staff management
_____ Improve staff recruitment and retention
_____ Make existing products/services/experiences more competitive
_____ Develop new products/services/experiences
_____ Improve financial management
_____ Improve product/service costing
_____ Strategic planning
_____ Marketing planning
_____ Improve management process
_____ Improve performance management
_____ Improve quality systems and controls
_____ Other #1 (specify) _____
_____ Other #2 (specify) _____

Please provide some additional information about your top three priorities (Why are they priorities? What, if any, specific coaching help would you like with each one? What, if any, goals or objectives do you hope to achieve by addressing these priorities?)

PRIORITY 1: _____

Specific help: _____

Objectives to be achieved: _____

PRIORITY 2: _____

Specific help: _____

Objectives to be achieved: _____

PRIORITY 3: _____

Specific help: _____

Objectives to be achieved: _____

APPENDIX E: AMR COACHING REPORT

AMR COACHING REPORT

Business Name: _____

Address: _____

Contact: _____

Coach: _____

Date: _____

AREAS OF FOCUS:

1. Operator Identified Issues

2. Overall State of the Business

Date of Business Plan: _____

Operating Dates: _____

Key Management (person/title): _____

Staff Levels (# FT/seasonal): _____

Key Markets: _____

Engagement with Industry
Groups: _____

3. Considerations for a Successful Tourism Product

	Yes	No	Needs Improvement	Notes
Does the business have a clear brand and selling proposition? Consider tone, values, character, logo, etc.				
Does the business have a target market with clearly defined attributes and characteristics?				
Does the delivery of the experience or product align to the expectations of the target market?				
Do marketing activities and sales channels align to the target market?				
Is access to the product or experience designed around the target market? Consider hours of operation, age groups, group sizes, personal safety, use of digitalization, etc.				
How does the product or experience adapt to feedback? Consider reviews, website analytics, popular offerings.				
Does the tourism product or experience promote a sense of authenticity through local connection, storytelling or engaging personnel?				
Are there indications that the product or experience is memorable or unique?				
Does the tourism product or experience align to regional, provincial and/or federal tourism priorities?				

4. Overall Physical Site Impressions

Overall curb appeal:

Interior:

Comfort and amenities:

Accessibility:

5. Customer Service

Welcome Area:

Customers service training:

Customers service

evaluation:

Staff benefits (engagement,

monetary, etc.):

Use of technology to

improve customer

experiences:

6. Packaging and Sales

Packaging:

Partnerships:

Sales Channels:

Sales activity:

Volume:

Revenues:

Profitability:

Other:

7. \Marketing Materials

Overall Website Quality and
Mobile Friendliness:

Website transactional
capability (online sales, etc.):

Use of Website Analytics:

Use of social media and
other platforms:

Social media engagement:

Quality of social content
(photos, videos, user
generated content, voice):

Google Listing:

Trip Advisor:

Advertising Campaigns:

Directional Signage:

On Site Signage:

Additional Online Listings
(provincial, regional, etc.)

8. Other Emerging Issues

APPENDIX F: MARKET READINESS WORK PLAN

MARKET READINESS WORK PLAN

The following table is intended to act as a visual guide for tracking improvement to your business and can be used during the follow-up sessions. “Urgent Actions” may be tangible or intangible. For example: “make the business wheelchair friendly” or “improve customer satisfaction”. This document will be updated at both the 6 month and 12 month Coaching Sessions.

Urgent Actions to be completed by the Coach	Budget to be completed by the Operator	Responsibility to be completed by the Operator	Timeline to be completed by the Coach	Measure to be completed by the Operator	Status to be completed by the Operator
					<u>Update #1:</u> <u>Update #2:</u>
					<u>Update #1:</u> <u>Update #2:</u>
					<u>Update #1:</u> <u>Update #2:</u>
					<u>Update #1:</u> <u>Update #2:</u>
					<u>Update #1:</u> <u>Update #2:</u>

Possible Solutions

Potential Resources for Assistance:

Contact Person

Contact Information

Community Business Development Corporation (CBDC)

Province

Atlantic Canada Opportunities Agency

Business Development Bank of Canada

APPENDIX G: AMR 6 MONTH PROGRESS REPORT

ACCELERATED MARKET READINESS (AMR) 6 MONTH PROGRESS REPORT

This Progress Report helps keep a business on track and puts into action the priority activities identified and agreed upon with the Coach during **AMR** coaching. It aims to help monitor the progress of the Market Readiness Work Plan and to adjust resources as required. The updated Work Plan is to be included in the progress report.

Name of Business: _____

Business Contact: _____

Coach: _____

Date of Progress Reporting at six (6) months: _____

Date for 12 month Coaching Session: _____

- 1. Outline activities/ initiatives taken to address URGENT ACTIONS outlined in the Market Readiness Work Plan at six (6) months.**

- 2. Opportunities and challenges faced within the past six (6) months.**

- 3. Additional actions/activities suggested as result of reporting at six (6) months.**

- 4. Priority actions for the next six (6) months.**

APPENDIX H: AMR 12 MONTH PROGRESS REPORT

ACCELERATED MARKET READINESS (AMR) 12 MONTH PROGRESS REPORT

This Progress Report helps keep a business on track and puts into action the priority activities identified and agreed upon with the Coach during **AMR** coaching. It aims to help monitor the progress of the Market Readiness Work Plan and to adjust resources as required. The updated Work Plan is to be included in the progress report.

Name of Business: _____

Business Contact: _____

Coach: _____

Date of Progress Reporting at 12 months: _____

1. Outline activities/ initiatives taken to address URGENT ACTIONS outlined in the Market Readiness Work Plan since the six (6) month Progress Report.

2. Opportunities and challenges faced within the past six (6) months.

3. Go-forward priority actions as result of reporting at 12 months.