



# *Branding, Development & Marketing Action Plan*

May, 2016



## PREFACE

This Branding, Development and Marketing Action Plan was developed through a collaborative process between Roger Brooks International, Inc. (RBI) and the residents and stakeholders of Okotoks, Alberta. We would like to thank the Okotoks volunteers who devoted many hours to the process of making this plan a reality by participating on the Brand Development Committee, as well as the many business and property owners, residents, and others who contributed their time and valuable input of ideas, resources, and feedback.

The recommendations made in this Plan are based on the information provided to the Roger Brooks International team by many caring and concerned citizens, research, best practices in other locations, and the findings of previous plans and studies, as well as our experience and expertise in the field.

The results from implementation of this Branding Plan are dependent upon many factors, including the time, effort, funding availability, and cooperation of those involved in its implementation.



## TABLE OF CONTENTS:

Introduction .....	6
The primary goals of this effort .....	7
The ten things you need to know about branding .....	8
The branding process .....	9
The Okotoks, Alberta vision .....	14
The look and feel of the brand .....	19
Marketing materials .....	19

## Okotoks Recommendations

### FOR THE YEAR 2016

1. Form the Brand Leadership Team (BLT) - Spring, 2016 .....	22
2. Brand Leadership Team assignments - Spring, 2016 .....	25
3. Secure marketing domain names – Spring 2016 .....	27
4. Contract with someone to begin implementation of this plan – Spring 2016 .....	27
5. Review the plan every month and update it every year - Spring, 2016, ongoing .....	28
6. Register (trademark) your brand identities and tag lines – Spring 2016 .....	28
7. Create a structure for the Brand Action Plan development effort - Spring, 2016 .....	28
8. Contract for graphic design marketing, and messaging services – Spring 2016 .....	30
9. Contract for the creation of a Brand Style Guide – Spring 2016 .....	32
10. Find “Start Up” funding for initial downtown development efforts - Spring, 2016 .....	34
11. Create a Downtown Development Master Plan for a plaza, eventual market/pavilion, shared parking and pedestrian-focused redevelopment - Summer, 2016 .....	35
12. Begin the process of raising the public and private funds needed to complete all the Action Plan tasks - Summer, 2016 .....	36
13. Consider a downtown Business Revitalization Zone (BRZ) to fund operational recommendations downtown - Summer, 2016 ..	38
14. Begin the transition to the new brand identity (logo and tagline) - Summer, 2016 .....	39
15. Adopt a new name for downtown Okotoks - Fall, 2016 .....	40
16. Implement a curb appeal program on Elizabeth Street - Fall, 2016, ongoing .....	40
17. Add branding to your monthly e-newsletter - Fall, 2016, ongoing .....	43
18. Add Okotoks businesses to GPS services, web-based applications; make corrections - Fall, 2016, ongoing .....	44
19. Design, print and distribute “The Very Best of Okotoks” rack brochure - Fall, 2016 .....	44
20. Design, print, frame and distribute brand awareness posters - Fall, 2016 .....	47
21. Contract for a Design, Programming & Business Plan for the plaza and pavilion – Fall 2016 .....	49

### FOR THE YEAR 2017

22. Redevelop and expand the vehicular wayfinding system and add pedestrian wayfinding downtown - Spring, 2017 .....	51
23. Enter into a public relations / marketing contract for national coverage – Winter (January), 2017 .....	53
24. Work with CTV and other television networks to include Okotoks on weather maps – Winter (January) 2017 .....	54
25. Update the Branding, Development & Marketing Action Plan – Winter (January-February), 2017 .....	54
26. Develop an annually updated “Community Profile” and distribute it – Winter (January-February) 2017 .....	55
27. Develop a business and investment “Opportunities” brochure and distribute it – Winter (January-February) 2017 .....	56
28. Get your best spokesperson on film – Spring, 2017 .....	57
29. Purchase two mobile visitor information centres - Spring, 2017 .....	57
30. Contract for downtown business recruitment – Spring 2017, ongoing .....	58
31. Work with property owners on creating a “new technologies in the home” marketplace – Summer 2017 .....	60
32. Rename, Rebuild and redesign the Olde Towne Okotoks website (experiences and business opportunities) - Summer, 2017 .....	61

33. Create a zoning overlay for the redeveloping area of downtown Okotoks - Summer, 2017 .....	63
34. Pass a bylaw limiting the number of chain stores in the downtown - Summer, 2017 .....	66
35. Set adequate but reasonable liability insurance requirements for events operators - Summer, 2017.....	67
36. Work with property owners on lease agreements - open days and hours with an evening focus - Summer, 2017, ongoing .....	68
37. Work with the school system on integrating STEM and other technologies, green living curriculum – Fall 2017 .....	69
38. Bring Roger Brooks back for a review workshop - Fall, 2017.....	69

## FOR THE YEAR 2018

39. Purchase or subscribe to CRM software - Spring, 2018.....	70
40. Create a database of clubs and organizations - Spring, 2018.....	70
41. Create a database of press contacts and large non-profits - Spring, 2018.....	72
42. Create a “Guide to Event Production in Okotoks” brochure - Spring, 2018 .....	73
43. Create new and updated social media campaigns - Spring, 2018 .....	74
44. Improve access to public washrooms on Elizabeth Street and at the plaza/pavilion - Spring, 2018 .....	74
45. Begin development of the plaza - Summer, 2018.....	75
46. Begin staffing for the plaza - Summer, 2018 .....	75
47. Develop free, robust Wi-Fi access at the plaza and within a 300 metre radius of downtown - Summer, 2018.....	77
48. Add street trees where they don't exist downtown - Summer, 2018.....	78
49. Allow, encourage, and budget for street artisans, musicians and buskers - Summer, 2018.....	79
50. Implement a “shared worker” program downtown - Summer, 2018.....	80
51. Implement a hospitality-training program - Summer, 2018 and ongoing.....	81
52. Install decorative street crossings - Summer, 2018.....	81
53. Update downtown pole banners - Summer, 2018 .....	82
54. Begin funding, design and development of shared parking structures downtown – Fall 2018.....	85

## FOR THE YEAR 2019

55. Contract for the manufacturing and sale of branded logo gear- Spring, 2019 .....	86
56. Apply the brand graphics to town vehicles - Spring, 2019 .....	88
57. Build an indoor/outdoor market pavilion - Summer, 2019 .....	89
58. Create a YouTube channel and load it up - Summer, 2019, ongoing.....	91
59. Develop a detailed Marketing, Advertising & Publicity plan and budget. Tell the world. - Summer, 2019, and ongoing .....	91
60. Contract for professional video and still photography – Summer, 2019 .....	92

## SUPPORTING DOCUMENTS

Sample Street Performer Guidelines.....	96
Additional BrandGraphics.....	98
Seven Question Itinerary Exercise .....	112
Roger’s Video Library Viewing Order.....	113

## RECOMMENDATIONS CHECKLIST

### FOR THE YEAR 2016

- ☐ 1. Form the Brand Leadership Team (BLT)
- ☐ 2. Brand Leadership Team assignments
- ☐ 3. Secure marketing domain names
- ☐ 4. Contract with someone to begin implementation of this plan
- ☐ 5. Review the plan every month and update it every year
- ☐ 6. Register (trademark) your brand identities and tag lines
- ☐ 7. Create a structure for the Brand Action Plan development effort
- ☐ 8. Contract for graphic design marketing, and messaging services
- ☐ 9. Contract for the creation of a Brand Style Guide
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- ☐ 11. Create a Downtown Development Master Plan for a plaza, eventual market/pavilion, shared parking and pedestrian-focused redevelopment
- ☐ 12. Begin the process of raising the public and private funds needed to complete all the Action Plan tasks
- ☐ 13. Consider a downtown Business Revitalization Zone (BRZ) to fund operational recommendations in the downtown
- ☐ 14. Begin the transition to the new brand identity (logo and tagline)
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- ☐ 19. Design, print and distribute "The Very Best of Okotoks" rack brochure
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- ☐ 25. Update the Branding, Development & Marketing Action Plan
- ☐ 26. Develop an annually updated "Community Profile" and distribute it
- ☐ 27. Develop a business and investment "Opportunities" brochure and distribute it
- ☐ 28. Get your best spokesperson on film
- ☐ 29. Purchase two mobile visitor information centres
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- ☐ 31. Work with property owners on creating a "new technologies in the home" marketplace
- ☐ 32. Rename, Rebuild and redesign the Olde Towne Okotoks website (experiences and business opportunities) - Summer, 2017
- ☐ 33. Create a zoning overlay for the redeveloping area of downtown Okotoks
- ☐ 34. Pass a bylaw limiting the number of chain stores in the downtown
- ☐ 35. Set adequate but reasonable liability insurance requirements for events operators
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- ☐ 38. Bring Roger Brooks back for a review workshop

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- ☐ 50. Implement a "shared worker" program downtown
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- ☐ 52. Install decorative street crossings
- ☐ 53. Update downtown pole banners
- ☐ 54. Begin funding, design and development of shared parking structures downtown

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- ☐ 59. Develop a detailed Marketing, Advertising & Publicity plan and budget. Tell the world.
- ☐ 60. Contract for professional video and still photography

## INTRODUCTION

Having an Action Plan puts Okotoks at a clear advantage over the hundreds of other cities and towns in Alberta that don't have much, if any, idea where they are going or what they want to be known for. Clarity and consensus of purpose frees up citizens and local stakeholders from analysis, allowing them to move forward, take action, and achieve dozens of small successes that will revitalize the community and make it a Canada showcase.

The days of being "all things to all people" are over. To be successful – in business or as a community – you must differentiate yourself from everyone else. After all, there are 366 cities, towns and other communities in Alberta and every single one is instantly accessible via the web. To win, you must find that one "unique selling proposition" that really sets you apart from everyone else and then build on that as a foundation. This is the art of branding.

In this new reality of shrinking funding for communities, each town must think and act like a business: find new ways to import more cash than is exported when locally earned money is spent elsewhere. Communities have been forced to create a unique identity to be successful. Find your niche, create new business opportunities within that niche, and then promote it like crazy.

Okotoks is faced with several challenges:

1. Population growth management, including school overcrowding, roads and water supply.
2. Traffic and traffic flow management
3. Downtown (Elizabeth Street) lack of good retail and restaurant mix, and need for pedestrian friendly amenities
4. Downtown connections to the rest of the town
5. Tax revenue pressures
6. Some vandalism

On the positive side, Okotoks has some great assets it can build on:

1. Okotoks proximity and convenience to Calgary and to mountain recreation
2. The small town atmosphere but some big city amenities like performing arts, museums and events
3. The river and green space running through town
4. The downtown (and its potential)
5. Good public and private schools
6. 79 kms of pathways, 96 parks, 48 playgrounds, 14 ball diamonds, 15 soccer pitches, and more

The scales definitely tip to the positive side for Okotoks. Beautiful Rocky Mountain views, bucolic rolling hills, and the pastoral Sheep River Valley surround the residential community. Its proximity to Calgary just to the north makes Okotoks an attractive, desirable community with many amenities, well-planned neighbourhoods, open spaces and facilities. Growth has been robust and steady. The Real Estate Investment Network named Okotoks as one of Alberta's Top Ten Investment Towns in 2012 and 2013.

The Town of Okotoks puts great effort into building an environmentally conscious community through its green space, outdoor recreation facilities and world-leading solutions to environmental challenges. One of the goals of this branding effort is to support and highlight these efforts, particularly in Okotoks' downtown.

Correct or not, people judge a town by its downtown – the traditional heart and soul of a community.

Over a five-month period, the Okotoks Brand Development Committee (BDC) spearheaded the area's branding efforts. This culminated in a weeklong "Brand Camp" during the week of January 11, 2016, when the Brand Development Committee solidified the direction, key marketing messages, and supporting product that will make Okotoks a more desirable place to live, raise a family and start a business. The citizen participation in this project came from a wide variety of businesses and non-profits, demonstrating the interest and commitment of the community at large for a branding initiative.

## THE PRIMARY GOALS OF THIS EFFORT

The Brand Development Committee set forth the following goals for the Okotoks branding effort:

1. To make downtown the showcase for the future of downtowns across Canada.
2. To create a signature central gathering place for the people of Okotoks and their visitors.
3. To increase the job base IN Okotoks: Reducing commutes to Calgary and other places.
4. To become THE centre in Western Canada for sustainable living, innovation and creativity.
5. To continue the tradition of connecting people to: each other (neighbourhoods), the environment, green energy, and healthy living.

These goals are about a downtown that is pedestrian-friendly, culturally rich, activity-driven, and a showcase for innovative technologies.

Branding is a means to an end – to accomplish the goals listed above. These are core to the entire effort and will shape the future of Okotoks for generations, making it THE destination of choice for investment, opening or expanding a business, for raising a family, and as one of the Canada's best visitor destinations.

## THE TEN THINGS YOU NEED TO KNOW ABOUT BRANDING

### 1. DIFFERENTIATION – Finding your Unique Selling Proposition

Branding is the art of setting yourself apart from everyone else. What sets Okotoks apart from High River? Turner Valley? Black Diamond? The other 366 communities in Alberta? Being a place that has “something for everyone” can be found anywhere and says nothing about who you are or even who you aspire to become.

### 2. IT’S A PERCEPTION – A FEELING

A brand is a perception – that is, what people think of Okotoks when they hear the name mentioned. It’s also a promise that the town will deliver on the perception. In Okotoks’ case we know that part of this effort is “positioning” or “branding” the community, bringing quality of life to the forefront with a focus on an amazing downtown, and the creation of public assembly spaces and family friendly activities.

### 3. LOGOS AND SLOGANS ARE NOT BRANDS

Logos and slogans are not brands. They are just marketing messages and graphic images used to support and reinforce your ownership position. After all, brands are about owning your niche in the marketplace.

### 4. YOU NEVER USE FOCUS GROUPS

You never use focus groups for brand development unless you want a watered down generic brand that can fit just about anyone, anywhere. Okotoks’ Brand Development Committee and subsequent Brand Leadership Team are not focus groups, but a group of local businesses and organizations whose primary purpose is to develop this plan to reinforce and support the perception and the promise being developed and marketed.

### 5. A BRAND EVOKES EMOTION

A great brand evokes emotion in a positive way. It’s a feeling someone has about you. This is why you must focus on activities more than physical attributes such as historic buildings, parks, and other public facilities.

### 6. SUCCESSFUL BRANDS ARE BUILT ON PRODUCT

All successful brands are built on product, not marketing. You can develop new advertising, graphics, websites, mobile apps, signs, and posters, but if the product doesn’t change or improve, what have you accomplished? Any increase in sales will not be sustainable.

### 7. YOU NEVER “ROLL OUT” A BRAND

It’s earned – good or bad. Building the product and activities that will draw residents and visitors to downtown Okotoks will take time and patience. It’s important to not oversell what you have to offer, at any stage of the branding process.

### 8. TOP-DOWN BRANDING DOESN’T WORK

You cannot do branding by public consent. Yes, we did ask local area residents to weigh in on the brand direction, but in the end, the idea found to be most feasible is the brand direction developed and detailed in this plan. This has been a grassroots effort with lots of local input.

### 9. BRANDS MUST BE FEASIBLE

You build the brand on feasibility, not just local sentiment. Typically, the most feasible brand direction is built on a foundation already there. In the case of Okotoks, that foundation is the green technology innovations that it is known for.

### 10. PUBLIC RELATIONS

Brands are built on public relations – advertising is used to maintain your ownership position. A brand is a feeling we have of you – and feelings are communicated by word of mouth, press coverage, articles and, these days, social media.



## THE BRANDING PROCESS

The process used to develop the Okotoks, Alberta brand has been tested over a number of years and has, to date, met with a 100% success rate. The process is as follows:

### 1. Creation of the Brand Development Team (BDT)

Okotoks stakeholders were selected from a wide array of organizations and businesses to become the Brand Development Committee for this branding project. An outside facilitator Roger Brooks International (RBI) was brought in to guide the community through the process. Included on the BDC were the following people:

Derrick Birkman – Local business, Converge Studios Graphic Design

Carol Bishop – Local business, Boot Hill Gallery Western Boutique

Dale Fea – Arts Council

Carrie Fischer – Councillor, Town of Okotoks

Natalie Jamieson – Retail shop: Mint & Maple, Olde Towne Representative

Ana McFadyen – Okotoks Network, Realtor, Teacher

Lynn Neufeld – Olde Towne Neighbourhood Connector

Trellis Palmer – Local citizen, Okotoks Meet & Mingle

Alexandra Ross – Economic Development, Town of Okotoks

Mark Rowed – Globalstar, Okotoks Network

Jody Sanderson – Chamber of Commerce

Nancy Weigel, Director, Town of Okotoks

Roger Brooks International was retained to facilitate the process, led by Roger Brooks, Jordan Pogue, John Kelsh and Creative Director, Greg Forsell. Competitive analysis, research and feasibility work was a team effort between the Okotoks Brand Development Committee and the Roger Brooks team.

### 2. Education and outreach

In August of 2014, Roger Brooks conducted an Opportunity Assessment of Okotoks, and the findings were presented in a two-hour workshop. The assessment provided an unbiased overview of Okotoks – “how it is seen by a visitor.” It included a review of local marketing efforts, signage, attractions, critical mass, retail mix, ease of getting around, customer service, visitor amenities such as parking and public washrooms, overall appeal, and the community’s ability to attract visitors. The Assessment Report that followed contained suggestions of things the community could do to improve the consumer experience. Many of these suggestions are already being implemented by the Town, and some are included in this Branding, Product Development and Marketing Action Plan as more comprehensive Recommendations, with the added benefit of in-depth research, evaluation and local input. They now contain estimated costs, possible funding resources, recommended scheduling, leadership, and expanded rationale and implementation details.

In September 2015, RBI returned to Okotoks to kick off the next step – a community branding program, to build a brand from the ground up. Roger conducted a workshop “The Art of Branding” and introduced an online questionnaire soliciting thoughts and opinions from residents in and outside of Okotoks. Using the questionnaire, over a month-long period nearly 900 people weighed in on nine questions including what they thought Okotoks should be known for – its brand. They also provided feedback on what they saw as major challenges and best assets. They answered other questions including what they thought was missing from the Okotoks mix that would get them to spend more time (and money) in the community. The responses were enlightening, and very helpful to RBI. The different origins of respondents allowed us to see the perspective

of locals, and those living in nearby communities. Eighty six percent of respondents lived within Okotoks. Eleven percent were between the ages of 21 and 30, while 46% were between the ages of 31 and 45. Seventy-five percent were women.

The research poll result files were reviewed by the RBI Team and the Brand Development Committee. Some of the top comments were as follows:

1. Why we live here:
  - Small town atmosphere
  - Proximity to Calgary
  - Family (close by or a great place to raise a family)
  - Good schools
2. Places we hang out:
  - Calgary
  - Local restaurants, shops and pubs
  - Along the river
3. Places we take friends and family:
  - The Big Rock
  - Downtown restaurants and shops
  - Saskatoon Farm
  - The river valley
  - Out of town destinations
4. What needs to be done:
  - Focus on downtown
  - More festivals
  - More attractions
  - A movie theatre

Also in September 2015, more than 40 individuals were interviewed during six group interview sessions held in Okotoks. Representing many local organizations and points of view, they had an opportunity to weigh in on Okotoks' future and share detailed information and opinions.

### **3. Identification of the markets**

It's important to know whom Okotoks hopes to attract as a result of the branding process in terms of location, demographics and lifestyle. Working with the Brand Development Committee and using socio-economic research, the markets were identified as follows:

Geographic:

- The 37,000 residents of the Okotoks area (5-kms radius)
- The additional 7,000 residents within your immediate service area
- Neighbouring towns: High River, Black Diamond, Turner Valley
- The greater Calgary area and visitors coming into Southern Alberta
- Visitors from throughout the US and Canada to learn from you

Demographic:

- Millennial & Generation X (and their families)
- Technology, green sciences oriented
- Creative and ultra-innovative people

Community | Lifestyle:

- Love the connection to recreation, sports, active living, art and environment
- Sustainable living (recycling, using new technologies, pied piper)
- Innovative thinkers and “doers”

#### **4. Narrowing the brand concept alternatives through research and outreach**

The Brand Development Committee spent several days reading through the local poll responses and applying it to the “Feasibility Testing” process. Here are the ten questions we asked for each idea that came from local and area residents:

1. Is this something the markets we are hoping to attract can’t get or do closer to home?
2. Is this something the community can buy into? We’re not asking for permission but want something they can take ownership of – “We’re okay with it.”
3. How much will it cost and when will we see a return on our investment? This applies to both public and private investment.
4. Can the private sector buy into it? Are there investment opportunities? After all, this is about tax base.
5. Does it have legs? Can we start with a small niche and add “extensions” to the brand? If we want to be a sports capital, can we start by being the soccer capital, then add softball, then disc golf...?
6. Can we make it obvious and pervasive throughout the community?
7. Do we have those who will tirelessly champion the cause?
8. How wide an audience will it attract? We want a niche, but not one that’s so small the economic gain is minimal.
9. Will it extend our seasons? This is why hanging a brand on a three-day festival is rarely feasible. What about the other 362 days of the year?
10. Is it experiential? Based on activities? BMW’s tag line is “The Ultimate Driving Machine.” It’s based on the experience – not the physical attributes of the car.

The Brand Development Committee was able to narrow down the ideas to a few leading brand direction candidates:

1. Sports & recreation – Seaman Stadium, Rec Centre, trail system, the river, pathways, field house
2. Science & technology – Drake Landing, LEED certified muni-buildings, water treatment
3. Farm fresh – Saskatoon Farm, Chinook Honey Farm, Kayben Farms
4. Art scene (culture) – Arts council, galleries, performing arts, museum, music

The BDC also wanted to portray certain feelings: Clean, green, active, small town, beautiful, friendly, creative, safe, peaceful, young, eclectic.

During “Brand Camp” these concepts were considered in relationship to a focus on the downtown heart of Okotoks and its development as a dynamic and programmed “third place” that would attract residents, visitors and potential residents alike.

The brand focus chosen is on innovation, technology, education, environmental art, and health & wellness.

The short hand way of expressing this focus is “At the intersection of innovation and creativity”.

## **5. Creation of the Brand Leadership Team**

Now that the Brand direction is determined, the BDC is in the process of creating the Brand Leadership Team, which is described in the first Action Plan recommendation. The Brand Leadership Team’s primary job is to energize the community into implementing this Branding, Product Development and Marketing Action Plan. These will be the enthusiastic champions who will make it all happen. They will never take no for an answer and will move mountains to make a difference for Okotoks.

## **6. Development of Product That Supports the Brand**

This plan’s recommendations include a list of product development initiatives to give the brand a solid foundation: what needs to be developed, improved, added to, or changed to reinforce the brand direction. Brands are built on product, not just marketing. In fact, product sells itself. The recommendations in this plan are branding, product development and marketing initiatives. All are an INVESTMENT, not just an expense. Every recommendation was included ONLY if it would help achieve the goals of reducing expenditure leakage (locally earned money spent elsewhere), increasing area resident spending, and making Okotoks a vibrant place to start a business, raise a family, and become a year-round destination for local family, friends and visitors.

## **7. Write the brand promise**

Once we knew what the brand would be, and defined the product that will reinforce and support it – leading to ownership of the brand – the brand promise was created. This is the guiding principle for everything the community and its partnering organizations will focus on for the next three to five years.

## **8. Create the look and feel of the brand**

This is where the logo, tag lines, concept print ads, pole banners, posters, and other graphic elements come into play. They must portray the feeling that supports the brand promise. Successful brands evoke emotion – they are what we think of Okotoks when you mention where you are from.

## **9. Develop the Action Plan**

During the second week of January 2016, the Brand Development Committee donated many hours of their time to meet as a group to come up with the major initiatives that will drive the brand forward. The time spent helped to create a brand that will last for generations. The recommendations outlined in this plan came as a result of meetings during the week in January along with follow-up research.

This is NOT a Strategic Plan outlining general goals, strategies and objectives. It is in essence, a “to do list” that details specific assignments, by organization, approximate costs where and when available, and they are placed in chronological order of when they would be implemented. It’s important to point out that an Action Plan is like a jigsaw puzzle – there are many pieces and you cannot reshape them, toss some aside or alter them without ending up with a worthless puzzle or plan. Branding, product development and marketing recommendations are all placed in logical sequence and schedule in this plan, making it easy to simply work your way, over time, down the list.

## **10. Make something happen**

As you read through the recommendations you’ll see that this is an aggressive plan. It requires digging deep to make some very specific things happen over the next two to three years. The work has already begun but won’t end for perhaps a decade.



In fact, you can never rest on your laurels, so the brand (including this plan) must always progress and grow. Once you cement ownership of your brand, other communities will try to emulate your success – they will be gunning for you.

After the town and its partners have implemented most, if not all, of the recommendations in this plan, they will come back together and develop the next list – always with the same goals and the same brand promise as a guiding light. Product development is an ongoing process – not a one-time thing.

### **11. Keep the energy high**

This is why true champions must lead the effort. Their unbounded enthusiasm will push the agenda forward. There are ONLY three killers of any branding effort:

1. Local politics, which are typically worse with membership organizations than with elected officials.
2. Lack of champions who push the agenda forward.
3. Lack of money (both private and public).

The bottom line: If you have true champions, they will ALWAYS get through the politics and they will find the money. ALWAYS.

### **12. Tell the world**

2016 and 2017 are the “getting ready years,” which includes securing funding for several projects, working as the Brand Leadership Team to help the Okotoks organizations implement the plan, and gradually reworking all marketing materials from business cards to websites, etc.

One word of caution: As you start to implement the new brand graphics and key marketing messages, make sure you will be able to “deliver on the promise” they represent. A brand is a promise, and if you don’t live up to that promise the branding effort will fall flat. In the case of Okotoks, Alberta, to become a truly vibrant and active downtown destination where there is “always something going on,” it will be mandatory to live that mantra – meaning the recommended plaza and pavilion should be full of life and activity at least 250 days a year. And that still leaves 115 days of inactivity.

### **13. Revisit the plan every month**

This Action Plan is a “to do list”. Not a plan you read once and then set on a shelf. Start working down the list. Write notes in the margins; check off items that have been accomplished; put peer pressure on your partnering organizations: “How are you doing with your list?”

Once a year go through the plan and update it. Plans like this are fluid, and some things may need to be rearranged or may alter the timeline, so it’s very important to update the plan once a year. Likewise, as you implement items in the plan, each year you’ll add several new initiatives to the plan to keep the brand moving forward and to keep it growing.

### **14. Never, ever give up**

Stay determined in creating the Okotoks brand and you will succeed. As Calvin Coolidge stated: “Nothing in this world can take the place of persistence. Talent will not: nothing is more common than unsuccessful men with talent. Genius will not; unrewarded genius is almost a proverb. Education will not: the world is full of educated derelicts. Persistence and determination alone are omnipotent.”

Persistence sets the stage for never taking no for an answer. Where there’s a will, there’s a way. It will be impossible to make everyone happy, so just keep pushing forward.

Dr. Robert Anthony once said, “Forget all the reasons why something may not work. You only need to find one reason why it will.”

Let the fun begin!

## THE OKOTOKS, ALBERTA VISION

This plan may be one of the most important initiatives ever undertaken by the people of Okotoks. It provides their community with a decisive and unique identity of place, and supports that identity with improvements in the heart and soul of the community – the downtown.

In small towns and large cities, residents and their visitors want great downtowns more than ever before. Called “Third Places”, these are the lively places we go after work and on weekends. And this movement is what will keep the young people in the community, and will attract the millennial generation.

Unlike many other smaller communities, Okotoks faces growing pains. Rapid growth often happens irregularly. That is, growth occurs in one or two sectors of the economy, and not in others. This imbalance places pressures on the underdeveloped sectors. In Okotoks case, housing development and schools have grown rapidly, while the downtown retail and dining environment has been slower to maintain pace with the demand for a larger capacity, pedestrian friendly location to meet friends and hang out.

This plan acknowledges the rapid growth of Okotoks, and presents initiatives that narrows and brings into focus the desired identity for the entire community while at the same time focuses on improving the capacity of the downtown to match demand from current and future residents as well as weekend visitors.

The Brand Development Committee went through a 13-step process that included public outreach, determining who it is Okotoks wants to attract, what it wants to be known for, the product that backs up the claim, what the marketing looks and feels like, and a detailed Action Plan that will get the community to accomplish all of its major goals.

It all starts with the citizens of Okotoks. This plan is for you and you alone. After all, if you won’t hang out in Okotoks, neither will visitors. The product development outlined in this Action Plan includes:

- A signature programmed plaza with 250+ days of activity
- A year round public market with indoor space to accommodate activities and events
- Other downtown gathering places
- Re-organizing some of the business mix and creative office space
- Making downtown more pedestrian-friendly
- Creating additional parking spaces to be shared among businesses
- Creating a Business Revitalization Zone
- A community-wide wayfinding system
- Pedestrian wayfinding in the downtown
- Programming of events and activities at Olde Towne Plaza
- Interactive art, brand-specific amenities, design centre

The heart and soul of every community, besides its people, is its downtown. If locals won’t “hang out” in your downtown, neither will visitors. It’s where you will want to go after work and on weekends. Remember the 7-8-7 Rule:

- 70% of first time sales can come from curb appeal;
- 80% of all spending is by women, and
- 70% of retail spending takes place after 6:00 p.m.

Once these rules are implemented, Okotoks will become THE destination of choice for those living in neighbouring cities and towns. (Wouldn't it be nice if more Calgary area residents came to Okotoks rather than you going there?).

Implementation of this Action Plan will get people that live in Okotoks to actually spend more of their money in Okotoks, not because they feel they have to, but because they want to. Secondly, when people look to relocate to the general area, the goal is to make sure these folks also look at Okotoks as a viable and desirable option.

And finally, this branding and product development effort is geared to people looking for a creative business environment, an activity-driven downtown with cultural depth. This plan is geared to attracting young families and entrepreneurial spirits with an interest in innovation, technology, the environment, and wellness.

## BRAND PROMISE

What is the brand promise of Okotoks?

***"Energized by the environment and innovation through creative, active and connected living"***

This is a big promise and key to its success will be the offerings, activities and businesses that back it up.

Essential to delivering on this brand promise will be Okotoks' downtown business mix. The re-imagined business mix downtown will, hopefully, over the next few years include the following shops, some of which are already there waiting for additional company:

- At least 20 restaurants: Mexican, Steakhouse, Asian, Fusion, Micro-brewery, wine bar, Italian (casual), a deli or two with retail goods. Eleven dining venues currently in Old Towne.
- Five coffee shops. Two coffee shops currently.
- 2 + Micro-breweries
- Bakery and bread shop (fresh baked goods from locally sourced ingredients)
- Butcher shop
- Ice cream shop. One currently in Olde Towne.
- Movie theater
- Creative upper-level office space
- At least one book store
- Six art galleries. Three currently in Olde Towne.
- A kid's technology and innovation centre
- A robotics workshop/event venue
- A "green" plumbing, electric and home design centre
- A bike shop (purchases, repairs, rentals)
- Visitor information (with locally produced items showcased in its retail store)
- Home accents. Seven currently in Olde Towne.
- Garden shop (floral, gifts)

- Kitchen store
- Antique store (antiques, not second-hand)
- Jewelry story. One currently in Olde Towne.
- Wine retailer or wine co-op store
- Clothing stores (casual, retro and upscale). Six currently in Olde Towne
- Leather shop
- Shoe store (look at Brown's Shoes)
- Downtown lodging (boutique style hotel)
- Condo | apartment development on upper floors

In addition to making the downtown more consumer appealing, the plan will improve the connectivity from other parts of the town to downtown. Both residents and visitors need to have improved access to the downtown through well-signed pedestrian walkways as well as public transportation that is consistent and convenient.

What comes first? Getting people downtown on a consistent basis. If you can bring, 300, 400 even 500 people downtown at least 250 days of the year, particularly after work and on weekends, retailers will follow. People want downtowns more than ever before. In fact, the days of suburban malls are coming to a close. No suburban mall has been developed in North America for 24 years and counting.

Now is the perfect time to bring Okotoks' downtown increased appeal and capacity and, the two biggest, most expensive additions are the development of an open-air Plaza and an adjacent year round, indoor/outdoor Public Market Pavilion.

Key to downtown Okotoks' success, these spaces must be "programmed" space, or they will fail to bring people downtown on a consistent basis. With a public plaza, and then an indoor market/pavilion, Okotoks will, without a doubt, have the most stunningly beautiful, and active downtown in the region. These projects will create, when combined, nearly three acres of public-use space, and will draw between 300 to 1000 people downtown nearly 300 days of the year and THAT will attract retailers and private investment into downtown.

The plaza itself will have a 745 -1,115 square meter ice rink that will operate approximately 120 days a year, and then a 745 square meter splash pad that will operate during the summer months – another 120 days a year. Then you add Monday Night Movies on the Plaza, which will draw crowds of perhaps two or three thousand residents over 12 to 16 weeks, and add in concerts, shows, exhibitions, vendors, street musicians, and a host of other activities and every one of the 37,000 residents that live within five kilometers of downtown will be spending time in Okotoks – instead of heading to Calgary.

Okotoks' best days are ahead but it won't be an easy road. To implement every single recommendation in this plan will cost perhaps \$11 to \$12 million dollars including the plaza, the market pavilion, downtown improvements, wayfinding, marketing and staffing. When things are tight and tough, as the old adage states, "the tough get going."

However, this cost is an investment, not an expense. Implementation of this plan will most likely double or triple the tax base valuation of downtown properties, as it becomes an attraction in its own right. It will spur redevelopment of current buildings and parking.

A new 1,200 seat performing arts centre typically costs \$30 to \$40 million. A new convention centre would cost at least \$20 million. You can build stadiums, sports complexes, a \$25 million aquatic centre, and while these are all terrific assets, there is absolutely NOTHING the town and its citizens can do for less money that will see as greater a return on that investment, than the \$11-\$12 million it will cost to implement every single recommendation in this plan.



Some of these funds may come from philanthropy, some from grants, and from various other sources but, in the end, the town will have to do some of the “heavy lifting”. The recommendations in this plan have been proven to work and, once again, every single one is an “investment” not just an expense.

It will take a community-wide effort, but can be accomplished in three to four years, and will make Okotoks an amazing showcase community. The town will see its tax base increase dramatically, resulting in many other great things for the citizens of Okotoks.

But perhaps best of all, it will integrate the entire community by creating a downtown that is vibrant, active, inclusive, and will become the town’s “Third Place” – the place to go after work and on weekends.

So, put on your running shoes and make this happen! And never take “no” for an answer. Make sure you do it right – no cutting corners and diminishing the success of this plan and program.

## BRAND CHARACTER / BRAND VOICE

The brand character articulates the feeling of the brand. If Okotoks, Alberta were a person, what would it be like? This should translate into the execution of all elements. Communication, advertising, marketing tools, product development and even customer service programs should be consistent with the brand’s character.

- Outgoing, active, youthful
- Caring, dependable, healthy
- Environmentally engaged
- Friendly, jovial and generous
- Forward thinking, innovative and connected

## BRAND PROMISE:

The Brand Promise stated above, is the simple statement and guiding principle that should be placed on walls in every business and Okotoks municipal offices, on the front page of the town’s comprehensive plan, and in the offices of every partnering organization. It is your guiding principle for everything you do as a community. Every initiative, marketing effort, event, and development project should help reinforce the “ownership” of the Okotoks brand – the goals and feelings it stands for. The shorthand version of the brand promise can be stated as:

***Join the innovation!™***

And by that we mean welcome to a place that appreciates and nurtures creative thinkers and doers and those with a can-do attitude.

We want every citizen to experience that downtown Okotoks embraces and exhibits that invitation. Retail and programmed events should focus on creativity, life-enriching culture, and great nightlife.

## OKOTOKS’ BRAND CREDIBILITY, REASONS TO BELIEVE:

This is the tangible evidence that will be developed and communicated over the next several years for Okotoks’ positioning. It is the reason why people will believe Okotoks offers the best opportunity to realize success in creative science, technology,

the environment, as well as exposing their children to the cutting edges of their own future. It makes the claimed benefits compelling.

Accolades current (and future ones!)

- “One of Canada’s greenest communities” – Canadian Living
- The Drake Solar Community Story – Globe and Mail
- “One of Canada’s Greenest Cities of Tomorrow” – GreenLiving.com
- Leadership in Sustainability award
- A plaza and an all-weather pavilion programmed with 250+ days of activities and events
- Public art culture, cutting edge environmental technology on display
- Connectivity of the town, and a vehicular and pedestrian wayfinding system
- A robust retail mix and dining open at night with culinary and brewery arts
- Downtown public Wi-Fi connectivity
- Recreation retail and events

## KEY MESSAGES:

Primary messages should consistently support the Brand Promise and be repeated in press releases, advertising copy, website copy, photography, etc. Secondary messages support other strengths and can be used for more sector-specific marketing and promotion.

Primary:

- Join us in building a better future
- The fusion of creativity and innovation
- Design your future in Okotoks
- What’s happening in downtown Okotoks tonight?
- Connections to the Environment are in our DNA

Secondary:

- Connect to Laughter, Fun, Excitement and each other
- Innovators, risk takers & entrepreneurial spirits wanted

Bridge Brand Messaging – to be used during development of branded products in the downtown:

- Okotoks Innovating
- Okotoks coming alive

## THE LOOK AND FEEL OF THE BRAND

### The Okotoks Logo:

The Okotoks, Alberta logo and type reflect the green, forward thinking of the town. The town's name itself is central to the graphic logo so that the destination will become more familiar with every use. "Alberta" is added to indicate to consumers everywhere, its location.

At the end of this plan you will see the initial concepts used to convey the brand to your major markets. You'll notice common elements and colour palettes that would always be used to create continuity of the visual brand expression with everything you do.



### The Okotoks Tagline:

The Okotoks tagline "Join the Innovation" is part of the brand promise as well as a reflection of the innovation and creative attitude of its brand. New businesses and retail downtown as well as the new pavilion, and a plaza will support the brand.

*Join the Innovation!*

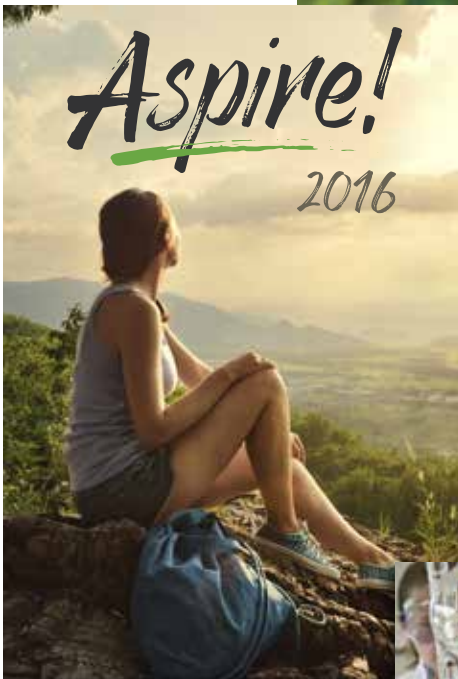
## MARKETING MATERIALS

The recommendations in this plan include creation of a number of marketing materials used to communicate with Okotoks' target markets. It is important that the assets or experiences included in these promotional pieces actually exist and are fully functional BEFORE they are promoted:

- "The Very Best of Okotoks" rack brochure
- Okotoks, Alberta Community Profile
- Okotoks top development "Opportunities" brochure
- A new stand-alone Downtown Okotoks website
- A new "Guide to Event Production in Okotoks" brochure used for recruiting outside events into Okotoks
- Brand Awareness posters to be printed, framed and distributed throughout the town
- A monthly e-newsletter



*Healthy living never gets old.*



*The very best in food  
shopping and activities*



[www.JoinTheInnovation.ca](http://www.JoinTheInnovation.ca)



## Community Profile

2016

Your resource for services & activities







# *Recommendations*

## OKOTOKS RECOMMENDATIONS

### YEAR 2016

#### 1. Form the Brand Leadership Team (BLT)

**Timeline:** Spring 2016

**Who takes the lead:** Brand Development Committee

**Approximate cost:** None

**Possible funding idea:** None required

**Rationale and/or details:** This is the first and most important recommendation of the entire effort. Without strong champions, this effort cannot succeed. After working with more than a thousand communities around the world, the only time an effort like this has failed is when strong champions weren't in place to push it forward. The Brand Leadership Team must be composed of doers – not simply directors. No one should be on the BLT just because they hold an official title if they don't plan to participate.

The BLT should be comprised of those individuals committed to “championing” the brand and making it happen. This means that even in the face of some adversity, they will push the agenda forward, they will not take “no” for an answer, and they will continue to “sell” the brand hoping to attract additional champions to the cause.

The members of this team will also be the “voice of the brand,” working in a hands-on capacity as advocates for the brand vision, being instrumental in fulfilling all of the recommendations set forth in the Action Plan.

The BLT could include key “movers and shakers” from the community: primarily business and/or property owners, downtown retailers, Town Councilors or staff, tourism and economic development representatives, chamber of commerce representatives, and others who are good communicators and committed to the brand vision.

Keep the BLT small. The bigger the committee the less likely you are to get things accomplished. This is about making something happen. Typically you'll find 9-13 great champions, but after a month or two the “real” champions stand out after the initial enthusiasm has waned. You can end up with between five and seven true champions, and they will work to bring others onboard – acting as “pied pipers” for the brand.

Local organizations and town officials should see the Brand Presentation and then decide whether or not they feel passionate about the objectives and projects detailed therein. Characteristics of a good BLT member include:

- A willingness to invest time (and in some cases, money).
- An ability to take a few hits along the way: They need to have thick skin. Not everyone will agree with the brand direction. You simply cannot be all things to all people, and you can't let local politics kill the branding effort.
- Good speaking abilities: The BLT will be asked to sell the brand direction to various groups, boards and provincial/regional organizations. They should be good public speakers and be 100% behind the brand.
- Enthusiasm: Ralph Waldo Emerson once said, “Nothing great was ever achieved without enthusiasm.” This must be the motto of the Leadership Team members. Enthusiasm is contagious!
- A willing doer, not someone who just wants to direct: Each member will be expected to dedicate two to four hours a month to this cause, attending meetings, speaking to various groups, coming up with great ideas, paying attention to details, and pushing the effort forward.

- The Team will also be the “brand police” when it comes to key marketing messages, use of the brand identity and tag lines. They are also charged with making sure the brand stays narrow – to resist “brand creep,” as there will be a desire to keep broadening it until it becomes more and more generic, and thereby less and less effective.

In addition, individuals with something to gain from the implementation of the plan also make good BLT members. They’ll work all the harder to see it succeed. This entire effort will rest on the shoulders of the BLT. Without champions, the branding and product development process cannot succeed and nothing will come of this plan.

Who can benefit from the brand and should be strong champions?

- Downtown property owners
- Downtown businesses: particularly retailers, restaurant and entertainment venues
- Artists, culinary and other artisans, eco and action sports providers
- Innovators in the environmental “green” sector
- Public market vendors (part of this plan includes the development of an indoor, year-round public market)
- Hoteliers and tourism industry operators

The first order of business is to set up some ground rules. This is a group dedicated to working with the organizations that can make things happen. You might consider this a “booster club” but with some heavy hitters and the ear of key organizations. They must work together, put their personal agendas aside, and stay positive.

Ground rules might include:

- Number and frequency of meetings. Some meet every other week for the first six months as assignments are fleshed out and implemented, then they reduce the schedule to one meeting a month – and additional meetings as needed for consultant selection or other special to-do items.
- Assignments:
  - Have one person take minutes and act as the BLT secretary.
  - One would organize and remind members of meeting times and dates.
  - Another would be charged with setting up the speaking engagement calendar: Developing a list of organizations, contacting them with times during the year they’d like to see what’s happening. This person would hand out assignments to fellow members – such as which event they would individually speak at.
  - A BLT member would be charged with the PowerPoint (or Keynote) and graphics so that everyone is using the same resources. A unified message is very important.
  - One would work with the town or other funding organizations to set up times to review proposals, Requests for Qualifications, and to set up meetings for interviews or the selection process.
  - The “BLT Brand Cop” would be the person gathering branded marketing pieces created by partnering organizations and materials generated using a Brand Style Guide, and then presenting them to the BLT for approval.
- If a member misses more than two meetings in a six-month period, they are removed from the team. This effort, particularly in the first year, requires a commitment to be a doer – including attending meetings and playing an active role in the effort.
- Generally, BLT members would serve for two years, and then among themselves would invite new members to come in as needed. So the entire BLT is not changed over at the two-year mark; there will be some natural attrition. What you don’t want is the BLT to think their job is finished at the two-year mark. This could result in the disbanding of the BLT. So the two-year rule is simply a guideline. Some champions would stay for the long haul, and as long as the enthusiasm doesn’t wane, bring them on!

A brand cannot be built without investment, and the initiatives in the plan require both public and private investment. Therefore, this team must be willing to take a stand and be the voice of reason.

The key is to have a small enough team so that things can actually get done, since this is about implementation. There may need to be additional people on the team from time to time – it's good to allow some flexibility.

If it is possible to develop a larger BLT without politics and personal agendas interfering with progress, then the more people on the ground, the more effective the effort will be.

With a strong implementation program, once the brand starts moving, it will take on a life of its own. Generally, the idea is to have the BLT work itself out of a job after five to seven years. Once again, this is not a steadfast rule, but at some point perhaps an organization will take on the role of brand cop and another take on product development, etc.

The life of a BLT typically ranges between five and twenty years. As the brand takes hold, meetings can be less frequent. In some cases, the BLT becomes a registered non-profit agency with some funding mechanisms to take on specific projects tied to the brand development effort. In other cases the funding is run through a local economic development organization.

It is important to point out that branding is never done. You cannot rest on your laurels. If you are the best, people will be gunning for you. Just think about Napa Valley. How many wine regions in California alone are looking to topple Napa as the wine capital? Likewise, Disney doesn't remain static, but adds new attractions and events all the time. Winners can never rest, so this is not something you start and then walk away from. There will always be a need for champions of change.

Remember, there are only three killers of any branding product:

1. Local politics
2. Lack of champions
3. Lack of money, both public and private

If you have great champions, they will get through the local politics and find the money and/or the development interests to make it all happen. No brand can succeed without tireless champions who pioneer the effort. This is the BLT's mission.

Once again, this is the most important decision in the entire Action Plan. Read the plan, adopt it, then become Champions for Change – active pioneers in bringing it to life. If you ever want to create a lasting legacy, this is the perfect vehicle.

The importance of the BLT with committed brand champions cannot be overstated. We surveyed 400 well-branded cities in North America, and in 397 of those communities, development of the brand was a grassroots effort. Rarely will a top-down effort yield success. Why? Elected officials are voted into office to be all things to all people, yet brands are about being known for something specific. The days of "we have something for everyone" are over. In this age of specialization, you must jettison the generic. A generic branding effort yields a watered down, mediocre, ineffective brand.

These individuals will do the work to see that the product is developed that will bring the brand to life, fulfilling the brand promise. The concerted effort by these people will be the force of the entire branding effort, keeping the brand image in focus, keeping the plan on track and overseeing the successful development of the brand.

Make sure that more than half of the BLT represents the private sector. As noted earlier, top-down branding doesn't work. The best branding efforts in North America were grassroots efforts and include Nashville's country music brand, Napa Valley and wine, Orlando and Disney World, Branson, Missouri and music theater, Hershey, Pennsylvania and chocolate, even Frankenmuth and its Bavarian brand.

For more about organizing for Brand initiatives, view Roger's video entitled "Getting Everyone on the Same Page, Pulling in the Same Direction."

## 2. Brand Leadership Team assignments

**Timeline:** Spring 2016

**Who takes the lead:** Brand Leadership Team

**Approximate cost:** None

**Possible funding idea:** None required

**Rationale and/or details:** Set a regular schedule for the Brand Leadership Team (BLT) to meet. Here are the topics to cover in this first meeting:

Set up two committees:

1. The Marketing Team would handle all brand-related marketing from brochures, website makeovers, and approvals of all things brand related when it comes to graphics – including wayfinding signage design.
2. The Product Development Team would be charged with pushing the development of the downtown plaza and a downtown public market forward, as well as working to recruit an upscale downtown boutique hotel and various retailers and businesses as outlined throughout the plan. They would tackle beautification, façade upgrades, new town bylaws and other product development initiatives.

The BLT should establish a speaking circuit tour. Implementation of this plan requires considerable time and effort but will be the very best thing the community can do to change the perceptions of Okotoks, and make downtown a vibrant and active destination for its residents and visitors. This message needs to get out to the general public.

Make a list of local organizations that hold monthly, quarterly or annual meetings including (but not limited to) school boards, Chamber of Commerce, town council, economic development, tourism, hospital boards, Kiwanis, Rotary, other auxiliary organizations, cultural and ethnic groups, downtown businesses – every local organization in the town, and even at the provincial level.

Here's a starter list:

- Local school boards
- Hospital board
- Chamber of Commerce (boards and general membership meetings)
- Auxiliary organizations including Kiwanis, Lions Club, Rotary, and others
- Town officials and staff
- Economic Development (local and county-wide)
- Secondary educational institutions
- Downtown businesses
- Industrial or applied arts groups
- Regional and Provincial tourism officials and representatives
- Your local MLAs
- Local clubs and organizations. The best way to recruit new events is to ask local club members to encourage their groups to host events in downtown Okotoks.



Finally, create a yearlong calendar, pick your four or five BEST speakers on the BLT, and then schedule them to speak at the various events. Remember, “Nothing great was ever achieved without enthusiasm.”

Assign Brand Leadership Team members to contact each organization. Set up a time for the BLT members to give a presentation to each of these organizations over the next six to eight months.

We left you with the PowerPoint/Keynote presentation that can be redeveloped to fit the time limit and the speaker’s style, as well as the recording of Roger’s presentation.

The idea of this is to “sell” as many people as possible on the brand direction. You want to hear their ideas on how to make it happen and new ways to make the brand even stronger and more successful. For example, if people belong to a robotics club, would they consider having that organization host a robotics tech show in Okotoks once the plaza has been developed? How about quilt shows? Do they know local artisans that would love to host a show in downtown Okotoks?

The goal is to garner support, new ideas, and to get the community excited about the brand, and work towards changing the minds of the “naysayers” through the positive action that will develop through each step of the action plan.

From the presentation provided in Apple Keynote and PowerPoint formats, each BLT member charged with promoting the brand should take that one-hour presentation, modify it, and make it their own. In most cases you’ll only have 20 minutes to speak. Here’s what we’d suggest take place during that presentation:

- Two minutes to let the audience know that branding is more than logos and slogans. It’s the essence of whom you are and what you want to be known for.
- Three minutes to explain why branding is important: We have every city and town in Alberta at our fingertips via the web, so what sets Okotoks apart from the others? Why should someone live, establish a business, or visit the town? What sets you apart and makes you the destination of choice? And make sure you mention money: This is about importing new cash, and keeping locally earned cash in Okotoks. This is about tax base and community development.
- Two minutes about the process: More than 900 locals weighed in and the brand direction was founded on feasibility, not just local sentiment.
- Ten minutes selling them on the product that backs up the brand:
  - Development of an amazing downtown through establishment of the public market - a showcase for the entire state
  - A year-round plaza downtown
  - Downtown redevelopment with an orchestrated business mix
  - Innovation and technology in the environmental fields, downtown culinary and brewery arts and recreation that Okotoks will be known for
- And then just three minutes showing them the look and feel of the brand. Do NOT concentrate on logos, but show them the concept ads, pole banners, wayfinding signage, so they can see what the brand looks like.

You should also, on the last slide, place a URL where the audience can sign up for your free monthly e-newsletter that will showcase upcoming events in downtown Okotoks. This is an easy way to create “top of mind awareness” and to start building your database.

Once again, the big focus is to educate people to understand why you’re doing this (and why it’s important) and to ALWAYS be working to bring in more champions. The more people who buy into the brand, the stronger and more ingrained it becomes as the heart and soul of the community.

The result is to end up with a 2016 calendar that is filled with speaking engagement opportunities to promote the brand

direction. The most successfully branded communities are more than skin deep; the brand is the soul of who they are, and that means a dedicated public outreach effort is necessary to achieve ultimate success.

Finally, assign one person to follow-up with members of the BLT to make sure they are contacting their assigned organizations, that presentation times are set, and that other members of the BLT are aware and can show up to offer additional support. Maintain a list of organizations that have been shown the brand direction.

Please remember that this brand is more than just the public market or plaza. It also includes further recruitment of green technology and consumer evidence of that in the downtown development.

Down the road, develop a list of province-wide conferences where you can share your branding experience with large audiences, telling them what you've done to revitalize downtown Okotoks and selling them on why they **MUST** pay a visit to the town. Once they visit, chances are they'll be back to see your progress. While this takes time, it's free and will spread the word throughout the province.

### 3. Secure marketing domain names

**Timing:** Spring 2016

**Who takes the lead:** BLT and Marketing, Promotion & Tourism Services

**Approximate cost:** \$150

**Possible funding idea:** General funds

**Rationale and/or details:** Domain Names: With any branding project one of the first priorities is to secure the domain names that will help promote the brand. The Brand Committee already has ideas for several that were created during the Brand Camp week.

We recommend the BLT brainstorm other ideas for domain names that should be reserved. All of these would point to the splash page of an Internet gateway to the Town website and a new tourism-based website – one of the recommendations included in this plan. Securing domain names costs between \$5 and \$7 a year and hosting each may be in the \$5 a month range, so it's not a big expense. Keep in mind that the domain name should help sell the experience – it's actually part of the marketing effort.

### 4. Contract with someone to begin implementation of this plan

**Timeline:** Spring 2016

**Who takes the lead:** BLT, Town of Okotoks

**Approximate cost:** \$80,000

**Possible funding idea:** General funds

**Rationale and/or details:** It is important to get working on these recommendations right away, and it will take the efforts of volunteers, contracted consultants, and town staff. Assigning management and execution strictly to existing staff will simply put these efforts on a list of other tasks they are required to work on. Until you can find an experienced, proven permanent brand manager to come onboard, contract or hire someone who understands the purpose of this effort to begin working with the Brand Leadership Team and the Town on these Action Plan items. This person should not be someone hired just because they have some background in tourism or events or convention and visitors bureaus, but someone with measureable successes and experience in town planning, real estate, and marketing, getting RFPs, and managing consultants. This person should be a doer, not just a manager.

## 5. Review the plan every month and update it every year

**Timeline:** Spring 2016, ongoing

**Who takes the lead:** BLT, Town of Okotoks

**Approximate cost:** None (staff time)

**Possible funding idea:** None required

**Rationale and/or details:** This document is not a comprehensive plan or even a strategic plan. As an Action Plan it is fluid and needs to be looked at continually, massaged, and updated. You want to avoid this becoming a plan sitting on a shelf gathering dust. It is your reference and guidebook for the next three to four years.

It should be reviewed every month and updated at least once every year. You will add things to it, rearrange things, add case histories or new ideas, and use it to determine budgets. It should be a guidebook for the town's comprehensive economic development effort. It should be used by Economic Development Services; Town of Okotoks; Marketing, Promotion and Tourism Services; and Research and Information, as well as the Brand Leadership Team and the Town Council with regards to policy direction and budgeting.

If you need assistance in updating it, contract with Roger Brooks International or another firm to take a hard look at the recommendations, costs, projects and what's happened to date, what can be checked off (already completed recommendations) and what should be added to it.

The more often you review and update it, the easier it will be to keep your focus narrow and all of your organizations on the same page and pulling in the same direction.

## 6. Register (trademark) your brand identities and tag lines

**Timeline:** Spring 2016

**Who takes the lead:** BLT, Marketing, Promotion and Tourism Services

**Approximate cost:** \$2,500

**Possible funding idea:** General funds

**Rationale and/or details:** We recommend that you register your logo and tagline, and other brand identities – town, downtown organization, plaza and pavilion. A “trademark” or “TM” is used when people have sent in an application to have something registered with the Trademark Office. It basically says, “Hands off – we’re applying for ownership. A “registered trademark “R” means it is registered with the federal government and the applicant owns it.

A Patent Attorney can accomplish this for about \$2,500 or so depending on what all you are registering.

## 7. Create a structure for the Brand Action Plan development effort

**Timeline:** Spring 2016

**Who takes the lead:** BLT, Town of Okotoks, Town Council

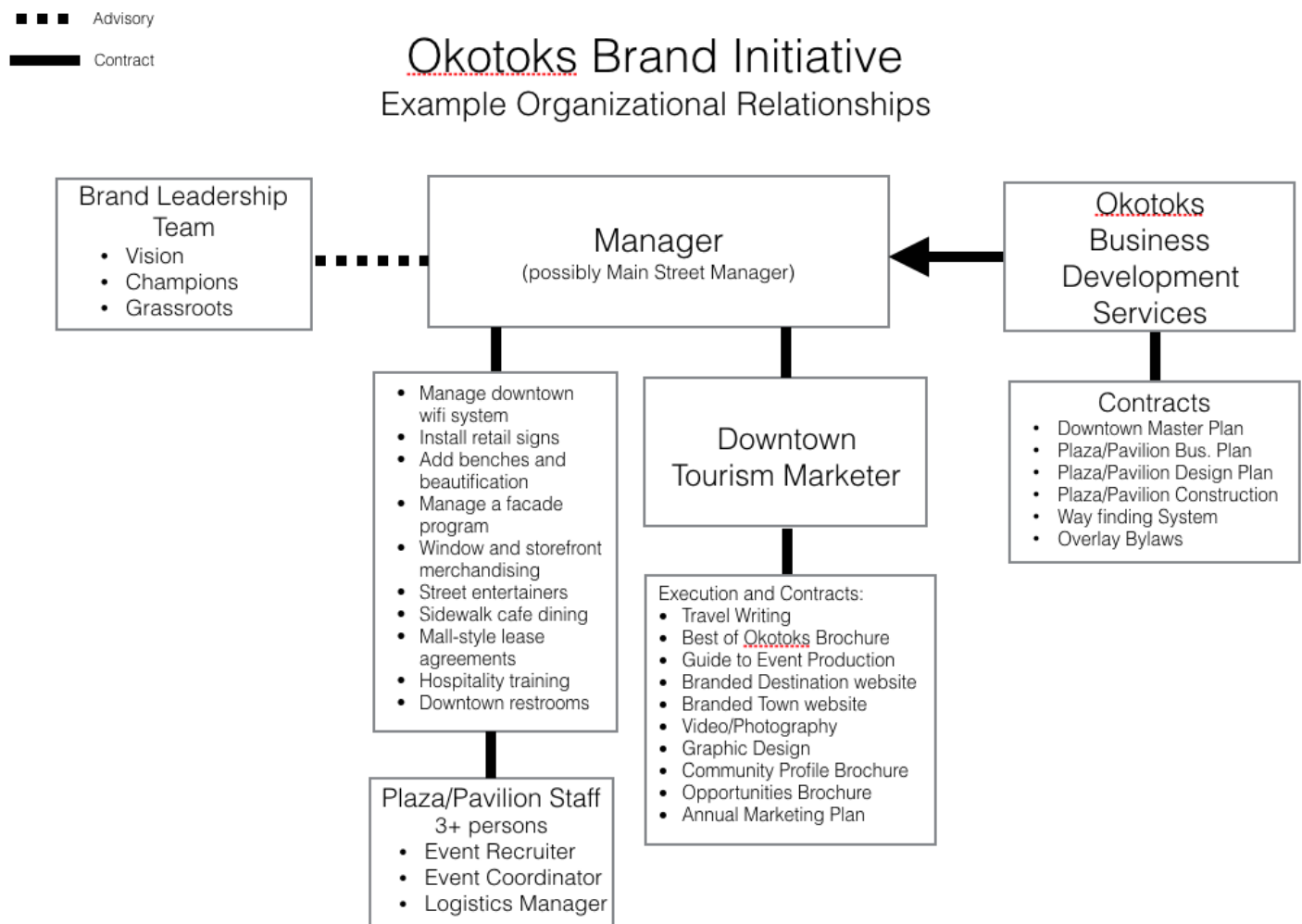
**Approximate cost:** Individual cost components listed elsewhere

**Possible funding idea:** None needed

**Rationale and/or details:** Successful execution of the Action Plan recommendations will require a public/private partnership. The Brand Leadership Team – comprised of Brand Champions, provides the energy and advocacy to push the Plan initiatives,

help generate grant funds, keep the effort on track and monitor use of the brand identity. The Town will guide or implement many of these recommendations and will be the conduit for the raising of funds. Having a clear organizational structure for implementation of these many tasks will be important.

Execution of the tasks in this Action Plan includes planning functions, marketing functions and operational functions. Many of the tasks will require contracted professional planners as well as new town staff with experience in their appointed tasks. You may want to do this entirely within the municipal government structure or you might consider setting up a non-profit organization that will become the recipient of funds in order to take on improvements in the downtown, as well as many of the marketing tasks for the brand. This would require a full-time manager to accomplish some of the work, and later adding staff positions to handle the marketing for the destination and a staff of three to run the Plaza and Pavilion. You should consider establishing a Main Street Canada program as the lead organization for many of these tasks. The Main Street program would tap into available grant funds and hire a full time operational Main Street Manager specifically to execute several of the Action Plan tasks, including: installation of retail signs, a downtown Wi-Fi system, benches and beautification, hospitality training, as well a façade program for downtown storefronts.



The reason for having a non-profit organization do this is to have it managed by a board of downtown and town wide stakeholders who have a vested interest in how the money is spent, and also bring their retail experience to the project. Keeping the private sector in the decision making process is very important.

The Plaza and Pavilion staff would then be Main Street employees. A staff of three will recruit events into the Plaza and Pavilion, receive and account for revenue from vendor and event organizer fees and expenses, market the Plaza and Pavilion events, and operate the day to day functionality, including retail leases, setup and take down of booths, tables, chairs, stages, lighting, and other amenities associated with events and other operational functions.

The Town of Okotoks office or another town office could provide the legal home for soliciting grants, collecting funds, receiving Community Revitalization Levy (CRL) funds and Business Revitalization Zone (BRZ) funds, soliciting and entering into contracts for planning and construction of the plaza and market pavilion, administering legal documents, and contracting with some of the larger planning and vendor organizations.

Not all of this has to take place immediately. Get funding to hire a full-time Main Street Manager (with skills in the assigned tasks, NOT an events coordinator), and work with the Town of Okotoks to receive town funds and contracts to implement their recommendations in this Plan under the schedule provided. Plaza and Pavilion staff should be hired at least six months prior to completion of the plaza so they can begin recruitment of events and marketing.

## **8. Contract for graphic design marketing and messaging services**

**Timeline:** Spring 2016

**Who takes the lead:** Downtown Tourism Marketer

**Approximate cost:** \$30,000

**Possible funding idea:** Town of Okotoks

### **Rationale and/or details:**

During the Branding process “BrandCamp” certain graphic elements were developed to represent the logo (visual identity) of the brand, example print advertisements were mocked up, and some other graphic elements were created as examples, such as banners, wayfinding signage, and merchandise. Graphic design will be needed to apply these designs to actual advertisements with copy and owned photographs, an implemented wayfinding system, seasonal banners, etc.

Likewise, copywriting will be needed as the branding process is executed over many years.

**Graphic Design:** The look and feel of the brand is a critical element of its long-term success. Hire the very best and then negotiate the fees with them. They will be your partner in protecting the brand, and must have a clear understanding of what branding really is. They must know how to evoke emotion and create top of mind awareness. The goal is to have everyone in your regional market asking, “I wonder what’s happening this week in Okotoks?”

They will be charged with working from the Brand Style Guide, designing marketing materials and templates for partnering organizations, posters, give-away items, billboards, radio, television, video content, photography, key marketing messages, website content, etc.

Continuity is also critical: You MUST have all of your partnership organizations using the logo and other identities as they are defined. Imagine the nightmare Coca-Cola would face if every Coca-Cola bottling plant designed its own Coke logo, bottle and can design, ads, trucks, etc. It wouldn’t be one of the world’s top brands. In fact, it wouldn’t exist as a company.

You have one chance to do this right, so securing the best graphic design expertise you can find is essential. They do NOT need to be local, although if local talent is available and eager to be a part of the effort, then by all means keep the money



local. You may see fit to hire someone outside the area the first year, so you end up with a toolbox full of initial design elements that can simply be refreshed locally.

Issue a Request for Qualifications and let them know they will be charged with a number of projects including:

- Brochures and printed marketing pieces
- Website page layout and design
- Logo gear and collectibles
- Billboards, and outdoor advertising
- Pole banners
- Ads (radio, print, television – down the road)
- Anything and everything that portrays the Okotoks brand



Pick the top three firms (or people) after issuing the RFQ. Qualifications should include:

- Successful examples of promoting communities
- Experience promoting tourism, chambers of commerce and economic development organizations
- Depth with print advertising, design and production of promotional materials
- Style Guide creation experience
- Talent (the most critical element. Look at the work they've done: Does it make you want to go there? To buy the product they are promoting? If not, go to the next one.)

- Range of talent (an art-focused brand looks a whole lot different than someone promoting rail history, for example. Do they have range?)
- Social media expertise (setting up a YouTube channel, Facebook Fan Page, Twitter account, etc.)
- Editorial photography – the type of photos you'll use to promote your key messages. With this brand, photography, including videography, will be critically important. This team would be charged with assisting with assignment photography and the creation of a great photo library.

**Travel-writing:** Graphic design is only 50% of what your creative team will need to do for you. The other 50% is the messaging: the written text. You may be better served by getting a marketing agency that has expertise in written word, graphic design, digital marketing, especially managing social media blogs, and public relations. The written word is JUST AS IMPORTANT as the visual graphics.

Interview your top three picks and pick the one you think is the most talented, will be timely in submitting ideas and deliverables, is affordable, is easiest to work with, and understands what branding really is. Many graphic designers and writers are defensive of their work, and you need someone (or a team) that will listen to you and do you proud.

They should be paid on a per-project basis and would bid each project with a not-to-exceed cost so that you can work with tight budget restraints. But DO spend the money to bring in professional graphic design and copywriting expertise. It's important in everything you do.

At the end of each year (or every other year) you'll want to put the marketing "out for review" meaning you'd consider other companies. While you don't want to go through a host of marketing companies, you do want them to keep a sharp pencil in terms of costs! After all, they are likely to get other work from local businesses as a result of their branding efforts with you.

## 9. Contract for the creation of a Brand Style Guide

**Timeline:** Spring 2016

**Who takes the lead:** Brand Leadership Team (BLT)

**Approximate cost:** \$17,500

**Possible funding idea:** Town of Okotoks

**Rationale and/or details:** Before people start redeveloping brochures, websites, new letterhead and business cards, the top priority is to create a community-wide "Style Guide" or "Brand Standards and Practices Manual."

The Style Guide will be the "bible" every organization (town, downtown development and marketing, tourism) will use to create continuity with your brand direction. There is a tremendous amount of enthusiasm in Okotoks ready to use the new graphics immediately, but you can't let it get out of control, so the Style Guide is a top priority.

Right now you have a general look and feel of the brand, but it's time to get down to specifics and particulars. That's what a Brand Style Guide does.

The Brand Style Guide, or standards and practices manual, will contain graphic design standards for logo and slogan use, guidelines for website development, guidelines for the production of printed sales and marketing materials, as well as the proper use of key marketing, advertising and promotion messages.

The BLT will be responsible for overseeing proper use of the graphic identity. This Style Guide will provide the official guidance for how to use the community's graphic identity.

#### Sample Table of Contents:

- Brand Overview
- The Brand Identity
  - Clear space and sizes
  - Proper uses
  - Improper uses
  - Sub logos
  - Tag lines
- Brand fonts and colours
- Business cabinet
- Printed materials
- Signage and pole banners
- Electronic media
- Usage guidelines and sample usage agreement



Examples of approved logo and brand use should be provided in the guide. This includes dimensions and minimum sizes, as well as fonts and colours. Logo colours must be identified as specific Pantone colours and/or as percentages of the four process colours: cyan, magenta, yellow and black (CMYK). Guidelines for reproducing the logo in black and white and in one colour need to be included.

Wrong usage of the logo (in structure, colour or fonts) needs to be spelled out. Combining the logo with other logos or branding elements should never be permitted.

Web design concepts should be illustrated showing use of the logo, colour palette, and structure. RGB and HTML colours should be listed. Examples of PowerPoint presentations with the logo should be incorporated.

Continuity and consistency are critical when developing a strong branding program that creates top of mind awareness of the brand. The logo and brand design should give the community an easily recognizable identity – a symbol and message that represents the community and the experiences it has to offer. Whenever the logo is used, it should bring to mind images of enjoying that community.

Repetition helps reinforce the viewer's perception, but consistency is the only way to ensure logo and brand recognition. That is why the Brand Style Guide is a highly detailed document, providing specific instructions on how to use the graphics – font sizes, colours, guidelines for reproduction, guidelines for web design, PowerPoint presentations, and advertisements. Examples of logo use should be provided for the town and local organizations that will utilize the logo, as well as for signage and wayfinding.

All organizations that market the community need to do so with consistency in the look and feel of their marketing. The Style Guide helps get everyone on the same page, pulling in the same direction. The BLT should work with all marketing organizations that promote the community on proper use of the logo and other graphic elements to create a unified, consistent look and feel.

A Brand Style Guide costs approximately \$17,500 to develop, and you can have it done locally by a qualified graphic design firm, or by someone like Roger Brooks International's Creative Director, Greg Forsell.

The Style Guide includes:

- Final identities for the downtown, the municipal town government, and your partnering organizations with variations in full colour, two-colour and black and white, and in various formats
- The proper use and spacing (along with identified improper uses) of your brand identities
- The look of your business papers (letterhead, envelope, business cards, labels, your e-mail signatures)
- The colour schemes, patterns, font styles for headlines, body text, and other elements of your websites and printed materials, and print advertising
- Guidelines for photography styles and other imagery
- Tag lines and key marketing messages
- Guidelines for brochure covers
- Website home page and interior page guidelines
- Outdoor (billboard) marketing guidelines
- Print advertising (full page, half page, and 1/3 page guidelines)

It may include other elements as well, but this is the Guide every partnering organization would use for all of their marketing efforts. Continuity is absolutely key to a successful branding program.

If you take this out to bid, we advise you issue a Request for Qualifications, not an RFP. Find the very best, then negotiate a deal, scope of work and timeline with them. If you'd like an example of a Style Guide, let us know and we'll send a PDF for you to review.

## 10. Find “Start Up” funding for initial downtown development efforts

**Timeline:** Spring 2016

**Who Takes the Lead:** BLT, Okotoks Town Council, Economic Development Services

**Approximate cost:** \$257,500

**Possible funding source:** Town general funds, grants,, CRL funds

**Rationale and/or details:** This plan calls for a manager, several employees, and several contracted planning efforts. This recommendation asks the town to provide initial funding to jump start the recommendations made in this plan. The initial planning costs include the following:

- Downtown Master Plan development \$85,000
- Plaza and pavilion design, programming and business plan \$70,000
- Brand identity registrations \$2,500
- Okotoks Branding Manager position \$80,000

The manager position (or Main Street Manager position and an activated Main Street Program) is going to require annual operational funding at an expanded budget level as the plaza, pavilion and marketing activities come online. Consideration should be given to the start up of a Business Revitalization Zone (BRZ) so that it can be self-supporting. Keep in mind that the plaza and pavilion WILL generate some revenue from rentals, sponsors, sales, etc. The goal eventually is to have the town or BRZ subsidize it to about \$50,000 a year with the remaining \$250,000+ coming from generated revenues.

So why should the town do this? The goal is to triple or even quadruple the tax base in downtown Okotoks: property taxes, retail sales, new jobs, and reduction of leakage of locally earned money being spent in other nearby destinations. This investment will also make Okotoks a more desirable place to live, raise a family, start and/or expand a business, and will attract new larger-scale job-generation businesses, including industry.

Without a full-time staff dedicated to implementing this plan, it will be relegated to a shelf to be implemented by either volunteers or other town and organizational staff members who already have full agendas. Adding this to “the to do list” will doom it to failure.

## **11. Create a Downtown Development Master Plan for a plaza, eventual market/pavilion, shared parking and pedestrian-focused redevelopment**

**Timeline:** Summer 2016

**Who Takes the Lead:** BLT, Town of Okotoks

**Approximate cost:** \$85,000

**Possible funding source:** Town general funds, CRL funding, grants

**Rationale and/or details:** This recommendation is to contract with an urban planning firm to develop a Master Development Plan, or alter your existing Master Plan for downtown Okotoks. This site plan will offer location-specific recommendations for the plaza and pavilion venues, buildings opening onto the plaza, restaurants with sidewalk café dining, café dining on the plaza, a mix of destination retail shops, a possible downtown movie theater, upper story residential, a downtown boutique hotel, the role of the creative live/work space, and a micro-brewery or two.

The Master Development Plan will be a primary marketing piece in recruiting the right business mix in downtown Okotoks. While locations are not set in stone, this plan will become a “guide” showcasing what downtown Okotoks will look and feel like in seven to ten years and beyond.

It will include the following elements:

- Location of the plaza and market pavilion, and their configuration
- Streetscape design (wide sidewalks, where additional street trees should go, pocket parks, vendor spaces, angle-in parking, narrower streets)
- Orchestrated business mix, including redevelopment options for existing properties – showcasing recommended locations and area for each shop
- Public and public-access parking (garage or ramp, on-site and off-site parking in various locations)
- Visitor information and public washroom facilities on Elizabeth Street
- Upper story development options (upper story professional office and residential development)
- Street musician/busker spaces
- Sidewalk café dining spaces
- Pocket park, and bulb-out traffic calming
- Street configuration (or re-configuration)
- Pedestrian wayfinding signage
- Architectural renderings showing primary colours and building materials



- Renderings showcasing the business mix
- Retail blade signage standards
- Pedestrian retail areas (without vehicular traffic)
- Downtown access and egress from primary thoroughfares
- Pole banners

The Town would issue a Request for Qualifications for urban planning and design expertise for the creation of this Downtown Master Development Plan. It will become a primary marketing piece in recruiting the proper business mix, and will give property owners a guide as to the highest and best use of their properties – orchestrating the business mix that will provide them with the highest rent per square meter.

#### **Deliverables:**

- General architectural guidelines in terms of façade improvements (two or three colour renderings)
- Conceptual site plan for the core downtown area including public amenities (parking, streetscapes, vendor spaces, washrooms, visitor information, wayfinding)
- List of specific business types to be recruited or enticed into downtown, by specific locations

Note: before any potential locations of the plaza and pavilion are made public, it would be important to use a third party to acquire purchase options on the selected parcels, so the town can acquire the parcels at market rates.

## **12. Begin the process of raising the public and private funds needed to complete all the Action Plan tasks**

**Timeline:** Summer 2016

**Who Takes the Lead:** BLT, Town Council

**Approximate cost:** \$11.7 million

**Possible funding source:** All sources

**Rationale and/or details:** All of the recommendations in this Action Plan that require funding can be accomplished for around \$11.7 million dollars. All of these expenditures are a necessary part of creating the downtown branded destination. It will make Okotoks a more desirable place to live and raise a family, to start a new business, and to make existing retail thrive and grow. Nothing that is not needed has been added to the list of recommendations; they all work together like a puzzle, to create the best possible image of Okotoks.

Not all of it will have to be raised right away, or locally, but several million will be needed from some form of local financing mechanism applied to the local community. Raising funds locally will demonstrate to other providers – federal and provincial agencies, non-profit foundations, and private investors that the local population believes in the brand development, and is committed to making it happen. In addition to the BLT, possibly a Main Street Program and the Town will need to work with grant writers in pursuing other funding sources.

There are a number of ways to generate the needed funding:

- Community Revitalization Levy (CRL) for planning and construction
- A possible Business Revitalization Zone (BRZ) for marketing and operations
- Provincial Grant programs
- Private sector investment

In summary, the funds required include the following:

- Trademarks/Registrations - \$2,500
- Professional graphic design and travel writing - \$30,000
- Brand Style Guide - \$17,500
- Manager for plan implementation - \$80,000 annually
- Downtown Development Master Plan - \$85,000
- Plaza and pavilion design, programming and business plan - \$70,000
- Downtown Business Revitalization Zone - \$65,000
- Curb appeal program - \$10,000 annually
- “The Very Best of Okotoks” brochure - \$17,000
- Brand awareness posters - \$5,500
- Vehicle and pedestrian wayfinding system - \$270,000
- Public Relations and marketing contract - \$50,000
- Action Plan annual update - \$20,000
- Community Profile brochure - \$7,000
- Opportunities brochure – \$7,000
- Spokesperson on video - \$3,500
- Mobile Visitor Information Centre - \$10,000
- Downtown business recruitment - \$100,000
- New Okotoks website - \$30,000
- Downtown zoning overlay - \$60,000
- RBI review workshop - \$12,500
- Plaza development - \$5,000,000
- Pavilion development - \$5,000,000 +
- Plaza/pavilion staffing - \$300,000 annually
- CRM Software - \$2,500
- Guide to Event Production in Okotoks - \$12,500
- Downtown Wi-Fi - \$75,000
- Additional street trees - \$120,000
- Street entertainment/buskers - \$10,000 annually
- Hospitality training - \$6,000
- Decorative street crossings - \$90 per square metre
- Pole banners - \$7,500
- Shared parking structure – To be determined
- Marketing, advertising and publicity plan - \$200,000
- Professional video and still photography – \$30,000

### 13. Consider a downtown Business Revitalization Zone (BRZ) to fund operational recommendations in the downtown

**Timeline:** Summer 2016

**Who Takes the Lead:** Downtown property and business owners, Economic Development Services, Research

**Approximate cost:** \$65,000

**Possible Funding:** Town general funds for consulting on establishing the BRZ

**Rationale and/or details:** RBI has recommended that the Brand Leadership Team be comprised of energetic advocates who will make this plan their own, and drawing from the presentation materials, create their own presentations and reach out to the downtown businesses. Creating enthusiasm for the brand and bringing retailers and building owners on board is critical to making the brand vision a reality. One good reason is the need for both public and private funding. The development of a BRZ district, is a good source of funding, but is dependent upon grassroots acceptance of the vision and a willingness to invest in the future.

A number of recommendations in this Action Plan, particularly operational functions to be carried out may not have access to funds that are restricted to capital investments. In addition, this plan should be a public/private cooperative effort. A BRZ is one way funds can be acquired from those businesses within the private sector that will benefit the most from downtown improvements. Operational funds will be needed for the following:

- To help offset the cost of Okotoks' plaza and pavilion full-time staff, particularly until these operations begin to generate their own revenues.
- Downtown marketing (website, posters, advertising, public relations, social media, marketing partnership development, co-op advertising)
- Façade-side beautification efforts (benches, pots, planters, guidelines for extending window displays to exterior spaces, retail blade signs) – investments that the private sector should make, rather than the Town.
- Management of the plaza and other downtown amenities
- Seasonal pole banners and decorations
- Business-mix recruitment (working with property owners to attract the right tenant mix)
- Working with property owners on defined operating hours and days in all lease agreements
- Applying for grants for façade improvements, signage, wayfinding
- Recruitment of outside-produced events into downtown Okotoks
- Logistics and maintenance of the plaza and pavilion public spaces

The Town of Okotoks would issue a Request for Qualifications to contract with a firm that specializes in the creation and development of Business Revitalization Zones. The consultants will work with the town and downtown property owners to determine the level of funding, how that funding would be assessed (often by type of business, number of employees, area, etc.), and how the funding will be spent.

As a starting point, we would recommend creating a budget of about \$300,000 a year in property assessments of which a third would be used for improvements (streetscapes, benches, seasonal plantings, pole banners, decorations, etc.), a third for a regional marketing campaign, and a third to help offset management and programming of the plaza and pavilion programmed events, and to assist with business recruitment into downtown properties.

The assessments may be phased in over one, two or three years allowing time for property owners to secure tenants and work on property improvements per the downtown development master plan.

#### 14. Begin the transition to the new brand identity (logo and tagline)

**Timeline:** Summer 2016

**Who takes the lead:** Brand Leadership Team (BLT)

**Approximate cost:** None (items are simply replaced as normally needed)

**Possible funding idea:** None required

**Rationale and/or details:** The 2016 calendar year is the “getting ready” year, meaning that this is the year dedicated to product development initiatives, programming of the pavilion, working toward 250 activity-days downtown, creating new marketing materials, and gradually introducing the new brand identity, wayfinding signage and pole banners. This transition does not need to be expensive.

When a town council or staff person, for example, needs new business cards printed, they would be printed with the new look and feel of the brand. Over time, letterheads, utility billings, envelopes, business cards and even vehicle graphics would change to the new branding. The transition might take 12 to 18 months, and that’s just fine. People will come downtown, and people will invest in downtown because it’s a popular gathering place, not because there’s a new logo on printed materials or signage.

The transition should also apply to any marketing the Economic Development Services, Chamber of Commerce and other supporting organizations do over the next couple of years. In fact, once the Brand Style Guide is adopted, copies should be distributed to your partnering organizations.

NOTE: EVERY use of the brand identity, tagline and marketing messages must be “approved” by the BLT before printing so that they comply with the rules outlined in the Brand Style Guide. One of the primary functions of the BLT is to “police” the brand-mark (logo) and the messaging, just as is done by any major brand. As brochures, pole banners, wayfinding signage, print ads, billboard displays, trade show booths, business papers, newsletters, etc. are developed, the BLT must approve each. This is imperative to assure the strength of the brand.

Every website, from local schools, the library, town, economic development and Chamber of Commerce should reflect the Okotoks brand identity graphics. This does not mean that every website has to be cookie-cutter to every other website, but there should be common graphic elements, common themes in terms of text, and links to each other. The Brand Style Guide is the reference for making this happen. The BLT Marketing Committee should encourage other local websites to include elements of the brand in their marketing efforts, even to the point of creating sample versions for them to consider that fit the “family” of logos for the destination.

While private businesses cannot use the Okotoks brand logo in their marketing efforts (unless it is a cooperative marketing project), they should be encouraged to play up the brand. The brand identity can ONLY be used for public sector marketing. Joe’s hardware cannot use the logo or the tagline in their marketing efforts. However, if Joe wants to promote “green innovation” there’s no problem since it reinforces the brand. This use should actually be encouraged; however, the BLT marketing committee should approve it.

The bottom line –You will be far more effective as one unified voice than a bunch of independent individual voices. That’s the power of branding. The more you have to offer, collectively, the further people will travel, the longer they will stay and the more often they’ll come back. This applies to your marketing as well as to the business mix in downtown Okotoks.



## 15. Adopt a new name for downtown Okotoks

**Timeline:** Fall 2016

**Who Takes the Lead:** Brand Leadership Team, downtown merchants

**Approximate cost:** None

**Possible funding source:** None

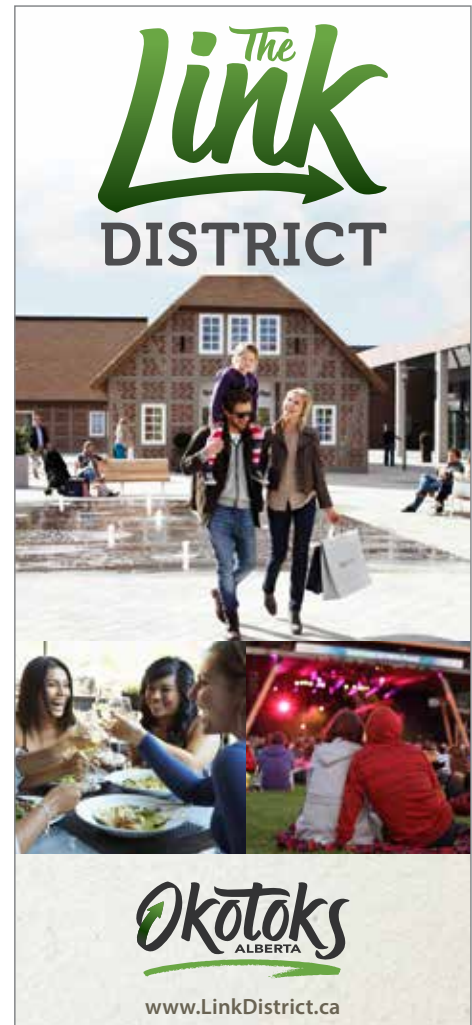
**Rationale and/or details:** Nearly every successful downtown will have a district with a destination name. Currently Okotoks is using “Olde Towne”, but that does not fit with the new brand. The word “downtown” or “central business district” is a geographic designation, not a destination. The idea is that your wayfinding system, when developed, will identify attractions more than just geographic designations. The French Quarter in New Orleans sounds like an attraction, whereas “Historic downtown New Orleans” sounds like a geographic area.

During the Branding Initiative Presentation by Roger Brooks in January, 2016, a possible new name for the downtown was suggested. The name “Link District” comes from the brand promise “Energized by the environment and innovation through creative, active & connected living.” It reflects the intersection of innovation and creativity in Okotoks. This is where people link and connect.

Use this name for the revitalized downtown complete with a planned plaza and pavilion that makes downtown a destination. You might not heavily promote it for a year or two until you can deliver on the promise of actually becoming a destination, but it provides some incentive to help push downtown forward.

The graphic design firm can develop an identity for it, and in a year or so you can develop pole banners (once the market opens), gateway signage, and the “Link District” name will be placed on your wayfinding signage.

Present the name to the Town Council for their approval (NOT for their editing!)



## 16. Implement a curb appeal program on Elizabeth Street

**Timeline:** Fall 2016, ongoing

**Who takes the lead:** Plan Manager, downtown proprietors

**Approximate cost:** \$10,000 per year

**Possible funding idea:** Downtown CRL proceeds

**Rationale and/or details:** Fact - Women account for 80% of all consumer spending. They are usually the shoppers, so if you provide benches and seating areas for kids and husbands/significant others, the shoppers will be free to spend more time downtown. Downtown Okotoks should have benches in front of almost every business. Benches should be placed against the façade facing out, and each should be flanked with a terracotta pot or planter. Benches should be inviting – do not buy concrete or “vandal proof” benches. Yes, they can be bolted down, but they should be something you would want to sit on.

Remember, proprietors should be responsible for beautification next to their buildings, while the municipality should take care of the curbside beautification.





Consider selling “sponsored” benches. In the top rail along the back you can have the name of a person, family or business engraved. Shy away from selling plaques or advertising on the benches. Engraving the name of the sponsor is tactful and attractive.

In the earlier 2014 assessment process conducted by Roger Brooks International, among a number of suggestions that were made, some had to do with cleanliness of public spaces and beautification initiatives. These suggestions have been provided with more specific ideas and direction, and included here as recommendations. For example: this one, #16 – Curb Appeal, #48 – Street Trees; and #52 – Decorative Street Crossings.

While some merchants do a good job with beautification, the large majority does little or nothing to pull customers in the door. Consider the following type of program:

- Collect perhaps \$5,000 from local businesses (\$200 x 25 businesses).
- Contact regional nurseries and wholesalers toward the end of the season (September, October, early November) and see if they have a leftover inventory of terracotta, glazed pots and planters. The minimum size should be 60 cm across the top opening. This way, once they are planted, they are too heavy to be stolen. The idea is to obtain, at cost (or below cost), perhaps 100 pots and planters. They do not have to be all the same. In fact, you want a variety of them. You’ll clean out their inventory in exchange for a great deal. Avoid aggregate and cement pots unless they are colourized.
- Rent a truck or get a volunteer trucker to bring the pots/planters back to Okotoks, where they will be put in storage over the winter months.
- In April of 2017, bring all the pots downtown, close off a block or a side street, and put them all out. Have merchants select pots for their storefronts. When the project is done there should be a potted plant every meter all along Elizabeth Street.

- Have a local nursery deliver 15 yards (or whatever it will take to fill the pots) of potting soil (not just top soil), along with a yard of pea gravel or round stones. Also get a couple of rolls of landscape fabric. Have the soil dumped on the side street.
- Then bring in the high school, boy and girl scouts – every youth organization that is looking to raise money, and pay them to help disburse the pots, put in 5 cm of gravel at the bottom of each, put landscape fabric over the gravel, and then fill the pots with soil up to about 10 cm below the rim. Kids can bring wheelbarrows with them. Perhaps 15% of the \$5,000 would be donated to their organizations. The reason for having the youth take part in this project is that it includes them in the revitalization of downtown Okotoks and creates a feeling of ownership. When kids feel ownership, the likelihood of vandalism decreases dramatically.
- The final phase is to collectively pool money to purchase evergreen (two thirds of your plantings), perennial colour (10%) and annual colour (20%). Have the students then plant them, working with the merchants. Remember that you don't want a cookie-cutter "everything looks the same" approach. You want it to be organic to the business, but still stunning.

Maintenance: You can ask the merchants to take care of the plants in front of their shops, but in our experience, only about half will actually maintain them. Instead, consider the following:

- See if you can get someone (the town, golf course, home owner, farmer) to donate a small John Deere or similar ATV or small riding tractor. Then you can buy a 300-gallon tank trailer that can be filled with water and fertilizer. Consult a master gardener on the best fertilizer to use.
- Approach Kiwanis, Rotary and other local clubs and organizations to set up a watering schedule. These are volunteers that agree to go out each Monday, Wednesday, and Friday during the growing season (hopefully May through September) and once every two weeks the rest of the year (remember that most of the plants are evergreen, and when under awnings or roof overhangs, still need to be watered).
- This can actually be a fun project. The tank sprayer has a small electric motor and a long coiled hose to make watering the plants easy. Every town official and staff person might take one morning during the season, as would local organizational directors, schoolteachers, even students and student organizations. Kiwanis might have volunteers, and often retirees will be happy to join the watering schedule.
- Finally, bring in the local gardening club, or Master Gardeners who can help maintain the pots and will even volunteer to do decorative plantings and arrangements. Master Gardeners, to keep their titles, donate hours each year to community-based public gardening projects. This is an ideal opportunity for them.

Vandalism: It may happen. You will want to have perhaps 20 pots in storage so that when it happens, the pot is replaced the next day. Don't give up. After a pot is replaced several times, the vandals simply give up. It's a battle they can't win.

Once again, nothing promotes a welcoming feeling as much as beautification. And retail beautification can increase sales by nearly a third. Women are attracted to places that feel safe and welcoming, and this is what retail beautification portrays.

There are three statistics to remember as you beautify downtown Okotoks:

- a. Seventy-percent of first time sales at restaurants, retail shops, wineries, lodging facilities, and golf courses comes from curb appeal. We all travel. Have you ever uttered these words: "That looks like a good place to eat"? We all do. We judge the book by the cover.
- b. Eighty-percent of consumer retail spending is by women.
- c. Seventy-percent of all retail consumer spending takes place after 6:00 pm. Are you open?

## 17. Add branding to your monthly e-newsletter

**Timeline:** Fall 2016 – ongoing

**Who takes the lead:** Plan Manager and Downtown Tourism Marketer

**Approximate cost:** Staff time

**Possible funding idea:** None required if using inside staff

**Rationale and/or details:** Nothing creates top of mind awareness like constant reminders. And the most unobtrusive reminder can be in the form of a monthly e-newsletter. BUT it can't be a sales pitch. It should be short, to the point, and offer upcoming events and tips and tricks on how to experience the creativity, festivity and recreation of Okotoks. It should showcase "Coming up this month..." and tips, tricks, ideas that will help residents – and visitors – live more creative and fuller lives.

Whenever possible tell stories: A great hiking experience. Learning how to rock climb. Spending time downtown at the plaza, park and restaurants. Feature new businesses, concentrating on the owner's story. Make it fun, engaging, and use lots of photography or even short one-minute videos.

Provide things to do, not just stuff to read. Make it engaging. Tell everyone you know to subscribe. Wouldn't it be great to get subscribers from all over the province? You can if you make the e-newsletter shine in terms of content and reasons to visit.

In each newsletter include five or six "articles," but all you're going to include is the headline and the first sentence or two plus a link to see the rest of the article on your website – much like scanning down a list of e-mails. This way someone can quickly scan down the list, and if something catches their eye, they can click on the link, taking them to the website and the rest of the story. If they don't see anything interesting, they can just delete the e-mail, BUT it still created "top of mind awareness" – reminding the reader that Okotoks is a great place to spend their time.

Subscribe to other tourism-based e-newsletters to see how they look and sound. Follow your own intuition. Asheville, North Carolina is a good one to use as a model.

Use Constant Contact as a great, inexpensive database to work from. Each month consider the following:

- A great tip, trick or idea that you can do yourself. Celebrate food with a recipe one month, a great book to read, tips and tricks for living a happier, healthier life.
- A great small-business opportunity.
- Incredible events coming up in the next 60 days.
- The latest video that evokes emotion and makes us want to visit downtown Okotoks now – a call to action.

Make it super easy to subscribe by having a sign-up space on your home page. The folks at Constant Contact (should you use them for your e-mail database) have personnel that will, free of charge, help you set up and utilize your database program, which is very inexpensive and increasingly powerful. Once you get your downtown Wi-Fi set up, make it easy for visitors to join the e-newsletter from their smartphone.

## 18. Add Okotoks businesses to GPS services, web-based applications; make corrections

**Timeline:** Fall 2016 and ongoing

**Who takes the lead:** Downtown Tourism Marketer

**Approximate cost:** Staff time

**Possible funding idea:** None

**Rationale and/or details:** Today's consumer relies heavily on web-based applications to find the location of retail goods and services, particularly in rural areas. The appearance of Okotoks businesses on these web-based applications and GPS services improves the likelihood that they will be found and navigated to, thereby increasing the awareness of Okotoks as a consumer destination.

Okotoks businesses should add or update their information on a variety of applications:

**NAVTEQ:** [mapreporter.navteq.com](http://mapreporter.navteq.com) – This service partners with third-party companies to provide its location services for portable GPS devices made by Garmin, Lowrance and NDrive. Many in-dash navigation car systems upgrade their maps from this source. Navteq also supports web-based applications like Yahoo! Maps, Bing Maps, Nokia Maps, and MapQuest.

**TELE ATLAS:** [mapfeedback.teleatlas.com](http://mapfeedback.teleatlas.com) – This company supplies map information to Tom Tom and Apple's IOS 6 maps.

**GOOGLE MAPS:** [google.com/placesforbusiness](http://google.com/placesforbusiness) – Google provides maps for its own system.

Another marketing tool that businesses should take advantage of is being listed on TripAdvisor.com and Yelp.com. Either the business or the consumer can do this. For example, businesses may want to buy a listing or page on TripAdvisor. Another way is to have consumers complete reviews of businesses on these sites. Businesses should make sure they show up when consumers look for "dining in Okotoks" or "shops in Okotoks". The travel marketer should monitor the sites monthly and address any negative reviews with follow up action. When a merchant or lodging facility responds to a negative review in a positive, helpful, constructive way, it shows the readers that the merchant cares and is making things better. This can go a long way to alleviate the negative effects of a bad review. Some area businesses already have a presence on these sites. The shop managers should review them, make sure they are up to date and accurate, and address any concerns expressed by viewers.

## 19. Design, print and distribute "The Very Best of Okotoks" rack brochure

**Timeline:** Fall 2016

**Who takes the lead:** BLT, Downtown Tourism Marketer

**Approximate cost:** \$17,000 – split 50/50 with featured businesses

**Possible funding idea:** Downtown retailers and business owners

**Rationale and/or details:** This is different from the "Top 10 things to do in Okotoks" that appears in the Visitors Guide. It has specific criteria for inclusion on the list and is a brochure.

Always promote your "anchor tenants." These are businesses and activities that people would drive 45 minutes to an hour, or more, to visit specifically. You cannot let politics, or membership get in the way of promoting your "best of" attractions, so this is a job for the BLT and the downtown marketer, not the Chamber or other membership organizations. The reasons for creating this brochure are many:

- The most asked question at any hotel, B&B or visitor information centre is "where's a good place to eat?" and visitors don't want to be handed a list. By promoting your best restaurants, retail shops and activities, you ensure a good experience,



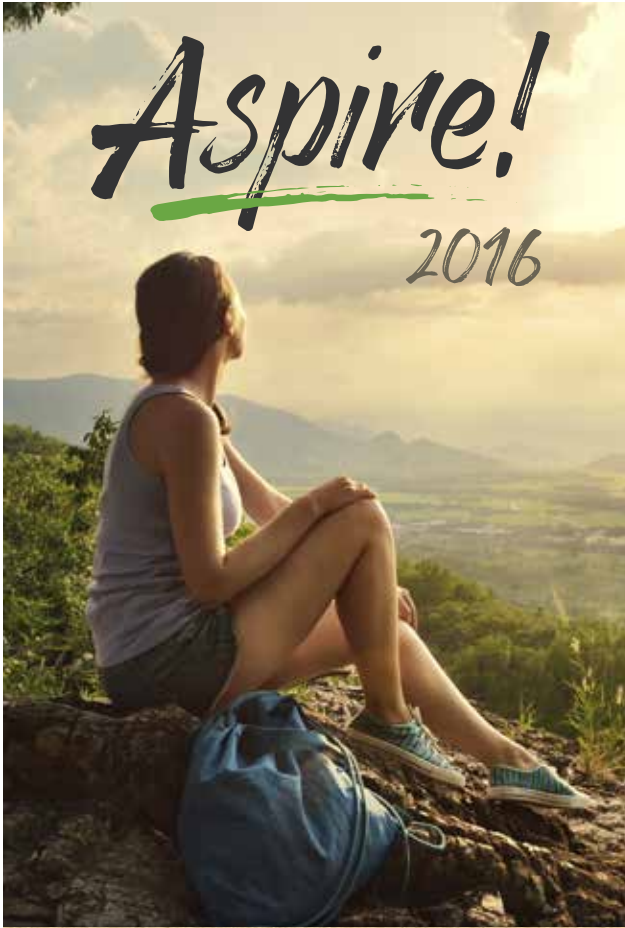
which is often instantly noted on Facebook, in Twitter posts and in on-line reviews such as Yelp and TripAdvisor. If friends or family were visiting you, where would you take them to eat?

- Success breeds success. No successful mall was ever developed until the anchor tenants were committed. And most people go to the malls, not because there's a Hallmark store, GNC Nutrition outlet, or a dozen cell phone dealers, but for the anchor tenants. Chances are good they'll stop into Hallmark or a number of other smaller shops while they're at the mall. The anchor tenants attract the shoppers to the mall, and all the other shops benefit as well. Would you go to Orlando if Disney World weren't there? If you said no, you just insulted 171 other attractions. But they all know that Disney is the anchor tenant and does the heavy lifting in terms of promotion, and they all benefit from Disney being there. Additionally, Disney is glad Universal Studios, Wild Kingdom and the other attractions are there because, collectively, they make Orlando worth a trip from just about anywhere on earth.
- By promoting your very best restaurants, retail shops and activities, you encourage the others to improve so they can be included in future "Very Best of" guides, which should be reexamined and produced new each year. Note the criteria below, and encourage those not selected to work on those criteria so they too can be promoted in the guide.
- One of your recruitment objectives is to have five or six retail, dining and activity anchor tenants in downtown Okotoks. Just like malls, few downtowns become successful destinations without those anchor tenants. You need to encourage existing businesses to raise the bar, or recruit them, and then make sure you help market them, specifically, creating an incentive for them to invest in Okotoks, and specifically downtown.

The "Very Best of" guide is a 4-inch x 9-inch rack brochure that can include up to 20 businesses and activities, and is typically made up of 24 panels (12 panels per side). It should include perhaps 12 to 20 businesses and activities, plus front and back cover, a panel explaining how these were chosen, and a panel that talks about Okotoks, its location, and what the town is all about (Your brand promise).

Here are the criteria you might use to determine who should be invited as a participant:

- a. They must be open at least six days a week. The day they can be closed is Monday.
- b. They must be open until at least 8:00 pm all six nights. As an FYI, 75% of all consumer retail spending now takes place after 6:00 pm. This is why all successful malls are typically open until 9:00 or 10:00 pm seven days a week.
- c. They must have good curb appeal. They must be inviting.



*The very best in food,  
shopping and activities.*

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ALBERTA

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- d. They must be highly regarded by someone other than themselves. This means that they must have 80%+ positive reviews on TripAdvisor, Yelp, Urban Spoon and/or have been written up in regional publications such as Canada Living, Avenue, or similar magazines.
- e. They must be organic to the Okotoks area. This means you can't include franchises and businesses that can be found in just about every town. Why drive to Okotoks if I can enjoy the same shop or restaurant right here in Calgary?
- f. They do not all need to be located in downtown Okotoks. While we hope they can be recruited to downtown Okotoks, it's not a requirement to be included in the guide.

These business folks are each invited to purchase a panel in the guide, making this a public-private marketing partnership. Typically each business or activity would pay in the range of \$400 for a panel. The downtown marketing budget covers the remainder of the cost. Many activities, such as recreational or historical attractions and parks have little or no marketing budgets, and if they make it, their panel would be covered by other funds.

It's very important NOT to include businesses just to sell more panels. You should have a good balance between restaurants, retail shops, and activities: Perhaps six of each. But if you only have four restaurants that are truly outstanding (remember you MUST deliver on the promise of it being worth an hour's drive) only promote four. The same goes with retail shops and activities.

We recommend printing at least 15,000 copies and distributing them as follows:

- Every hotel and motel should put the "The Very Best of Okotoks" guide in every room or have them available at the front desk. Housekeeping would make sure one is in each room. Guests, of course, are encouraged to keep the copy they pick up. An alternative would be to hand one to the guest on check-in.
- In your visitor information centre or mobile VIC booth, Marketing, Promotion and Services office, and at visitor information kiosks designed and installed as part of your wayfinding system. You should have kiosks at the pavilion, the golf course, the airport, and at park kiosks. All should include brochure distribution where the "The Very Best of Okotoks" guide is included.
- One should be sent to every household in the greater Okotoks area, in a #10 envelope (yes, snail mail) with a small card that reads, "The number one reason people travel is to visit friends and family. We hope that you will hang onto this brochure so that when you host visitors, you will show them the very best of what Okotoks has to offer. After all, every dining room table should be a concierge desk."
- At other highway info centres within an hour's drive of Okotoks.
- At Town Hall, the local library and at other public assembly spaces.

This one brochure is a good way to entice regional visitors to stop in Okotoks, a great way to encourage guests to explore downtown, and a good way to educate locals about what you've got and where it's located.

For each featured business, include a photo (interiors sell the experience better than exterior shots), their logo, address, phone number, website address and a description of why they are so good and are a "must visit" and "worth the drive" destination. Be specific about some feature, dish or experience that makes it special. Each would get a full panel. You might consider adding a QR code next to the logo or at the bottom of each panel where a person could easily pull up their website or menu.

The guide should also be available on the Okotoks website splash page for viewing and for download.

Finally, the reason no lodging facilities are included is so that hotels and motels will hand the brochure to visitors without fear of promoting their competitors.



## 20. Design, print, frame and distribute brand awareness posters

**Timeline:** Fall 2016

**Who takes the lead:** Brand Leadership Team (BLT)

**Approximate cost:** \$5,500

**Possible funding idea:** A project of the Chamber of Commerce or service organization

**Rationale and/or details:** This would be a series of posters that would be mounted, framed and displayed at local retailers, restaurants, hotels, town buildings, library, schools, colleges, and other public places, to promote the brand. Consider asking local artists to submit concepts and then hire one or more of them to execute the posters.

Create an initial series of three or four posters and make them 24" x 36" (movie poster size), print 50 of each, have them matted, mounted and framed. These will begin to inform the town residents about Okotoks' brand. These are a fantastic way to cement "ownership" of the brand. After all, brands are about ownership.





The focus of the posters:

- The plaza, pavilion and downtown lifestyle
- Fusion of Creativity and Innovation
- Active lifestyle, Recreation
- Balanced living – work and play
- Local “green” and environmental innovation

Once you have them framed, distribute and offer to hang the posters in town offices, the library, in every organizational office, hotel meeting rooms and lobby areas, at restaurants, at the schools, in local banks – everywhere you can. This will spread the word and create additional buy-in for the brand direction.

The posters should be “collectibles” with strong imagery, and each year a new poster would be developed and added to the collection. After a couple of years, people will purchase the posters to add them to their “This is how we love life in Okotoks” collection.

The reason for actually taking the time and expense of framing, mounting and matting them is to make sure they do get hung in key locations. Handing someone a rolled up poster they can hang at their convenience will result in a lot of posters sitting

in back rooms to be put up when or if they have time. Make it easy, and you'll see it happen. This is a big part of your outreach efforts.

Make sure you offer to hang the posters for those willing to put them up! And put them up in series – with perhaps 15 cm between each frame. Places that should have the posters hung include:

- Library
- Town Hall (and other town facilities)
- Local schools
- Corporate offices (major employers)
- Provincial offices
- Restaurants
- Hotels
- Retail spaces (where there is wall space at or near entrances)
- Even in empty storefront windows to create interest
- The hospital
- Sports facilities and other public assembly spaces
- On visitor information kiosks
- The airport

NOTE: Brands start within – with local knowledge and support. It's imperative that local residents and businesses know what Okotoks is all about.

## **21. Contract for a Design, Programming & Business Plan for the plaza and pavilion**

**Timeline:** Fall 2016

**Who takes the lead:** Brand Leadership Team, Economic Development Services

**Approximate cost:** \$70,000

**Possible funding idea:** Community Revitalization Levy funds

**Rationale and/or details:** The downtown plaza and market/pavilion complex is the cornerstone project and will be the “anchor tenant” for the revitalization of downtown Okotoks, turning it from a shopping and dining street into a thriving destination for Okotoks residents as well as residents of the surrounding region. The timing of this task is to move quickly on previously acquired property options before they expire.

The purpose of the plaza/pavilion is to consistently bring people downtown 250 to 300 days a year. When this happens, more merchants will relocate downtown and property owners will invest there because they will be able to increase their rental/ lease rates. Merchants will be willing to pay more because there will be hundreds of customers outside their doors three hundred days of the year.

There is NO project the town can invest in that will have a greater return on investment than a programmed plaza and indoor pavilion – making it a year round destination.

The plaza/pavilion will:

- Reduce the leakage of locally earned money to neighbouring communities.
- Increase property values downtown.
- Provide a central gathering place for residents of Okotoks, regardless of socio-economic status.
- Help existing businesses downtown become more successful.
- Help “re-orchestrate” the business mix downtown to that of “destination retail,” dining and entertainment, which will attract more people.
- Make downtown Okotoks a showcase downtown in the Province, and beyond.
- Encourage outside investment and reinvestment in downtown, attracting additional dining establishments, brand related, “green” consumables, additional culture and arts, and destination retail shops.

But prior to the plaza and pavilion development, a Design, Programming & Business Plan must be developed. This will answer the following questions:

- Who will own it (most likely the town)
- Who will manage it? Staffing? Job descriptions?
- How will it be managed – who will do what, and what are the roles of the various local organizations and the town in its management?
- What will be the requirements of the operating entity (Main Street Program or other)?
- How will the plaza/pavilion generate revenues?
- Will subsidies be necessary and how much? How often?
- What kind of “start-up” costs will be required and where will that funding come from?
- What specific kinds of activities will take place on the plaza or in the pavilion?
- How, exactly, will it be programmed 250 to 300 days a year?
- What about weather considerations?
- What specific infrastructure elements will be required to host these activities?
- Based on activities and infrastructure requirements, how much will it cost to build the plaza/pavilion?
  - This means that a detailed site plan will need to be developed – the next step after the initial concept renderings. These will not be construction drawings, but will provide enough detail for that next step.
- How will the development be funded?
- What needs to be done by the private sector, to “front” buildings onto the plaza?
- What should be the retail mix around the plaza?
- When could the partnering year-round covered pavilion be developed?
  - Should they be developed together as a single project?
  - If not, what is the long-term plan?
  - At what cost?

- How does the plaza and pavilion impact and benefit the other downtown streets?
- Could the plaza development be phased? If so, how?
- What are the timelines and funding milestones in its development?

In essence, the Design, Programming & Business Plan will provide the roadmap to:

- Programming: what specific activities will take place on the site at least 250 days, growing to 300+ days a year;
- Development: how and when the plaza will be developed, including possible phasing and funding; and,
- Management: who will manage it, how will they be funded, and what will their responsibilities be to the town (should it own the plaza or pavilion).

Of all the recommendations being made in this plan, this is one of the most important, because it actually “monetizes” and provides a return on investment for the millions of dollars the Town of Okotoks will invest in downtown.

To make this happen, consider issuing a Request for Qualifications for this work, or contracting directly with an entity that has this expertise. Typically, we avoid architectural firms at this stage and suggest using urban planning expertise with experience in creating public assembly spaces. Remember that programming is the key to the plaza, not the design. This is about people, not creating just another public space.

## YEAR 2017

### 22. Redevelop and expand the vehicular wayfinding system and add pedestrian wayfinding downtown

**Timeline:** Spring 2017

**Who takes the lead:** Design: Brand Leadership Team. Fabrication and installation: Town of Okotoks

**Approximate cost:** \$70,000 for design and fabrication specifications. \$200,000+ for fabrication and installation

**Possible funding idea:** Community Revitalization Levy

**Rationale and/or details:** The present wayfinding system is inadequate and needs improvements and expansion. Most of the signs along the road are far too small to read while driving. Visibility and ease of readability are key. Issue a Request for Qualifications for professional wayfinding expertise. Wayfinding is about “environmental graphics” and is substantially different than “institutional wayfinding” as you might find in a hospital, college campus or mall. This is part marketing, part branding, part traffic mitigation, and is as much a science as it is an art. Only hire professionals with expertise in developing systems like this.

A typical wayfinding system includes the following elements:

- Vehicular directional signage on freeways, highways, primary thoroughfares, and community surface streets. It must include attractions, amenities, and local services.
- Pedestrian wayfinding in the downtown core area, which includes panels showing specific attractions and how walking connects them. (RBI can provide examples)
- Amenities wayfinding (public parking, washrooms, reader boards, and visitor information kiosks)
- Redesign of typical street signs including “Do not enter” and “left turn only” and other traffic signs so that they fit the brand. Put them on decorative posts to really make downtown a showcase.



- “More to Explore” signage using Greenville, SC as the example. This will encourage visitors and shoppers to explore side streets and areas other than Elizabeth Street.
- Where there is two-hour parking, include “All day parking” and directional signage to that. Two hour parking is a good way to kill a downtown.
- Marquee or “place identifiers” in front of public buildings, services and parks.
- Community and downtown gateways.
- Visitor information kiosks, with weather resistant brochure distribution, in various locations throughout the community.
- Making sure the wayfinding system uses the international symbols for parking, washrooms and ATM locations.
- Seasonal pole banners. (Spring, Summer, Fall and Winter)

When you issue the RFQ, respondents will not be able to provide a cost since they won’t know the community, nor will they know what you have for a budget. You want to find the best, then pay your top three candidates about \$2,000 each to cover their travel costs for a trip to Okotoks to take a tour and have them visit with Okotoks Public Works as well as the Mayor and the BLT. Have them describe their methodology, show you their work as it is installed elsewhere, and then send you a price – or have them tell you what they can do for the amount of money you assign to this project.

Once they’ve visited, they will be able to provide you with a detailed scope of work, methodology and timeline. Then select the one whose methodology, timeline and cost works best for the city.

Once you’ve made your selection, you want to make sure the final product includes bid-ready construction drawings, approximate fabrication and installation costs, and have the system designed to a pre-determined fabrication/installation budget. You can have a community gateway fabricated for a million dollars, or a complete wayfinding system installed for





\$250,000. Start with a predetermined budget and have the system designed to that budget – including possible fabrication and installation phasing over a number of years.

It should take about 90 days to design the system.

If the proposing firms offer to manage the bid, fabrication and installation process, seriously consider having them do this. Sign fabricators speak their own language when it comes to materials, colour mixtures and specifications. Some will try to cut corners, and you may end up with a sign that looks very different from the graphic artist's design. Having someone who speaks their language and knows the ropes can keep the fabrication on track and within budget, while maintaining the quality.

View Roger's video entitled "The Art of Wayfinding" in the RBI Video Library and "The 20 Ingredients of an Outstanding Downtown (Part 2)" for more information.

### **23. Enter into a public relations / marketing contract for national coverage**

**Timeline:** (Winter) January 2017

**Who takes the lead:** Downtown Tourism Marketer

**Approximate cost:** \$50,000 annually

**Possible funding idea:** possibly BRZ funds if the district gets established

**Rationale and/or details:** With the brand "Join the innovation!", Okotoks is putting a stake in the ground and claiming a place on the regional stage of great places to live and raise a family. Much of the work recommended in this plan has to do with upgrading and creating the products, services and experiences that will deliver on that brand promise – that Okotoks, Alberta is a special place in the world, and worthy of a visit or even as a place to live and work. Delivery must be consistent and convenient.

Once you get there, you need to tell the world. That requires a sophisticated national (and perhaps international) public relations effort. Why public relations and not advertising? Because brands are about what other people think of you, not what you say about yourself. Public relations is the art of getting others to declare your charms. Third party testimony has far greater credibility than advertising. Traditionally, this happened by inviting travel writers to the destination, hoping that the subsequent magazine article would be flattering.

This method still exists of course, but the advent of the Internet, websites, social media, blogs, and photo sites like Pinterest have completely changed the public relations environment. Ninety percent of travelers search the Internet for information about potential destinations to visit and the majority of those book their trip online. Where do they look? Not destination sites, but third party sites like TripAdvisor and Yelp. They want to see what others are saying about you.

Today's public relations experts understand these new media and the subtleties of shepherding and generating positive third party coverage of destinations. Find and hire a firm that has experience in this new age of destination public relations, in generating the right kind of "buzz" about Okotoks, about managing Facebook sites, social blogs, creating viral coverage and addressing negative coverage. They still should be able to work with traditional travel writers in generating editorial coverage, both print and digital.

In today's electronic environment where most people are addicted to their smartphones, consumer opinions shift quickly. This is a double-edged sword. Brands can gain notoriety quickly, but just as quickly, they can be destroyed. Professional public relations expertise can help guide you through the process, so that you don't promise more than you can deliver at any given time.

## 24. Work with CTV and other television networks to include Okotoks on weather maps

**Timeline:** Winter (January) 2017

**Who takes the lead:** Downtown Tourism Marketer

**Approximate cost:** None (staff time)

**Possible funding idea:** None

**Rationale and/or details:** Work to put Okotoks “on the map” literally on CTV or other weather newscasts. When doing the weather report, area maps include destination communities. We would love to see Okotoks included in these newscasts. This would help create top of mind awareness of Okotoks, and where it’s located. Okotoks, is home to thousands of residents who commute to and from Calgary, and is a large visitor destination from Calgary as well.

## 25. Update the Branding, Development & Marketing Action Plan

**Timeline:** Winter (January-February) 2017

**Who takes the lead:** Brand Leadership Team, Manager, Town of Okotoks

**Approximate cost:** \$20,000

**Possible funding idea:** planning grants, CRL funds, general funds

**Rationale and/or details:** This plan, for the most part, is a three year Action Plan that should be updated to provide Okotoks with a “next steps” plan – where you go, once the initial set of recommendations have been implemented. You won’t need to start over, but just need the next list of to-do items for the next three years. This might include:

- Expanding the downtown development district
- Updating zoning ordinances
- Securing additional financing
- Hotel development in the downtown or in other areas
- Additional marketing and organization
- A detailed marketing, advertising and public relations plan. The vast majority of this plan concentrates on product development, but once the product has been (or is being) developed, it will be time to assemble a detailed marketing program to “tell the world” how great Okotoks is, making the town a fantastic destination for new families, visitors, and new potential business investment.

This is not like a comprehensive plan or even a strategic plan. As an Action Plan, it is fluid and needs to be looked at continually, massaged, and updated. You want to avoid this becoming a plan sitting on a shelf gathering dust. It is your reference and guidebook for the next three years.

It should be reviewed every one or two months and then updated at least once every year. You will add things to it, rearrange things, add case histories or new ideas, and use it to determine budgets. It should be a guidebook for the Town’s comprehensive planning effort.

If you need assistance in updating it, contract with Roger Brooks International or another firm to take a hard look at the recommendations, costs, projects and what’s happened to date, what can be eliminated (already completed recommendations) and what can or should be added to it.

Always review it and update it. The more often you do it, the easier it will be to keep the focus narrow and all of your organizations on the same page.

## 26. Develop an annually updated “Community Profile” brochure and distribute it

**Timeline:** Winter (January-February) 2017

**Who takes the lead:** Okotoks Town of Okotoks, and Downtown Tourism Marketer

**Approximate cost:** \$7,000

**Possible funding idea:** Town of Okotoks

**Rationale and/or details:** Before proceeding with this recommendation, make sure you have excellent professional photography to use and a good copywriter. Create a Community Profile brochure. The profile should be a simple, straightforward snapshot of Okotoks that can be used by local real estate agents (commercial and residential), by the Chamber as part of relocation packets, by Economic Development Services for business recruitment purposes, and by the Main Street Manager and Plaza staff to attract festivals and events, and when you get a downtown hotel – meetings and conventions. It should include demographic information, weather, some history, and economic information. Provide copies to your major employers, hospitals, medical facilities, banks, etc.

Emphasize your points of differentiation with competing communities and use third party testimony as long as it is not older than five years. Economic development examples should focus on the outcome, not just be about assets. Use case studies whenever possible.

Be sure to include approved or installed new features in downtown Okotoks, such as the new plaza and pavilion, public Wi-Fi, new wayfinding signage, programmed event days, awards and designations, industrial utility assets – things that potential retailers, new businesses and future residents will be looking for.

Update the brochure every year and keep it available as multi-page downloads in PDF format on every official website. Consider printing 6,000 copies. Distribute perhaps 25 to every real estate office within a 100-mile radius, and distribute the rest as needed. They should be available in each partnering organization office and at the Town Hall.





## 27. Develop a business and investment “Opportunities” brochure and distribute it

**Timeline:** Winter (January-February) 2017

**Who takes the lead:** Okotoks Town of Okotoks, and Downtown Tourism Marketer

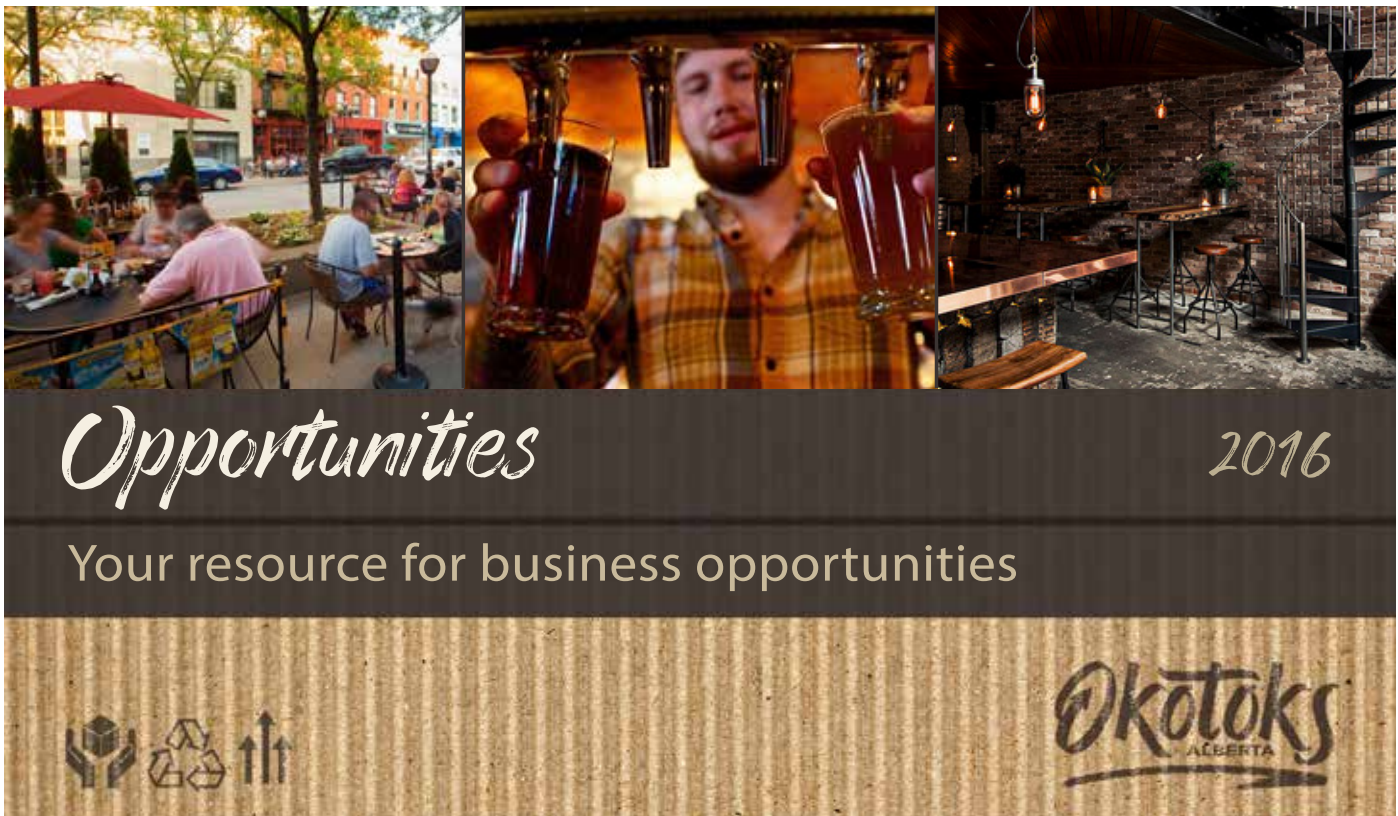
**Approximate cost:** \$7,000

**Possible funding idea:** Town of Okotoks

**Rationale and/or details:** With the “Opportunities” piece, list the top seven retail opportunities for downtown Okotoks. Consider the following:

- Additional restaurants – mid-scale, perhaps ethnic, but family-oriented whenever possible
- Technology and innovation office space (including micro office start up space)
- Professional services building (Class A, small office lease spaces)
- Specialty retail shops
- Specialty food outlets
- Sports and recreation goods store and sporting equipment rentals
- Bike shop (rentals, sales, repairs)
- Tourism-based vendor space

Make sure you concentrate the marketing on WHY Okotoks– not just what you have or where it’s located. WHY should I move or start a business in Okotoks?



## 28. Get your best spokesperson on film

**Timeline:** Spring 2017

**Who takes the lead:** BLT, Downtown Tourism Marketer

**Approximate cost:** \$3,500

**Possible funding idea:** Grants

**Rationale and/or details:** Find the most enthusiastic, fun-loving, engaging and humorous person you have and put them on film. They don't have to be professional broadcasters or television personalities, but they DO need to be totally sold on Okotoks and be ultra-enthusiastic about spending time in the town.

You don't need to hire a professional film crew, but you do need some production and editing skills to fine-tune the video segments. You should add three short videos every month to the website. These might include an hour of filming, which will be edited down to one, two or three minute videos, each selling the following:

- Business opportunities in Okotoks
- The “up and coming” energy for downtown with a focus on the new plaza, the market pavilion, a new revitalized mix of businesses with sidewalk dining, including seasons, and a town alive with activities at least 250 days a year
- The innovation and creativity businesses in town

For inspiration, take a look at these two guys, who both do an excellent job:

- Eric Hastings of Hastings Travel. Check out some of his videos at [www.youtube.com/user/HastingsTravel](http://www.youtube.com/user/HastingsTravel). Look through some of the videos and make note of which ones made you want to go visit.
- Brad Rowen is an Idaho native who has worked in the travel industry for a long time and was the featured host of Idaho Tourism's “Adventures in Living” program. You can find information about Brad at [www.geocities.com/bradrowen/index.html](http://www.geocities.com/bradrowen/index.html). Check out Brad at [www.greatidahogetaway.org](http://www.greatidahogetaway.org).

By watching Brad or Eric you can get an idea of the type of fun and humor you are looking for. No elevator music videos! Your videos should be very fun, engaging, fast paced, and exciting.

## 29. Purchase two mobile visitor information centres

**Timeline:** Spring 2017

**Who takes the lead:** Plan Manager and Downtown Tourism Marketer

**Approximate cost:** \$1,000 - \$10,000

**Possible funding idea:** Rotary, Kiwanis, State tourism promotion grant

**Rationale and/or details:** The entire purpose of the Branding Initiative is to generate more spending in Okotoks. Accommodating the psychology and behavior of tourists plays a large part in facilitating visitor spending. Only about 5% of visitors ever go to a visitor information centre (VIC). If visitors are already downtown they will be out of their cars in the midst of a concentration of retail and dining options. This will improve visitor spending as they are immediately surrounded with spending options in a pedestrian setting.

But what about those at the ballpark or BMX track, or the Recreation Centre? Or those who only go to the high school to watch a game? A trend in the destination tourism industry is the deployment of mobile visitor information centres. A recent study of 850 destination marketing organizations (DMOs) shows that 25% of DMOs have mobile visitor information centres (VICs), and 50% of those are in very high pedestrian traffic areas. (It should be 100%!) Why? Overall numbers of visitors going

to traditional VICs are declining even as the total number of visitors is growing. Many of these traditional VICs are placed outside of high spending areas, along highways, or other places where visitors have to get back in their cars and drive somewhere else to be at the centre of things. Visitors might just keep driving and not come back. The real payback on investment for VICs is serving visitors.

Put your mobile VICs when and where the crowds are – the events in parks, high school sporting events, the heavy shopping days. It should be designed for the pedestrian visitor who has already parked and is looking for things to do. Make it fun. Use a small airstream trailer, and convert it into a workable space for an information specialist, brochures, maybe even branded/logo merchandise you sell to help defray the cost of the VIC. Or buy smaller ones that you can set up and dismantle.



Printed brochures are important at this stage of a visitor's trip. Before traveling, the Internet rules as the "go-to" place for travel information, but brochures are the most important resource once the visitor arrives in the destination. Visitors don't want to take notes; they want the physical brochure they can read on the street or in the car. Once on the road, 81% of visitor decisions come from brochures.

Move the mobile VICs where and when they are needed. Two or three people should staff each one. In fact, town council and staff people should consider a four-hour shift once a month to put them in touch with Okotoks' visitors. If you can't afford to staff it, make an agreement with a private business or a service organization, and let them sell their wares while at the same time providing visitor information. This might be different for different seasons: hot chocolate in the winter, ice tea in the summer. We recommend that you watch Roger Brooks' "Visitor Information Centres & Services in the Digital Age" video in the RBI Video Library.

### 30. Contract for downtown business recruitment

**Timeline:** Spring 2017 – ongoing

**Who takes the lead:** Town of Okotoks

**Approximate cost:** \$70,000 - \$100,000 a year for up to three years

**Possible funding idea:** grants, general funds, BRZ funds if the district is developed

**Rationale and/or details:** Contract for professional commercial real estate expertise to attract specific businesses into downtown properties, and to encourage redevelopment and new development of needed projects into downtown Okotoks.

As noted throughout these recommendations, all branding efforts are built on product, not just marketing. In order for downtown Okotoks to become one of the Canada's best destination downtowns, a solid recruitment effort is needed.



Here is the business mix you want to have in downtown Okotoks (including existing businesses):

- 30 restaurants. That's right – 30. The more you have, the further people will come, the longer they will stay and the more often they will come back. In cities across North America with outstanding and successful downtowns and populations very similar to that of Okotoks, you will see between 20 and 30 restaurants and food service establishments downtown.
- A recreational clothing and gear store (running and hiking gear, camping and fishing gear, boots, and other sports and recreational equipment)
- A first-class bakery downtown (breads, pastries, pies, cakes, cookies). This can be included as one of the restaurants should they serve lunches or even breakfast items.
- A flagship upscale downtown boutique hotel
- Technology live/work space
- Class A professional office building: tenants may include technology businesses, small professional service businesses (accounting, tax, law firms, architects, engineers, etc.) with leased spaces of 45 square meters on up to perhaps 375 square meters. If these are facing Elizabeth Street, the ground floor should be retail space, not offices.
- Two full-service day spas – not just a hair salon. A real spa.
- Full service bike shop: rentals, sales, and repair.
- 6+ galleries with rotating exhibits, art shows, artisans in action events.
- 6 showrooms of “green” applications for the consumer – bathrooms, solar, recycling, air conditioning, etc.
- A wine store with pairing and foodie events would be a major draw to downtown.
- Upper story residential development. People are moving into downtowns more than ever before, particularly around plazas and public assembly spaces.
- Specialty shops:
  - Antiques (not second hand stores, but ones that concentrate on home furniture and decor).
  - Introductory hands-on artisan studios, like a paint your own pottery shop.
  - Ice creamery or, better yet, homemade gelato.
  - Kid-focused retailers – game shops, a robotics event store.
  - Home accents and decorating stores.
  - Quilt shop. Make sure quilting is the primary focus, more than just fabrics. This niche market draws a big audience that will travel quite a distance. The shop should also offer classes and beginner kits.
  - Butcher shop (these are coming back and are VERY popular). This could be combined with a gourmet foods and gifts shop. Think wine, cheese, meats and a mix of prepared and raw foods. This would be an amazing partner with your full-service bakery.
  - Office supply and stationery/card store. Not a big box (Staples, Office Max) but one that has ultra-personal service and can serve the town, county and other professional services.
  - A kitchen/culinary store with a studio kitchen for classes.
  - A shoe store. Check out Brown's Shoes, a chain that is moving into rural and suburban downtown cores across the country with great success.

This list includes nearly 25 “new” retailers, not including upper level development of condominiums, apartments and office space.

Effective recruitment requires not just outreach, but handholding from the sales pitch all the way past opening the doors. As noted previously, over his career, Roger Brooks recruited more than \$3 billion in new construction projects into rural communities and resorts. The total cost of advertising over his career: \$60. Successful recruitment is a one-on-one process. You find the business you want and then court them, working with them through the feasibility testing, financing, permitting, right up to the opening of their doors. And even then, you continue to work with them to help make them successful.

You start with a “Ten Most Wanted” list and then recruit right down that list. As one is recruited you add another to the list.

The initial efforts are geared to quality of life businesses – not factories and industry. If Okotoks becomes one of the state’s best places to live, then industry will follow. For the first time in North American history, quality of life is the leading relocation and new business development lure. This means having an extraordinary downtown fitting the 10+10+10 Rule, a signature plaza area, a vibrant year-round public market, and other supporting businesses that can elevate Okotoks’ brand.

Typically this recruiting position is a three year contract that is reviewed at the end of each year and then renewed if things are going as expected. The idea is to have this person work themselves out of a job. Consider contracting with someone with a commercial real estate background: perhaps a CCIM (Certified Commercial Investment Member) Realtor that is winding down, or looking for a way to supplement his or her income with a non-commission position.

Before you contract for this position we urge you to watch the Roger Brooks video “Recruiting Tourism Development Projects.” While this video concentrates on tourism, the principles detailed in the video apply to downtown retail recruitment. This will be a terrific guide on how to find the right person and how to successfully recruit new businesses into downtown Okotoks.

As part of this recruitment effort, it will be VERY important that landlords include in lease agreements operating hours and days. Seventy percent of all retail shopping takes place after 6:00 pm. Downtown cannot succeed if most of the shops close at 5:00 or 6:00 pm and are closed on weekends, when most shopping takes place.

The plaza will be programmed with activities at least 250 days a year, and the majority of the activities will take place from 4:00 pm to 9:00 pm six nights a week (Sunday is an early close day).

### **31. Work with property owners on creating a “new technologies in the home” marketplace**

**Timeline:** Summer 2017

**Who takes the lead:** Plan Manager, Downtown Tourism Marketer, business recruiter

**Approximate cost:** none (staff time)

**Possible funding idea:** none

**Rationale and/or details:** A big part of the Okotoks brand is innovation, technology, education, environment, arts, health and wellness. The retail in downtown should include a grouping of technology-driven retail stores that sell environmental cutting edge technology applications for the home and business. For example: human powered chargers, water-powered clocks, power generating rocking chairs, wireless appliance managers, electric cars and bikes, large and small solar panels, recycled materials, modular and prefab housing, sustainable building materials, green roofs and living walls, LED and natural light applications, wind power, water conservation and recycling. These are just a few of the many items that should be displayed, demonstrated and sold downtown in support of the brand.

## 32. Rename, rebuild and redesign the Olde Towne Okotoks website (experiences and business opportunities)

**Timeline:** Summer 2017

**Who takes the lead:** Plan Manager and Downtown Tourism Marketer

**Approximate cost:** \$30,000

**Possible funding idea:** Provincial tourism promotion grant, downtown association

**Rationale and/or details:** When it comes to tourism marketing, funding should be allocated as follows:

- 45% on digital marketing: website, social media, e-newsletter, apps, online advertising, pay per click, etc.
- 20% on advertising that will drive people to your website, which must be good enough to close the sale
- 20% on public relations: getting articles and exposure showcasing the brand and your downtown revitalization efforts
- 10% on printed materials (your Best Of and Opportunities guides)
- 5% on trade shows, billboards and other forms of advertising

As you can see by this breakdown, the web should be the very top priority. Most Albertans now have immediate access to the Internet via smart phones, tablets, and computers, and they have this access at home, at work, at school, and while on the road. Of this group, the vast majority use the web to decide where they will visit, what they might want to do this weekend, where to go eat, what to do tonight, where to live, and even where to establish a business. The revitalized downtown Okotoks needs to build a tourism-focused website that will REALLY showcase the brand like no other. It needs to be world-class and professionally produced. It needs to be video and staged photography based, including lots of video content and specifics: It should NOT be a website based on lists of restaurants, retail shops, museums, parks, or local things that will not entice visitors. The website needs to be experienced-based and rich with content.

We are huge proponents of WordPress, where you can make the changes, in house, without the need to pay a Webmaster every time you want to make changes or add to the content. You don't want your website to be a "been there, done that" site. You should invest your money in content, not the delivery system. WordPress has amazing search engine optimization widgets, calendar of events widgets, etc. Most widgets range from free to as high as \$30. You can even create your own online store where people can buy logo gear, posters, art and souvenirs.

Why are we so sold on WordPress? Our own business spent thousands of dollars a year working with our Webmaster every time we wanted or needed a change. With WordPress, we redeveloped our sites internally, without any HTML or web-development expertise, and now we can make updates, add videos, photographs, build a store, include a calendar of events, and more, in just minutes. With the funds we saved, we hired a great videographer – once again, investing our money on content, not the delivery system. Consider bringing in a WordPress professional (there are many) just to show you how to get started.

Work with your graphic design firm to have common elements and a consistent look and feel among the Town of Okotoks website and the new downtown Okotoks website. They do not have to be cookie-cutter or use the same template, but they do need to have complementary and unified colour schemes, fonts or graphic elements. Encourage other destination-related sites like the Chamber, to integrate brand colours and fonts into their websites.

Using one of the URLs identified and purchased during Brand Camp, build a Master Splash page that directs viewers to either the downtown website, or the Town of Okotoks website, This is the URL you want to promote.



Here are a few rules for your new downtown Okotoks website:

- A. Promote specifics not generalities. If you promote downtown as the hub for some of the best entertainment in the area, you **MUST** tell me more:
  - a. Where is the event? Where do I park, and is there a parking fee?
  - b. Is there an admission fee? If so, how much is it? Can I pre-purchase a ticket online?
  - c. Are there places to eat or picnic tables? Can I bring my own food and drinks?
  - d. Are there washrooms nearby?
  - e. What are the days and hours of operation of the event(s)?
  - f. What will I see? What makes this event extra-special?
  - g. The more details you provide the more likely you are to close the sale. Don't just send them to another site and pass off the responsibility to others. Include maps whenever possible and video snippets of prior events.
- B. Avoid lists. If you want to showcase restaurants, include their type of dining: Italian, Mexican, barbecue, etc. and make sure you include a photo (interior please), logo, address, meals served, hours and days they are open, and a description of why they are so great, plus include a link to their menu and website.

- C. This is the age of itineraries. We urge you to watch the Roger Brooks video “The Power of Itineraries,” which showcases dozens of examples and how to craft itineraries.
- D. People LOVE video content – particularly those that run from 30 seconds to no more than three minutes. It’s better to have a number of shorter videos than one long one.
- E. People LOVE photography. Your site should be loaded with photography, and the photos should show people enjoying activities – not just places like parks, ball fields or downtown without a soul in the picture. We relate to people, not just places. Make sure you watch Roger’s video “The Power of Photography to Increase Sales.”
- F. Organize the site by subject. In fact, consider a “pick your season” format where they choose the season, and it takes them to a page that will tell them what to expect that time of year in terms of weather, accommodations and activities. Once on that page they can then “pick your passion,” which will include the various activities available that time of year. The ballpark may be seasonal, but the downtown plaza events will be showcased in every season.
- G. Make it simple and easy to navigate.
- H. Remember that you are selling experiences first, not downtown buildings. People are looking for reasons to believe that Okotoks is the place to live and operate a business. Visitors are looking for things to do, not places to go.
- I. Hire professionals to design your navigation (site map) and your pages, and once you have the basics put together you can work with them to add additional content.

To help you through this process we recommend the BLT, Manager and the Downtown Tourism Director watch the following Roger Brooks videos. Each is about an hour long:

- “Community Marketing on a Minuscule Budget”
- “Seven Deadly Sins of Destination Marketing”
- “The Power of Itineraries”
- “Tourism for the 21st Century”

A good website to emulate is [www.exploreasheville.com](http://www.exploreasheville.com) for Asheville, North Carolina. While they have a very large budget to work with, you can still look at their site and model much of the downtown Okotoks site based on that.

### 33. Create a zoning overlay for the redeveloping area of downtown Okotoks

**Timeline:** Summer 2017

**Who Takes the Lead:** BLT, Town of Okotoks

**Approximate cost:** \$60,000

**Possible Funding Source:** Town of Okotoks, grants

**Rationale and/or details:** One size does not fit all when it comes to commercial zoning, so a separate zoning district needs to be developed for downtown Okotoks.

Downtown is, and should present, an entirely different feeling than other commercial areas. The future of downtown revolves around off-street parking, a pedestrian-friendly intimate setting, and a number of elements that should be set as standards in a downtown zoning overlay. Review your town bylaws for the following items, and update them if needed:

- The size and use of retail blade signs (perpendicular retail signage) This is being implemented.
- The restricted use of plastic and vinyl banners to special sales or event days

- The restricted use and size of sandwich or A-boards to a maximum number of days per year.
- Allowable extension of window displays to exterior spaces on the sidewalk.
- Façade-side beautification, including benches, pots, planters.
- Allowable ground floor uses (retail, restaurants only, with restricted professional services)
- Allowable upper floor uses (lodging, office, residential)
- Restrictions on the number of chains and franchises in the downtown (to keep the downtown authentic to Okotoks).
- Decorative crosswalks where you want to define and encourage pedestrian flow.
- Off-street parking and wayfinding navigation to off-street parking.
- Façade improvements (design guidelines and a loan/grant program)
- Height restrictions for new development projects
- Increased number of non-chain retail and restaurants.

Think of downtown as a mall. This is the way lifestyle retail centres also think; to succeed they must have like businesses grouped together. This is referred to as “clustering,” and this is why gas stations and fast food restaurants for years have “clustered” on all four corners of busy intersections. This is why malls have food courts. And this is what makes dining districts work. Think Branson, Missouri and 49 music theaters. This town of just 6,500 residents hosts 7.5 million visitors a year. Think Napa Valley and its 200+ wineries.

When you visit a successful mall – or lifestyle retail centre – you will never find laundromats, architectural offices, tax preparation services, town offices, or other non-retail businesses there. They know they must orchestrate the business mix.

This doesn’t mean you can’t have an architect’s office, tax preparation services, town offices in the downtown, BUT you must have the necessary “critical mass” of like-businesses grouped together, so you become THE place for local residents and visitors to spend time.

To see a great example of a destination downtown just visit McKinney, Texas which has a great mix of businesses. In the case of Okotoks you need to help orchestrate the effort so you don’t end up with a hodge-podge assortment of businesses that create “retail chaos” and a place that closes at 5:00 pm. This is why cities throughout North America are starting to implement land use designations or zoning ordinances, because so many individual property owners, each with their own agenda, do not work together to create an outstanding destination, which only happens with an orchestrated business mix.

In downtown McKinney you’ll see real estate signs that say “Available for a restaurant” – a specific type of business in a specific building.

Okotoks needs to follow suit. However, it’s important that the town and the landowners work together. If the town imposes “allowable uses” for street level shops, then it’s important that the town be there to help that landowner recruit a business that fits the retail mix – and that is part of this plan.

When existing downtown business space becomes available for sale or lease, then the allowable uses ordinance (bylaw) comes into play. Professional services and non-retail uses would be encouraged in second story locations, and we recommend that a certain percentage of retail frontage still allow for non-retail commercial use. In Conroe, Texas for example, the downtown wraps around a courthouse square, and there’s a proliferation of attorneys downtown. But to make sure their downtown is “alive after five” some law firms have “activated” the first 3 to 5 meters of their building for other uses, with law offices behind that space. The street front space might be home to a small coffee shop, or flower shop, or newspaper stand – retail and food services that can be open into the evening hours, keeping downtown alive and vibrant.



The highest and best use of any commercial properties bordering a central plaza, or on the water, or with view corridors, is always going to be a restaurant, or retail and second story offices for residential, or services like insurance, attorneys, etc.

To support this recommendation we hope you'll watch the Roger Brooks video "Downtown Critical Mass," which showcases case histories and why this is so important.

As the bylaw is being drafted, work with your property owners rather than impose it on them. Most will agree that their investment will realize a much greater return when they work together to orchestrate the business mix in their buildings.

Every restaurant, coffee shop and café should be encouraged to incorporate sidewalk café dining. By ensuring it is easy to get a permit, and making the list of regulations simple and easy to implement, businesses will initiate seasonal sidewalk café dining throughout downtown. Beer and wine should be allowed in sidewalk dining areas.

All businesses should incorporate blade signs, but they need to have some general regulations. We typically recommend that all blade signs be no wider than 100 cm, hang no lower than 2.2 m above the sidewalk, and are no taller than 2.8 m from the sidewalk (meaning the signs can be as tall as 660 cm). They should not be backlit, but lights can be mounted on the façade, lighting up the signage. Signage designs would come before a design review committee for approval. Sandwich boards, or A-boards, might only be used by restaurants that offer daily specials.

You'll want to restrict the usage of plastic and vinyl banners, as they tend to make downtown look cheap and second-hand and take away from the quality architecture. We typically recommend that these only be used for promotions and special deals, only by permit, and only up to two weeks at a time, with a maximum of four times per year, with daily penalties for non-compliance.

Limit the use of sandwich board signs to a maximum number of days per month, and define the size of the "A" boards that are permitted.

Businesses should be encouraged to extend window displays to exterior spaces and use up to 60 cm of the façade-side sidewalk for this purpose. Remember that these are window displays, not folding tables or clothes racks put outside. You would never have these in a display window, so they don't belong outside – except perhaps during a garage sale weekend. A design review committee would police this by issuing friendly reminders of what works and what doesn't.

The Manager should take the lead in providing benches throughout downtown. They should be attractive benches people would actually sit on, should always be placed at the façade facing out, and flanked with planters, pots, or window displays in exterior spaces.

Here are some additional notes and examples regarding the regulation of commercial properties. While you will see Manhattan and instantly think "how can that possibly apply to Okotoks?", remember that these bylaws are for very small neighbourhoods – not for the entire town. In every case you see here, most are smaller geographic areas than you have in Okotoks.

We recommend that the Town, contract with urban planning expertise to help develop some of these new (or revised) bylaws.

### **Restrictive Retail Land Use Designations**

Most commonly seen in highly desirable, affluent neighbourhoods with low vacancies and high rents.

Typical tools:

- Mandated/prohibited uses
- Size caps
- Conditional permitting

- Density guidelines
- Quota system

**Manhattan, NY** [http://www.nyc.gov/html/dcp/html/zone/zh\\_special\\_purp\\_mn.shtml](http://www.nyc.gov/html/dcp/html/zone/zh_special_purp_mn.shtml)

- Special 125th Street District. To ensure active and diverse retail uses, special regulations restrict the amount of ground floor street frontage that may be occupied by banks, office and residential lobbies, and other non-active uses. Also requires inclusion of arts and entertainment uses for developments over a certain size.
- Special Madison Avenue Preservation District. Retail continuity is ensured for the famed specialty shops by mandating that the ground floor of buildings on Madison Avenue must be occupied by selected uses.

**San Francisco, CA** <http://www.sf-planning.org/index.aspx?page=2839> uses formula retail controls to protect San Francisco's vibrant small business sector and create a supportive environment for new small business innovations. Applies to retail establishments with multiple locations and a recognizable "look" or appearance.

**Calistoga, CA** prohibits formula restaurants and visitor accommodations, and requires that other types of formula businesses undergo review and apply for a special use permit from the Planning Commission. Intended to preserve the unique and historic character of the downtown commercial district.

**Bainbridge Island, WA** limits large-store retail to three commercial zones, and limits auto-oriented development to two of three of these zones. Does not have an overall cap on retail square footage; however, it does have size limits in certain overlay districts and zones. Also limits the location and size of formula take-out food restaurants. Formula take-out food restaurants are permitted in only one zone and may not exceed 4,000 square feet, nor occupy more than 50% of any building.

**Westwood Village, CA** limits certain uses such as auto repair and pool halls and uses a density-related formula for fast food establishments; they are permitted provided the total along any public street does not exceed one for every 200-400 feet of lot frontage along that street. The Specific Plan has very detailed guidelines for permitted uses (see Section 5: Uses). <http://cityplanning.lacity.org/complan/specplan/pdf/wwdvil.pdf>

**Arcata, CA** limits the number of formula restaurants to nine at any one time.

**Newport, RI and Davis, CA** have regulations for various types of restaurants.

**Berkeley, CA** has a quota system limiting the number of food service establishments. Telegraph Avenue Commercial District Provisions are very detailed. Retail Sales section is below; entire table located at <http://codepublishing.com/CA/Berkeley/cgi/NewSmartCompile.pl?path=Berkeley23E/Berkeley23E56/Berkeley23E56090.html#23E.56.030>

For even more information about creating critical mass of retail in your downtown, please watch Roger's video "Downtown Critical Mass" in the RBI Video Library.

### 34. Pass a bylaw limiting the number of chain stores in the downtown

**Timeline:** Summer 2017

**Who takes the lead:** Okotoks Town Council

**Approximate cost:** None

**Possible funding idea:** None required

**Rationale and/or details:** This concept is briefly discussed in Recommendation #33. A large part of branding is being distinctive and different from competitor destinations. Why would someone travel to Okotoks if they could get the same thing

closer to home? Okotoks' downtown retail mix needs to focus on unique retail and dining offerings. Chain stores weaken the unique character of a downtown destination, eroding community character. Encourage local ownership, and restrict the number of chain stores in the downtown district.

As Jane Jacobs writes in her book "The Death and Life of Great American Cities", what constitutes community is not any one particular thing, but rather the many small interactions that occur in our everyday lives. "It grows," she writes, "out of people stopping by the bar for a beer, getting advice from the grocer and giving advice to the newsstand man, comparing opinions with other customers at the bakery and nodding hello to the two boys drinking pop on the stoop . . . hearing about a job from the hardware man and borrowing a dollar from the druggist . . ."

"Most of it is ostensibly utterly trivial, but the sum is not trivial at all. The sum of such casual, public contact at the local level . . . most of it fortuitous, most of it associated with errands . . . is a feeling for the public identity of people, a web of public respect and trust, and a resource in time of personal or neighbourhood need."

The Village of Port Jefferson on Long Island bans formula restaurants on its waterfront and historic district, and Nantucket, Mass., for several years has banned new formula stores in much of its business district. Similar restrictions can be found in Ogunquit, Me., Fairfield, Conn., and San Juan Bautista, Calif., the Spanish mission town where Alfred Hitchcock filmed parts of "Vertigo."

### **35. Set adequate but reasonable liability insurance requirements for events operators**

**Timeline:** Summer 2017

**Who takes the lead:** Town of Okotoks

**Approximate cost:** None

**Possible funding idea:** None required

**Rationale and/or details:** A key to successful destinations is the delivery of visitor experiences, and some of these will be participatory activities, not passive experiences. The more there is to do, the longer visitors will stay, and the more money they will spend. All this visitor activity increases the town's tax base. There is inherent liability risk in any economic endeavor that includes serving the public. Simply having people walking down the municipal sidewalk is a risk cities take every day. Benefits and risks are weighed in the balance all the time. In downtown Okotoks – it's going to be a part of doing business. The visitor expects and wants to be engaged in some sort of physical activity like dancing, demonstrations and other active pursuits. The Town needs to realistically evaluate and allow these kinds of commercial offerings, if it is to deliver on the brand. If the benefit of an increased tax base outweighs the potential litigation, or more likely, increased insurance costs, then they should pursue it.

That's the situation in any Disney Park, any Six Flags water park, any other theme park, or tour operator, or boat operator, or downtown district. The heavier you try to protect the town from every possible litigious situation, the more you hamper the possibility of success. Every roller coaster has some inherent dangers associated with it, but they are still built, and people drive for hundreds of miles to experience them. While this is an extreme example, what if someone fell and broke an ankle in Okotoks while on ice skates, and they decided to sue the Town because there were too many people on the rink? Does this mean that Okotoks should never have built the plaza?

One example is the Riverwalk in San Antonio, Texas. The river walk, in the '60s, was a crime-ridden, run down area of San Antonio that was avoided. Today it is one of the country's best attractions. However, it is not ADA accessible (for the most part), there are no railings to keep people, pets and kids from falling into the water, the roots of hundreds of trees have made the walkways uneven and, in some cases dangerous. But if they were to make the Riverwalk totally "safe" to meet the satisfaction of town attorneys, it would cost billions of dollars and would ruin the "organic" nature of this great attraction. You can bet the risk and occasional lawsuits are outweighed by the tremendous tax base built on and around the Riverwalk.

Another example is Asheville, North Carolina. The downtown has dozens of sidewalk cafes, and they do not force the restaurants to create barriers between diners and pedestrians. In many, many cases, the dining patrons have chairs situated that could, in fact, impede ADA access. But being there on several occasions watching sidewalk traffic, we've noticed that when those in wheelchairs or pushing strollers through busy dining areas approached, patrons would automatically say "excuse me" and move their chairs in so people could get through. And, last I heard, they had never had a lawsuit or complaint. Nor does the town put up rules and regulations that strangle local businesses and the "organic" ambiance of the town.

### **36. Work with property owners on lease agreements - open days and hours with an evening focus**

**Timeline:** Summer 2017, ongoing

**Who takes the lead:** Plan Manager, downtown proprietors

**Approximate cost:** Staff time

**Possible funding idea:** None required

**Rationale and/or details:** Downtown property owners and merchants must understand the "Mall Mentality." Together, they are what will make downtown the heart of Okotoks' pedestrian setting. Just like a mall they must have consistent hours and operating days. This needs to be part of the lease agreements between the tenant and property owner.

If a retailer signs a lease in a successful mall, the lease will say they will open at a certain time (usually 10:00 am) and if they are not open by 10:05 they are fined \$1,000 for every five minutes they open late. And the same is true with closing times (typically 9:00 pm, seven days a week). Property owners need to do the same thing in downtown Okotoks. As a result, their tenant will, over time, see big increases in sales, and downtown will become a major destination.

We are moving to the European Standard – we are eating and shopping later in the evenings. In fact, seventy percent of all consumer bricks and mortar spending now takes place after 6:00 pm. That's right: seventy percent.

This fact is why downtowns have been dying across North America, and people began gravitating to the malls. Virtually every successful mall in North America opens at 10:00 am and closes at either 9:00 or 10:00 pm – seven days a week. Downtowns need to follow suit, but it starts with the property owners.

The future of downtowns is to become the place people head after work and on weekends. This doesn't mean downtowns should be closed during daytime business hours, because there's still that other 30%, plus your downtown breakfast, coffee break and lunch crowd, which is important.

Successful downtowns are all about dining, entertainment, performing arts, and specialty shopping: the bakery, butcher shop, and home accents or clothing. Downtowns are back, in a big way, but the bulk of what makes them work is what's open at the end of the day.

We urge your downtown merchants and property owners to watch the Roger Brooks three-part video series "The 20 Ingredients of an Outstanding Downtown" where Roger showcases why this is important. Over several years Roger and his team surveyed more than 400 successful downtowns and downtown districts and developed the twenty most common ingredients that led to their success. One of those is evening hour shopping and dining.

The biggest pushback to staying open after 6:00 pm is the small single-employee merchant who needs to head home to fix dinner and have family time. The "Shared Worker" program is a way to help sole proprietors and other small retail businesses stay open into the evening hours at an affordable cost, and without sacrificing personal time off.

The bottom line: Work with your property owners and new businesses being recruited into downtown so that the lease agreements say they will be open six or seven days a week (if six days a week is the rule, then Monday should be the day they

are closed) and until 8:00 or 9:00 pm every day except perhaps Sunday, when shops might close at 6:00. Sunday evenings are typically the slowest retail hours.

### **37. Work with the school system on integrating STEM and other technologies, green living curriculum**

**Timeline:** Fall 2017

**Who takes the lead:** Brand Leadership Team (BLT)

**Approximate cost:** None

**Possible funding idea:** None

**Rationale and/or details:** The Okotoks brand theme builds on the creativity and innovation in environmentally forward thinking that has brought many acknowledgements and awards to the Town. Linking the brand to the local schools engages students in the town identity as well as strengthens the demonstration of the brand and makes it more pervasive throughout the community. Find ways to bring school STEM programs back out to the community through science fairs, downtown innovation centres for kids, and visible demonstration projects. For example, at the elementary level, Edison School as an advance placement course in environmental science. Wouldn't it be cool to have their projects shown in the pavilion? Encourage the schools to offer courses in green technology understanding and development.

### **38. Bring Roger Brooks back for a review workshop**

**Timeline:** Fall 2017

**Who takes the lead:** Brand Leadership Team (BLT)

**Approximate cost:** \$12,500 for a multi-day retreat, reconnaissance and speaking engagement

**Possible funding idea:** BLT, local businesses, downtown association

**Rationale and/or details:** Plans such as this are very fluid and they change. Over time enthusiasm tends to wane and when this happens, consider bringing Roger Brooks back for a day, or two or three to keep things moving forward, on track, and progressing. Sometimes people need a motivational visit to pump up the troops.

No matter what, you cannot let the enthusiasm wane. Especially in tough times and when you've narrowed your focus, which everyone won't agree with. But you cannot let that happen if you hope to make this plan come to fruition. If you find you need help, Roger Brooks, or an outside facilitator, can address challenges and new opportunities, ask questions, give advice, talk about funding options and marketing, facilitate differences in opinions, motivate the troops, and, while at it, update the plan. This presents a great opportunity to showcase what you've done to date, and the changes made in your product development and marketing efforts.

This may be something you want to do each year, to keep up enthusiasm and to make any necessary course corrections.



## YEAR 2018

### 39. Purchase or subscribe to CRM software

**Timeline:** Spring 2018

**Who takes the lead:** Plaza & Pavilion Event Recruiter and Coordinator

**Approximate cost:** \$2,500

**Possible funding idea:** BRZ funds if the district is developed

**Rationale and/or details:** This will be the database you will use to catalogue and later invite event organizers into downtown Okotoks.

We recommend your Event Recruiter use a CRM (Customer Relations Management) resource such as Salesforce, an inexpensive web-based program where you can enter hundreds of local and regional non-profits, clubs, and associations that hold events into a database, track them, create follow-up programs, and keep track of all correspondence between these organizations and the staff. In fact, the entire staff should have easy access to the Salesforce program. Using a service like this can keep all of the correspondence, contracts, conversations, and follow-up in a single, unified place.

The \$2,500 expense noted above is if you decide to contract with an outside vendor to help set up and train staff on how to use Salesforce or another CRM product. The monthly charge is just a few dollars.

The logistics involved in hosting 250 event days, PLUS another 100 event days for local events make coordinating the efforts of the entire team extremely important from sales, to contracts, to logistics, to follow-up. In many instances you will have multiple events happening at the same time – particularly once both the pavilion and plaza have been developed. There may be an event at the high school while another sports tournament may be happening at one of the parks. We want ALL of these people to descend on downtown at the end of the day, and that can require some major logistical hurdles like parking, staging, and making sure all have a good time.

### 40. Create a database of clubs and organizations

**Timeline:** Spring 2018

**Who takes the lead:** Plaza & Pavilion Event Recruiter and Coordinator

**Approximate cost:** Primarily staff time

**Possible funding idea:** None needed

**Rationale and/or details:** Once you have CRM software, this database will be developed to include regional clubs and organizations that host periodic events, always open to the public. You want as many of these as possible in downtown Okotoks. You are the host and responsible for getting the people downtown; they do the marketing and production of the event.

To find organizations to recruit, there are comprehensive guides available in print or online:

- a. Directory of Business and Trade Associations/Organizations; Canadian Company Capabilities (CCC), Innovation, Science and Economic Development Canada, Government of Canada. (Online)
- b. Associations Canada 2016, (37th Edition, Grey House Publishing, Canada. Associations Canada provides the most comprehensive picture of Canada's non-profit sector, covering Canadian organizations and international groups including industry, commercial and professional associations, registered charities, special interest and common interest organizations.

This annually revised compendium provides detailed listings and abstracts for nearly 20,000 regional, national and international organizations, enabling users to identify an organization's budget, founding date, scope of activity, licensing

body, sources of funding, executive information, full address and complete contact information, just to name a few.

In addition to its detailed entries, Associations Canada also provides powerful indexes to help researchers find information quickly and easily. The following indexes are included: subject, acronym, geographic, budget, executive name, conferences & conventions, mailing list and registered charitable organizations.

c. Alberta Not for Profit Associations, AMCnpo solutions. (online)

You are looking for clubs and organizations that hold periodic events, and you'll be inviting them to Okotoks. You want to invite organizations that are located within the region. So go through the directories and find the clubs and associations that have a presence in your geographic market area. Then enter the information for each that might be a possible event into your CRM software.

Clubs and organizations you hope to attract include:

- |                          |                           |                       |
|--------------------------|---------------------------|-----------------------|
| - Aeronautical showcase  | - Dog shows               | - Pet fair            |
| - Artisan Craft Exhibits | - Farmers market          | - Photography expos   |
| - Arts & Crafts fairs    | - Fly fishing shows       | - Pottery shows       |
| - ATV shows              | - Garden Shows            | - Public markets      |
| - BMX exhibitions        | - Gift shows              | - Quilt guild shows   |
| - Boat shows             | - Halloween events        | - Silent sport shows  |
| - Brew and wine festival | - Home shows              | - Ski exposition      |
| - Bridal fairs           | - Hunting expos           | - SMERF groups        |
| - Christmas forest       | - International kids fair | - STEM groups         |
| - Classic car shows      | - Job fairs               | - Snowmobile expos    |
| - Concerts               | - Motorcycle shows        | - Spa and yoga        |
| - Culinary education     | - Outfitters & clothing   | - Wellness exposition |

Not only are you trying to attract hobby clubs (like classic car shows), but also non-profit organizations, and thousands of other cause-oriented organizations that host fund-raising events from 10k runs, to triathlons, to walks, and all types of other events.

In almost every case they give you contact information, a phone number, address and what kind of organization they are. You want to do your marketing by phone and snail-mail. The reliance on e-mail is far too widespread, and so this is a more personalized approach. And this database is your bible in terms of reaching out to over a thousand organizations. Another good resource is to scan the event calendars of other communities, and see what organizations they are hosting that might be a good fit for Okotoks.

As you develop the database your staff will need to make judgment calls: volunteer fire departments are often non-profits but the chance of them hosting an event in Okotoks, instead of their home communities, is pretty slim. Only go after the ones that host larger events and are willing to drive 100 miles or more to host the event.



You will likely end up with about 1,000 contacts in your database – and that’s a LOT. Once you get a club, chances are you can book their event once, and if it is successful, and you are awesome hosts, you’ll get it for the same weekend, every year, for years. That’s the goal of this effort: Invite them once, treat them right, and have them come back year after year.

Many of these host annual conferences, exhibitions, trade shows and consumer events. Initially (until the pavilion is built) you are looking for consumer-oriented public events. As part of this effort, come up with ten or twenty unique event names that you can pass on to these organizations.

Especially concentrate on those within a two to three-hour drive. This is your primary target area. This database is the lifeblood of your marketing effort, so take the time to build it right, and then start calling on every club, association, and organization.

Another great way to build this database is to work with your provincial organizations. Chances are excellent that you have Harley and Gold Wing owners. Talk to them about hosting an event at Okotoks. The same could go with automobile clubs: Mustang, Subaru, Mercedes, BMW, Volkswagen and many, many others. Then there are your auxiliary organizations that host events: Kiwanis, Rotary, Lions, Elks, Eagles, and others.

One final word: In the first two or three years of this effort, do NOT put obstacles in their way like big charges for portable toilets, staging, sound, lights, security, etc. You want to create incentives for them to host their events in Okotoks. And ninety-nine percent of these organizations are going to be non-profit groups with very little budget. BUT they will do the marketing, the organizing, invite their members and others. THEN if it’s successful and they agree to come back time and again, at that point it might make sense to collect fees for local services they are using. But until then, what’s in it for Okotoks? Think long term of the tax base that comes from a vibrant, busy, and ultra-successful downtown district, full hotels and new businesses, residents and industry coming into the area that they discovered as a result of an event they attended at the plaza.

## **41. Create a database of press contacts and large non-profits**

**Timeline:** Spring 2018

**Who takes the lead:** Plaza/ Pavilion Event Recruiter, Downtown Tourism Marketer

**Approximate cost:** None (staff time)

**Possible funding idea:** None needed

**Rationale and/or details:** Separately, create a list of non-profits and press in the greater Calgary area and encourage them to host fund-raising events in Okotoks. This would include radio and television station sponsored events.

This recommendation goes beyond just the hobby-oriented organizations to health and cause-related organizations. You also need to create a database of media contacts, including the top radio and television stations in the Calgary and Southern Alberta areas.

Every one of these organizations sponsors special events, fundraisers, and cause-related events. They can be sponsors and/or partners with you. For instance, Citytv might be approached about sponsoring a Santa Run – a fund-raiser for the Alberta Children’s Hospital. Television news and radio personalities will do live broadcasts from Okotoks and help promote the event. In exchange, you should advertise some of your upcoming events on the station so they become one of your marketing partners.

Likewise nearly every television news anchor has a cause that’s near and dear to them. It might be fighting breast cancer, or leukemia, or may have a focus on health or animals. Working with their causes, encouraging them to host the event in Okotoks, will get the town additional publicity as these public figures promote the event and Okotoks as part of newscasts. This is a terrific, no-cost way to promote downtown Okotoks.

Having this database of media contacts will also be very useful in promoting public events and even announcing the brand. It should include:

- Television stations within a two-hour drive
- Radio stations
- Newsprint publications
- Regional glossy magazines (lifestyle publications like Avenue, City Palate, Techlife and others)
- Club and organizational newsletters. Even the Calgary Corvette Club is looking for places to send its members. Create a great driving route to Okotoks so they can caravan out and then have their cars all over and around the downtown plaza.
- National hobby club magazines where you can promote upcoming events that cater to their readers.

## **42. Create a “Guide to Event Production in Okotoks” brochure**

**Timeline:** Spring 2018

**Who takes the lead:** Plaza/Pavilion Event Recruiter

**Approximate cost:** \$12,500

**Possible funding idea:** BRZ funds if the district is developed

**Rationale and/or details:** One of the keys to creating a place where people want to live as well as where visitors want to hang out is generating activity and “animation” of a central “third place” – a gathering place for the community. This is why the construction and operation of the plaza and pavilion is so important. Another key, is, having created the venue, getting others to do most of the work in putting on events and activities that will draw both residents and visitors downtown where they can spend time with their friends, and importantly, spend money in the nearby restaurants, and retail shops. Since the goal is to create 250+ days of activities that will draw 300+ visitors each day, it would be impossible for the plaza and pavilion staff to produce every event. Instead, invite outside producers to put their events on at the plaza in Okotoks. This is the purpose of the brochure.

This would be a tri-fold piece (215 cm x 560 cm that folds to 215 cm x 280 cm) that would include:

- WHY they should host their events at Okotoks (exciting downtown venue, low costs, and a proactive community that WANTS them there, supporting facilities, plenty of decent nearby accommodations, etc.) An entire page would be dedicated to marketing Okotoks as THE event destination.
- Information about hosting events in Okotoks, including contact information and local resources available to them: some municipal assistance, some private-industry like catering or foodservices, and transportation.
- Logistical information like power, sound, lighting, security, fencing for beer gardens, staging, etc.
- A two-page spread would include the layout of the plaza and pavilion and outdoor surrounding area, parking areas, and what streets can be closed or how events can be physically configured.
- Costs for supporting services and event-related equipment (security, trash removal, cleanup, staging, power, sound, lighting, portable toilets, etc.) This could be an additional sheet to be included as an insert so that prices and services can be changed as the brand evolves.

This marketing piece would be printed in full-colour, include lots of photography of Okotoks events, and be sent to potential event organizers, clubs and organizations after they have been contacted or approached by your Event Recruiter. This should also be available in digital format and on a webpage that event producers can access.

### 43. Create new and updated social media campaigns

**Timeline:** Spring 2018

**Who takes the lead:** Downtown Tourism Marketer

**Approximate cost:** Staff time and volunteers

**Possible funding idea:** None required

**Rationale and/or details:** You build your brand on public relations; advertising is used to cement your ownership position. Social media is third party word of mouth and that is the purest form of public relations.

Your brand is a perception – what people think when you say you’re from Okotoks. It’s based on what people read, or first impressions as they drive through town. Branding has never grown as fast as it is now, and that’s due to social media –word of mouth travels quickly.

Downtown Okotoks should always be thinking of crazy fun things to do to tell the world how they can celebrate anything great in their lives. Some of it needs to be emotional and touching, but most of it will be fun, festive and engaging. Some can be a little (or a lot) edgy, so the opportunity of going viral and creating photo opportunities increases.

You want to promote the urban atmosphere. A great downtown alive with activities and great shops and restaurants – every day of the year. Where they will find fun, creativity in its many forms, and the newest innovations.

For instance, having local boosters walking around town during an event wearing a polo shirt with the new brand identity on it, showcasing kids on the ice rink, or families attending “Monday Night Movies on the Plaza” or at concerts, dance recitals and a myriad of other events to really showcase how vibrant and fun Okotoks has become.

There is countless novel, fun and touching things you can do, and now is the time to brainstorm ideas. Here are some ideas that should be included:

- Encourage photographs and videos of people enjoying their personal celebration. These would be populated on Twitter, Instagram, Flickr, Facebook, Digg and YouTube for those shot in video. (This is why a robust downtown Wi-Fi network is important!)
- Using a professional videographer, create a YouTube channel (The “Innovation” channel) and populate it with 30 second to one-minute videos of people at their celebrations at the Plaza or Pavilion. Even businesses can get into the act – yoga on the Plaza is a terrific way to celebrate healthy living. Enjoying a chocolate ice cream cone, first shaved ice, or frozen custard at a local ice cream shop would be a great celebration for many very young people.
- Let your imagination fly and make it fun.

### 44. Improve access to public washrooms on Elizabeth Street and at the plaza/pavilion

**Timeline:** Spring 2018

**Who takes the lead:** Okotoks Public Works

**Approximate cost:** Location dependent

**Possible funding idea:** CRL funds, Town general funds

**Rationale and/or details:** One of the most fundamental visitor amenities is easy access to clean and convenient public washrooms. If consumers have to get in their car to go find a washroom they are not likely to return. Public washrooms are particularly important in pedestrian-oriented downtown areas, and they are essential during festivals and events.



We recommend that the town keep washrooms open at least from 8 am to 10 pm daily, and develop new washrooms as part of the plaza and pavilion revitalization project. The washrooms should be identified by pedestrian wayfinding signage. If freestanding, the washrooms should be developed in an architectural style that is complementary to the existing character of the community, include exterior lighting, and landscaping. The closer the washrooms are to high activity areas, the less likely they will be subjected to vandalism and illegal uses. For more information on public washrooms, view Roger's video entitled "The 20 Ingredients of an Outstanding Downtown (Part 2)".

## 45. Begin development of the plaza

**Timeline:** Summer 2018

**Who takes the lead:** Town of Okotoks

**Approximate cost:** Approximately \$5 million (to be determined in the Plaza Design, Programming and Business Plan, and in the actual construction drawing development – architectural and engineering).

**Possible funding idea:** CRL funds, voter issued bonds, grants, general funds, redevelopment funding, and/or naming rights, fundraising, philanthropy, etc. Every option will have been explored and determined PRIOR to this point.

**Rationale and/or details:** The plaza will probably cost about \$5 million: water feature - \$1 million; sound, lights, stage, power, projection equipment - \$1.5 million; ice, Zamboni, chiller etc. \$500,000, and; plaza development including power, water washrooms, etc. - \$2 million. Now is the time to put the construction drawings out to bid – unless there was a Design/Build contract issued with the architectural and engineering of the plaza. This option should not be overlooked, as the architectural and engineering costs are often reduced since the firm will also get to actually build the project, which is where the bulk of the profit is made.

The goal is to have the plaza open to the public by the end of October in 2019 so it opens with a lit ice rink, in time for the holidays, holiday lighting, and to jump-start downtown development during the fall, winter and early spring of 2020.

Without this project, downtown Okotoks will not see success. You can bring in movie theaters, redevelop upper stories into residential units, but until the town has a programmed central gathering place, local residents will continue to make the trek to destinations other than Okotoks.

## 46. Begin staffing for the plaza

**Timeline:** Summer 2018

**Who takes the lead:** Plan Manager

**Approximate cost:** \$300,000 for three or more staff salaries and benefits

**Possible funding idea:** BRZ funds, general funds, eventually plaza and pavilion revenues

**Rationale and/or details:** The assigned Manager (see organization chart) is, and will be, a central figure charged with implementing this entire plan, with assistance from the Brand Leadership Team, Economic Development Services, Town of Okotoks, Marketing, Promotion & Tourism Services, Research and Information, downtown stakeholders, and volunteers. The future of Okotoks, for generations, is riding on the success of this plan. Its value is critical and cannot be understated. It will take a full time effort, with lots of volunteer help and participation from other organizations, to bring this to fruition.

The staffing starts with the previously hired Manager. This person will lead the effort. Then, in addition, there will be three other positions for the plaza and pavilion and, down the road, a fourth:

- **Event Recruiter:** this person is charged with making sure downtown is hosting at least 250 event days a year.

- **Event Coordinator.** This person will work with the Town fire department, streets department, parks and recreation department, local businesses, and vendors to make sure everyone is pulling in the same direction.
- **Logistics Manager.** This person does the set-up, take down (i.e. beer garden fencing, kids rides, skating rink, etc.) and manages the physical maintenance and management of the plaza such as lighting, water features, and landscape maintenance, working with a number of sub-contractors and town departments.

All of these positions will work throughout the downtown district, not JUST on the plaza and pavilion. This is for ALL of downtown Okotoks, so they have a huge job.

Down the road, a fourth person, an Office Manager, would be hired to help answer phones, work on social media, marketing, and handle bookkeeping, sponsorship agreements, and other administrative details.

Job descriptions would be detailed in the Plaza Design, Programming & Business Plan, but the following will provide an outline of each position, beyond that of the Manager.

#### **Event Recruiter**

This person is 100% dedicated to inviting outside events into Okotoks. The following recommendations go into more detail about how this would be accomplished.

It would be virtually impossible to develop 250 to 300 event days if every event were locally produced, therefore, about 90% of the Event Recruiter's time would be spent inviting outside organizations to host their public events in downtown Okotoks. Every one of these events would bring their own vendors, their members or "tribe" (in social media terms), market the event, set it up, and manage the event. They will fill hotel rooms and bring their own audiences, fans, and associates with them. It is the Event Recruiter's job to bring in perhaps 100 events each year. And 90% of these events should be multi-day events of at least two days. For instance, hosting a major Harley Davidson event, the event set-up might take place on a Friday and the event lasts all day Saturday and runs until Sunday afternoon. The goal is to attract overnight visitors AND local and area residents to downtown Okotoks.

The Event Recruiter will also assist with events already booked at the high schools, parks, or at various sports facilities, working with event organizers to find ways to expand those events into downtown Okotoks. For instance, should the town host a baseball tournament, perhaps the awards banquet or ceremony could take place downtown – or at least complementary activities could be held that will pull these visitors into the heart of your spending district.

Hosting 100 outside events will create at least 200 event days each year. And then, of course, you'll have locally produced events, the splash pad days, ice skating season, street vendors and musicians, etc.

#### **Event Coordinator**

This person is the coordinator between the town's departments, downtown retailers, the downtown tourism marketer (the main marketing arm), and the event organizer. This person calendars the events as well. They are also the coordinator between events held elsewhere in Okotoks, tying those to downtown and also has the ability to charge for some services:

- Police (if needed), security, maintenance
- Closing off streets or areas to vehicle traffic
- Coordinating sound, lights, staging, seating, power access, vendor set-up areas, fencing for possible beer gardens, etc.
- Adding additional portable toilets, garbage barrels and other needs

This person would coordinate contracts, manage street vendors, food trucks, street musicians and artisans, and assist both the Manager and Event Recruiter. This person will make sure agreements are in place; help coordinate third-party vendors (sound, lights, staging and other elements that may not be owned by the town but needed and billable to the event).

### **Logistics Manager**

This person would also be the “On-site Logistics Manager,” making sure each event goes off without a hitch. They would be responsible for the physical plaza and pavilion assets, purchasing and maintaining tables, chairs, flooring, HVAC systems, lighting, sound, staging and temporary booths, bathrooms, janitorial services, set ups and take downs and the like.

The cost of the initial three people and related costs would be in the \$300,000 a year range. This budget includes the cost of staffing, taxes, insurance and benefits, an office, computers, Internet access, office supplies, postage machine, insurance, sub-contracted assistance (accounting, bookkeeping, graphic design, etc.), and a host of other expenses associated with running an organization such as this.

## **47. Develop free, robust Wi-Fi access at the plaza and within a 300 metre radius of downtown Okotoks**

**Timeline:** Summer 2018

**Who takes the lead:** Plan Manager, and Research & Information Services

**Approximate cost:** \$75,000

**Possible funding idea:** CRL Funds

**Rationale and/or details:** Think of free downtown Wi-Fi as a marketing investment, not a freebie for bored visitors. For today’s traveler, the most credible information they get on an activity or destination is from their friends and family. Downtown Wi-Fi enables visitors to instantly upload “selfies” on location at downtown events, showing them having a great time. These are sent to their social networks of friends, many who will in turn forward them on to others. Multiply that several times and you have a huge third-party endorsement of Okotoks. That is why we recommend beautification, street entertainers, photo-worthy public art, and why branded wayfinding signage is so important.

Create iconic sites where kids and parents can take “selfies” and instantly transmit them to their online “tribes”. There is no marketing that does a better job than third party testimony, and putting images of consumers having fun at the plaza on thousands of social media pages goes a long way toward spreading the word. Make sure the iconic site (innovative or interactive sculpture, sign, artwork, etc.) contains the location name or downtown logo. Disney has perfected this with their walking animated characters.

You can also place QR codes or pop-ups (and in the future, even easier scans) near event locations, monuments and interpretive signage so that visitors can download audio and video enriched interpretive content. For a destination rich in activity, this will help tell the story of Okotoks, engage the visitors and direct them to additional experiences. Envision a QR code at the new pavilion that downloads a calendar of events to your phone, or even puts the event list on your calendar. Maybe you put “The Very Best of Okotoks” brochure on your login site.

An important benefit of public Wi-Fi is that all this Internet activity can be analyzed and controlled from a central location. For example, you can monitor which types of devices are most used to upload photos and text, and tweak the system to maximize their speed and efficiency. You can see which Wi-Fi access points are being used the most, and improve the photo opportunities at those that are lagging behind. You can monitor traffic highs and lows, so you know when visitors are most active downtown, and you can turn access points on and off if you want to restrict or throttle back different sections of downtown at different times. You can even ban local businesses that are using the public Wi-Fi for private business, if it affects overall Internet speed.

In this age of central gathering spots and sidewalk cafes, having consistent, high quality broadband Internet access is very important- especially if your brand is about innovation in technology! Starbucks understands this and Wi-Fi is an integral part of their marketing strategy. In a town where you are trying to attract young families and entrepreneurial types, having free broadband access is a huge selling point.

Consider requiring people to formally log in to use the Internet after an initial 20-minute period. They provide their name and e-mail address (no more information than that) after which they are automatically reconnected, and added to your e-newsletter database, so they will receive notices about upcoming festivals and events. They would be able to opt out if they wish.

#### 48. Add street trees where they don't exist downtown

**Timeline:** Summer 2018

**Who takes the lead:** Okotoks Public Works

**Approximate cost:** \$120,000 including 7.5 cm to 12 cm caliper street trees, irrigation, sidewalk and infrastructure redevelopment to accommodate them.

**Possible funding idea:** CLR funds, grants, private donations

**Rationale and/or details:** Street trees have been proven to increase retail sales and services by an average of nearly 20% according to the Keep America Beautiful network and the Arbor Foundation.

Nothing adds to ambiance more than street trees. The complaints about street trees is nearly limitless, yet cities that plant them every 10 meters see an average of nearly 20% increases in retail sales and services on the blocks where the street trees have been planted.

Excuses include:

- The leaves will block storm drains in the fall/winter months
- They block retail signage
- The roots will gradually uproot sidewalks
- It's hard to remove snow from around them
- They require periodic maintenance
- They are expensive to put in

Every town that installs street trees has seen a major increase in retail sales and services, increased property values (tax base) and increased visitor spending. The cost of maintaining the trees, sweeping up leaves during late fall months, and snow removal around them is more than offset in increased retail sales and property values.

Specialized tree grates have been developed to keep roots inside an underground "vault," underground irrigation makes maintenance easier, and the argument that trees block signage is easily dismissed since the trees bring so many additional customers into downtown. Street trees create a sense of intimacy, create shade, and offset the harsh



environment of concrete, asphalt, and buildings. Why do you see office buildings, even malls, with trees (often fake)? Because they create a soothing, intimate feeling that encourages people to linger longer, which translates to increased spending.

Street trees should be placed along the core retail area of Elizabeth Street.

For examples of cities that have done this, Google images for downtown Lodi, California or Greenville, South Carolina. These are just two quick examples of how powerful street trees are to a downtown.

#### **49. Allow, encourage and budget for street artisans, musicians and buskers**

**Timeline:** Summer 2018

**Who takes the lead:** Plan Manager (permitting), Town Council (bylaw)

**Approximate cost:** \$10,000

**Possible funding idea:** possible BRZ funds

**Rationale and/or details:** Take Okotoks BuskersFest to a whole new level! Animating downtown and the area around the plaza and pavilion is a top priority. The idea is to make sure there are activities 250+ days a year. Each day when an activity is going on is an “event day.” Having street musicians, entertainers and artisans also creates “event days.” The goal is to make downtown Okotoks the place for residents and their guests to come after work – for dinner or after dinner, and on weekends. Remember, visitors want to go where the locals go. If you don’t hang out downtown, neither will the tourists. The only “slow” night would typically be Sunday evenings. Bringing downtown to life includes an active buskers program: street musicians, magicians, and artisans.

Encourage, but guide, street musicians and artisans. Free outdoor entertainment downtown is an excellent way to attract people, making downtown lively and active. In order to attract these musicians, performers, and artisans downtown during peak hours, establish a budget of perhaps \$10,000 per year to pay street performers a small amount (perhaps \$35 for three hours). They would also be permitted to make money from tips. No panhandling is allowed, although they can have an open guitar case or bucket for tips.

Here are some general guidelines to get you started:

- Buskers should be no closer than one block apart
- They should sign a code of conduct and obtain a free permit before they can begin
- Consider developing sidewalk “stars,” marking locations where they can perform
- All music must be unamplified and drums are not allowed
- Music should take place throughout the day but end by 10:00 pm.
- Buskers can include artisans in action, mimes, magicians, acrobats, musicians, and other forms of sidewalk entertainment.

We recommend starting the program on Fridays from 4:00 pm to 8:00 pm, Saturdays from 11:00 am to 3:00 pm, and from 4:00 to 8:00, and on Sundays from 11:00 am to 3:00 pm during the spring, summer and fall months. Over time, this can expand to every day and other daylight hours such as during the lunch hour. In places such as Nelson, British Columbia and Asheville, North Carolina, they no longer pay local buskers, yet the town streets have dozens of musicians, artisans, and performers who are there 360+ days a year.

Street entertainers and artisans should be required to file a short application for a “vendor permit” with the downtown Manager. There would be no charge for the permit, but the vendor would agree to specific guidelines. There must be no overt panhandling; music would be non-amplified; they must stay within a designated, confined space; if there are complaints, the



town may revoke their permit immediately, without cause. Each permit would be good for three or four months, after which the vendor would need to apply for a new permit. This will allow the town to have current information on the vendors.

Work with regional universities, community colleges and high schools to find talent for downtown. If music isn't readily available, artisans in action are also great additions to downtown.

If you have the time and energy, consider auditions to keep the quality high. They do not need to be assigned to individual locations, as long as they play at a "busker station" marked on sidewalks.

The Manager – not the town or some other organization or agency, should manage enforcement. If there are flagrant violations by a busker, the town may need to be called in to have the person removed, but in our experience, that is very, very rare.



## 50. Implement a "shared worker" program downtown

**Timeline:** Summer 2018

**Who takes the lead:** Plan Manager, or the Chamber of Commerce

**Approximate cost:** Staff time

**Possible funding idea:** None required

**Rationale and/or details:** The life of downtown is counting on retailers staying open well past 6:00 pm. Sometimes this is a challenge with Mom and Pop operations, where they need to head home to fix dinner for the kids, or need to have time for other mandatory activities, or simply a life outside their store.

The "Shared Worker" program is a way to help sole proprietors and other small retail businesses stay open into the evening hours at an affordable cost, and without sacrificing personal time off.

Rather than spell out how the program works, take the time to encourage your downtown merchants to watch the Roger Brooks video (at their leisure) "Is Your Downtown Open After 6:00 pm?" This one-hour video showcases why this is important and how to actually implement the Shared Worker program. This is a program that can be spearheaded by the Chamber of Commerce, a Main Street Program or even a local service organization.

This video is a MUST SEE for the Chamber of Commerce, Town officials and local property owners and merchants.

## 51. Implement a hospitality-training program

**Timeline:** Summer 2018 and ongoing

**Who takes the lead:** Plan Manager, retail and dining proprietors

**Approximate cost:** \$6,000

**Possible funding idea:** possible BRZ funds

**Rationale and/or details:** Brands must be more than skin deep. To really “own” the brand that exhibits green technology, creativity and innovation as well as a family-friendly community and destination, everyone, from the retail and hotel staff to the dining staff, must be hospitable and friendly. But if you hope to have front-line employees come to a host-training workshop on their own time, guess again.

We recommend purchasing the 15-minute video “The Guest” version 2, produced by Media Partners in Seattle. This 15-minute film is humorous, easy to watch, and is a great way to “teach” hospitality without it being time consuming and degrading. When front-line workers realize that every customer is paying something that directly goes into their paychecks, they often will realize how important that person is to their paycheck.

The way to do this is to set up appointments where the Manager or volunteer can come into a business, meet with the general manager, front desk manager, and staff for no more than half an hour. Using a 27 inch or 30 inch computer monitor or television, you’d show the 15-minute video and then talk to the staff for an additional 15 minutes. That’s it. And this should be done every few months at just about every business due to the high turnover of front-line employees. During the 15 minutes following the film, you will tell them about the Okotoks brand and plans. You want your front-line people to be happy, courteous, friendly, and outgoing.



## 52. Install decorative street crossings

**Timeline:** Summer 2018

**Who takes the lead:** Okotoks Roads & Traffic Department

**Approximate cost:** About \$90 a square meter

**Possible funding idea:** CRL funds

Once you know where the main sidewalk crossings should be from one side of Elizabeth Street to the other, and at entry points into the downtown from Northridge Drive and Centre Avenue, augment the journey with decorative street crossing.

At present, downtown Okotoks is relatively quiet and casual. Some crosswalk points are faded or unmarked, yet this is the most concentrated area for visitors unfamiliar with the direction and amount of traffic. We recommend upgrades and designations of street crossings that prominently indicate to both drivers and pedestrians where street crossing is expected and permitted.

This is also an opportunity to extend the beautification of the downtown with designed crosswalk embossing through a Duratherm™ process. This StreetPrint™ asphalt stamped process is weather resistant and durable enough to withstand snow removal.

### 53. Update downtown pole banners

**Timeline:** Summer 2018

**Who takes the lead:** Okotoks Roads & Traffic Department, Plan Manager

**Approximate cost:** \$7,500 (for 50 pole banners in two designs)

**Possible funding idea:** possible BRZ funds

**Rationale and/or details:** Update downtown pole banners to showcase the plaza, pavilion and expansion of dining and retail shops. Pole banners should always portray a feeling – a creative and playful brand. They should convey a welcoming, fun, engaging, and celebratory atmosphere. We have designed some concepts that you can use as a basis.

Use three or four colours to make the town feel vibrant and attractive. You can have one style for downtown, and other styles for other areas in the town. But, over time, they should be everywhere.

Some cities offer local businesses a chance to sponsor a number of pole banners. In this case, you add to the bottom a hanging banner with the sponsor name – it is usually 16 cm tall and the width of the banner. This is a good way to expand the program while promoting local businesses. Use text only for the sponsor banner.

Down the road, the downtown pole banners can change by season, but to start, have two designs: one for the downtown, and one for the major thoroughfares. The pole banners should go up when the plaza is under construction, but not before. Remember that these reflect a “new” or emerging downtown so change needs to be obvious.



Pole banner design concepts







#### 54. Begin funding, design and development of shared parking structures downtown

**Timeline:** Fall 2018

**Who takes the lead:** Town Roads and Traffic Department

**Approximate cost:** To be determined

**Possible funding idea:** CRL funds, Private funding from downtown businesses

**Rationale and/or details:** In order to reconfigure downtown Okotoks as outlined in this Action Plan, and to accommodate the anticipated greater volume of pedestrians, a new strategy for parking will be required.

Since the 1950's the downtown parking formulas in North America have been based on "X" amount of parking per "X" amount of retail space. While this approach has been "old hat" for 15 to 20 years, many cities are still hanging on to it in their bylaws and permitting.

One of the physical aspects of downtown Okotoks that inhibits a vibrant, walkable environment is the "strip mall" layout with block after block of off-street parking in front of retail.

Today's new model should include "shared parking." For example, a church or a bank might build enough parking to accommodate their patrons on weekends or during the day, but the spaces could be shared and therefore the cost of parking could also be shared the other six days of the week and during evening hours. Only housing and lodging should have dedicated parking. And, we support the idea of public sector developed parking structures and lots that are "leased" or "sold" for exclusive private-sector development of downtown hotels, or upper level housing.

Parking does need to be within a two-block walk of the retail sector they service. However, parking does not have to be free. It has to be "worth it."

We like the model used in Walnut Creek, California. The City owns a full 70% of the downtown parking (the other 30% are privately owned pay-to-park lots). Retailers are not required to pay for or build parking spaces. The city charges \$1 per hour for up to three hours. After that, parking is free. This incentivizes people to stay longer.

For Okotoks, having Shared Public Parking in two locations (at or near each end of Elizabeth Street) would allow for the redevelopment of all the front-loaded parking lots, and would allow, over time, the removal of street-front parking so that sidewalks can be widened and a buffer placed between the new wider sidewalks and traffic flow.

Turning current parking lots into plazas, or even additional retail development will turn downtown into a terrific destination that supports the overall brand of being cutting edge in technology, helping to reduce the reliance on vehicles (at least in downtown), will reduce the amount of pavement downtown allowing for better drainage and less oil and wastes ending up in the ground water supply, and will make downtown Okotoks a "pedestrian-friendly" destination.

Finally, by creating shared parking, it will encourage additional private investment into downtown - the tax base, which will help offset the cost of developing the parking structures. New development would NOT be required to build parking spaces, but would help fund additional parking (the cost of perhaps 10 spaces) would be "banked" for future increases in parking development.

Contract with a parking professional for assessing locations, costs and funding for downtown Okotoks parking structures.

## YEAR 2019

### 55. Contract for the manufacturing and sale of branded logo gear

**Timeline:** Spring 2019

**Who takes the lead:** Downtown Tourism Marketer

**Approximate cost:** Self-funded (but may require some seed funds). To be contracted

**Possible funding idea:** Private funding (business opportunity)

**Rationale and/or details:** To tell the world about Okotoks' brand, develop logo gear that can be sold at local retail stores, in the mobile visitor information centres, at the pavilion, and other local retail outlets. Using the new brand identity and tagline, create collectibles and logo gear that can be sold:

- Polo shirts (have the brand identity stitched above the breast pocket location). Don't make these billboard shirts with huge logos on them.
- Baseball caps
- Memory sticks
- Coffee mugs and/or water bottles
- Car decals

Logos on outdoor recreational clothing and gear is a perfect fit since the goal is to make Okotoks THE place to meet with family and friends. Make up a list of brand-specific goods that could include the Okotoks "Trademark" and would reinforce the brand.

Make sure they are colourful and something a visitor would want to wear and want to have. Think like a visitor – what you might buy and wear when you go to Banff or Niagara Falls, for example.

Get together and think of clever and edgy slogans that would sell. Remember to sell the experience – not just the destination.

Keep the franchise agreements simple. Add a 20% mark up to the cost of production and shipping for your take, and set a maximum price that the vendor can sell the items. You don't want the items to be so expensive that no one buys them. The idea is to get them bought and worn, all over the country (and world).





## 56. Apply the brand graphics to town vehicles

**Timeline:** Spring 2019

**Who takes the lead:** Okotoks Operations Centre

**Approximate cost:** To be determined

**Possible funding idea:** Town departmental funds

**Rationale and/or details:** Applying branded graphics to town vehicles is a fantastic way to promote the brand and solidifies “ownership” of the brand.

Over time town vehicles may need to be repainted, and when that opportunity arises, include the new brand. Start with parks department vehicles, then perhaps public works vehicles. Because the brand is very technology and green oriented it may not be appropriate for police and fire vehicles, which is fine. But for those vehicles used for other departments, it's perfectly appropriate and fitting and will help reinforce “ownership” of the brand.





## 57. Build an indoor/outdoor market pavilion

**Timeline:** Summer 2019

**Who takes the lead:** Brand Leadership Team (BLT), Economic Development Services

**Approximate cost:** \$5-6 million (depending on shared space with the plaza)

**Possible funding idea:** CRL funds, grants, special taxes (see below) philanthropy

**Rationale and/or details:** Unless the pavilion is built at the same time as the plaza, it's time to get it going. Next to the plaza, a year round public market is the second most powerful draw and “anchor tenant” for downtown. It creates indoor activity space, also programmed, so that weather is never a deterrent to spending time in downtown Okotoks.

Recommendations for the pavilion include:

- It should be located next to and adjoining the plaza.
- It should be a fixed structure that, from the exterior, fits the downtown brand (with green technology) and has large window spaces very much like a greenhouse. As with any public market building you want wide-open interiors, as much natural light as you can get into the facility. You'll have large ficus trees inside, lots of greenery, and a very open-air feeling.





- The market should be open year-round, primarily on Thursdays, Fridays, Saturdays and Sundays. Over time, the market would expand its operating days to include Mondays, Tuesdays and Wednesdays.
- The market would open at 11:00 am each day and close at 9:00 pm on Thursdays, perhaps 10:00 pm on Fridays and Saturdays and at 4:00 pm on Sundays. The days of morning markets are over as more people move to evening-hour shopping, dining and entertainment.
- The market should include a centre stage for cooking demonstrations, unamplified music or entertainment during the lunch and dinner hours. This way the market becomes a central gathering spot for both locals and visitors.
- The mix should include one-third raw, locally or regionally grown/produced foods: fruits, vegetables, dairy products, fish, poultry and meats. One third should be dedicated to locally prepared foods: cupcakes, deli-style sandwiches, prepared and ready-to-cook dishes, breads and baked goods, etc. The final third would be locally crafted goods: art, jewelry, clothing, home accents, toys, etc. It's important that all goods be as local as possible.
- The market would shift its focus depending on the season, and would be programmed accordingly. For instance, during the months of November and December the market could include a Christmas Tree Forest and would feature all kinds of locally or regionally crafted gifts and decorations. In January it might be home to ice carvers. In October perhaps it becomes a haunted house. This space would always be flexible for just about any kind of public use.
- The market is "Flex Space" meaning it can also host trade shows such as fishing and hunting shows, RV shows, job fairs, wellness retreats, fitness boot camps, science fairs, technology exhibits and other events detailed earlier in this plan. The market should be in the 1,860 square meters range. Nearly 375 square meters will be needed for:
  - Vendor storage lockers
  - Rod and drape trade show booth assembly
  - Sound system and HVAC
  - Public washrooms
  - Market office
  - Refrigeration/walk in freezer
  - A warming kitchen
  - General storage

The pavilion is VERY important, as it will make downtown Okotoks a great place to be when it's below freezing, raining, or extremely hot. It takes weather out of the equation, which is VERY important to downtown merchants who are counting on the plaza and market to bring customers downtown.

During the peak months much of the Farmers Market season will include vendors both inside the market as well as throughout the plaza area. In fact, we'd love to see the market become a major destination within a 30-mile radius with vendors all over downtown – so many that it requires closing of a street or two. The goal: To have the biggest, best and most incredible public market in Alberta. And, best of all, it will be in a country setting where the produce is actually grown.

Once the market is developed downtown Okotoks will act as its "marketing agency" and will work with market management on recruiting all kinds of events into the market. The list earlier in this plan is just a starting point for activating and programming the market.

The pavilion will cost about \$1,300 a square meter; maybe less if it shares certain infrastructure with the plaza. In Rapid City, SD their Main Street Square was partially funded with "vision funds", a ½ cent sales tax the city put in place in the 1970's after a major flood in the town. The money could only be used for community projects, not streets, sewers, etc. Search for provincial

and federal funds. The Grove Arcade in Ashville, North Carolina raised \$13 million from over 80 separate federal and non-federal sources.

## **58. Create a YouTube channel and load it up**

**Timeline:** Summer 2019 and ongoing

**Who takes the lead:** Downtown Tourism Marketer

**Approximate cost:** Staff time and volunteers

**Possible funding idea:** None required

**Rationale and/or details:** Video is the future – and short ones at that. Thirty seconds to three minutes, tops. You want both professionally produced videos and user-generated videos of people telling their Okotoks story.

YouTube is now the world's second most used search engine. Nothing sells like video. Starting as soon as the plaza is up and running, you want to create a YouTube channel and start populating it with user-submitted videos and a call to action "Look what's happening in Okotoks!" and "Where are you headed this weekend?"

Have local high school students, or even nearby college students submit videos. Some may be silly, some quite fun, and perhaps some will be edgy, but it's a good way to build the brand, create excitement, and solidify your ownership position of the place of creativity and innovation.

Over time you'll add more professionally produced videos to mix in with the user-submitted videos. All should run from 20 seconds to three minutes. The median running time should be one to two minutes. As you review them make sure they would make you want to go there if you lived in a different town. Link them to your new tourism website once developed.

## **59. Develop a detailed Marketing, Advertising & Publicity plan and budget. Tell the world**

**Timeline:** Summer 2019 and ongoing

**Who takes the lead:** Downtown Tourism Marketer

**Approximate cost:** \$200,000

**Possible funding idea:** Possible BRZ funds

**Rationale and/or details:** Once you've got the plaza developed, the pavilion on the way, a new revitalized mix of businesses downtown, its time to really "tell the world" about Okotoks, making it one of the best destination cities in Canada.

This Action Plan includes many marketing initiatives, but concentrates primarily on product development, which is by far the most important focus first. When you reach this point in the implementation of the plan, you should develop a detailed marketing, advertising and public relations budget and media buy program, and it should include the following elements:

- Increased digital marketing including SEO initiatives (use the budget outline contained earlier in the recommendations: 45% spent on digital marketing)
- Print advertising
- Billboard and outdoor advertising
- Radio
- Television (during news broadcasts on mainstream TV. Avoid cable advertising)

- Trade shows (wedding fairs, travel shows, home shows, flower and garden shows) in the greater Calgary market area.

Meanwhile you can begin by purchasing print ads in regional magazines.

An important rule of advertising is to find your audience and then hit them over and over and over again until you stick in their minds, and that's exactly what this does. In this case, run perhaps three or four seasonal ads for ten months in a row. You want the same messaging, but perhaps a different graphic or photograph. If you need expertise in designing these ads, please have the RBI team or an ad agency prepare them for you. And keep in mind that you are not promoting Okotoks. You are promoting the experiences, which happen to take place in Okotoks.

Insider tip: Always work to get equal editorial to match your ad space. In other words, if you buy a two-thirds page ad, get two-thirds of a page in editorial. While they might not provide editorial every month, perhaps they would do a three or four page spread about the incredible Okotoks downtown story in a single issue. Always leverage your advertising with editorial. Then order reprints of the article so you can post them on your website and can include them in relocation packets and other marketing efforts like business recruitment.

Another thing to do is to obtain "Editorial Calendars" from regional publications for 2019 when they come out. Editorial staff meet and plan what the feature articles or topics will be for the next year. Perhaps they would feature Okotoks and if so, you want to make sure Okotoks is at the table and is included in the editorial as well as in an ad.

And finally, remember ads must be committed two months before the publication date. For instance if you want to be in the March issue of a magazine, they will need the commitment and the art work early in January if not late December. The March issue is printed and distributed typically mid to late February.

## **60. Contract for professional video and still photography**

**Timeline:** Summer 2019

**Who takes the lead:** Downtown Tourism Marketer

**Approximate cost:** \$30,000

**Possible funding idea:** Possible BRZ funds

**Rationale and/or details:** Before development of an updated Okotoks website, or downtown website, arrange for professional video and still photography. We are in the age of visual communications. You can work with a nearby university photo and video education department, or contract for professional photography and videography – but the key is having great content and high-definition resolution. Your photos need to be world class – like you'd expect to see in a National Geographic publication.

Videos, on the other hand, need to be more artsy and don't need to be overly polished. The idea is to sell great experiences that are totally different from what the visitor can get closer to home. They need to fit within the framework of the Brand Style Guide – the look and feel of your brand. Photos and videos should be festive, fun, and engaging. The focus should be on people having a great time in Okotoks. This is about experiencing the events and creative driven atmosphere Okotoks will offer. Everything you film and shoot should portray that feeling.

You can reduce costs by assuring the photographer that the images will only be used by local non-profit organizations and/or the Town of Okotoks to promote the downtown and the area, and by including photo credits. You can also include a website address promoting the photographer. This way you create a reciprocal relationship. Consider having a page on your website dedicated to the photographer.

Make sure your videographer also has studio skills. You'll want to create a number of 20-second to two-minute videos, every season of the year, promoting great experiences. This means videos may need to be edited and formatted for use on YouTube, your website, and other online sites.

Develop a knock-your-socks-off B-roll library of video and perhaps 100 signature photographs, keeping in mind:

- The photography and videography MUST fit within the Style Guide requirements and recommendations.
- Always focus on people having a great time. Especially at play and scheduled events. Don't show just scenery – show the visitor in action. People – not objects. People see themselves where they see other people. Always sell experiences, not just places, not just objects. We want to see people, not pictures of empty parks. For example, instead of a photo of a festival, use a photo of a photographer taking a picture of a festival.
- Keep the photography tied to the core brand promoting the Okotoks lifestyle.

Make sure you watch the Roger Brooks video in the All Access Library "The Use of Photography to Increase Sales." This will be a great primer for your efforts in securing and using world-class photography. A photograph really IS worth a thousand words.









# *Supporting Documents*

## SAMPLE STREET PERFORMER GUIDELINES

No person shall perform in a public area without a permit from the Main Street Manager. The permit must include the name and address of the performer, term of the permit, and the type and location(s) of the performance. A performer shall clearly display his or her permit while performing and allow inspection of the permit by any city official or police officer. All performances must comply with this document, state and local laws, and conditions of the permit. Permits are not transferable and each member of a group who performs together is required to obtain an individual permit.

Every person wanting to engage in street performance is required to make a written application for a Street Performer Permit from the Main Street Manager accompanied by a \$10 fee. The application form requires the following information:

- Applicant's name, address, and phone number.
- Birth date of applicant.
- Applicant's driver's license or personal identification number.
- A description of the subject matter and method of performance.
- The period for which the permit applies.
- The location of areas in which the performance will be conducted.
- A statement as to whether the applicant has ever been convicted of a felony.
- A 2x2 inch colour photo of the applicant's head and shoulders.
- A signed permission slip from the property owner, if performance is to occur on private property.

## RULES & REGULATIONS

### **Location:**

Performances may take place in the following locations:

- a) On private property, with the written permission of the owner or other person in control of such property.
- b) In public areas designated by the city.

### **Time:**

Hours during which performances may occur are determined by the city.

### **Contributions:**

Performers may accept, but not verbally solicit, contributions from audience members.

### **Prohibitions:**

No performer shall:

- a) Perform without first obtaining a permit.
- b) Perform outside areas indicated on the map that accompanies this document or off the private property for which the performer has obtained written permission.

- c) Perform within 10 feet of any bus stop, street corner, pedestrian crosswalk, or the entrance to any business (during hours the business is open to the public).
- d) Block or obstruct the free and safe movement of pedestrians. If a sufficient crowd gathers to observe a performer and interferes with public passage, a city police officer may disperse that portion of the crowd that is blocking passage.
- e) Use any knife, sword, axe, saw, torch, flame, or other object that can cause serious bodily injury; any amplification device; any generator, battery, or power source that poses a fire or public safety hazard; any electrical connection to an adjacent building or city power source.
- f) Leave litter at his or her performance site.
- g) Utilize or prevent the public from using any public benches, waste receptacles, or other street furnishings during his or her performance.
- h) Place any object on a public sidewalk that leaves less than a five-foot passage for pedestrian traffic.
- i) Place his or her instruments, props, equipment, or other items unattended on a public sidewalk or right-of-way.
- j) Offer any items for sale. Performers who wish to sell items must first obtain a city peddler's license.
- k) Display any sign other than the name of the performer(s) and the Street Performer Permit.
- l) Include a minor under the age of 16 in the performance unless accompanied at all times by a responsible adult 18 years of age or older.

#### **Revocation Of Permit:**

A Street Performer Permit may be revoked by the city if the Main Street Manager has reason to believe that a performer has:

- a) Violated any provisions of this document or any city or state laws.
- b) Made a false statement in the application.
- c) Conducted a performance adverse to public safety or prevailing community standards of public decency.

#### **Complaints And Appeals:**

If a written complaint is filed with the city alleging that a performer has violated any provisions of this document, the Main Street Manager shall promptly send a copy of the written complaint to the performer, together with a notice that an investigation will be made regarding the truthfulness of the complaint. The performer will be invited to respond to the complaint, present evidence in his or her behalf, and respond to evidence produced by the investigation. If, after reviewing all relevant material, the MS Manager finds the complaint to be valid, the complaint shall be certified.

If a permit is denied or revoked by the Main Street Manager, or if a written complaint is certified, the permit holder may appeal to a hearing before the City Manager. After presentation by the permit holder and investigation by the Main Street Manager, the City Manager shall make a final written determination. If the City Manager decides in favor of the Main Street Manager, the applicant may appeal the decision to a court of jurisdiction.



## ADDITIONAL BRAND GRAPHICS



Ad Layout  
Concept

*Designing their future starts right here.*

Failure is a part of innovation – perhaps the most important part. In beautiful Okotoks, just 30-minutes south of Calgary, we embrace the notion that failure is absolutely critical to success. After all, the world's greatest innovators had dozens of failures before they discovered that one thing that changed the world. Here we firmly believe that the best investment a community can make is in its youth. We focus on innovation, creativity, and inspiring our kids to design an incredible future for their kids and future generations. To join the innovation, visit us at [JoinTheInnovation.com](http://JoinTheInnovation.com) [www.JoinTheInnovation.ca](http://www.JoinTheInnovation.ca)

**Okotoks**  
ALBERTA  
*Join the Innovation*







## *It all began with a rock.*

Located just 30-minutes south of Calgary is an amazing site. Ten thousand years ago the ice melted leaving an amazing erratic: A16,500 ton rock, 41 metres long: Named The Okotok by the Blackfoot Nation, Okotoks is still building on that amazing beginning. But today, Okotoks is known for its innovation and creativity: building a better world for the next 10,000 years. Isn't it time you built your future in Okotoks? Rock solid for the next 10,000 years. To build your foundation, visit us at [www.JoinTheInnovation.ca](http://www.JoinTheInnovation.ca)

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ALBERTA  
*Join the Innovation*







# Run for your life!

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## *The fusion of creativity and innovation.*

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## *We'd like to thank the Academy...*

Just 30 minutes south of Calgary in the stunning hills and along the Sheep River is a place so special, so innovative and creative that the world is taking notice. And the display cases are filling with awards. How about the "Emerald Award for Climate Change," the "Harnessing the Sun" FCM award, the "Leadership in Sustainability," and "International Awards for Livable Communities." Want more? "The greenest community in Canada" award, and a long list of awards for water conservation, transportation and even neighbourhood development. Designing the future is what we do, every day, and we'd love to have you join us. We're always looking for creative, innovative change-agents and companies that, like us, are focused on designing and building a better future.



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*A different kind  
of investing goes  
on here.*

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[www.JoinTheInnovation.ca](http://www.JoinTheInnovation.ca)

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## *Healthy living is in our DNA.*

We can't help it. It links to our DNA. It's why we live here. And work here. And absolutely love it here. Why? Our connection to country living, clean air, and clean living. You see, we are 100% dedicated to building a future of healthy living and a robust, healthy environment for our kids and their kids and for future generations. We love living at the intersection of innovation and creativity. This is exactly why you need to plant roots in the beautiful and inspiring Okotoks. It's in your DNA. Learn more at [www.JoinTheInnovation.ca](http://www.JoinTheInnovation.ca)

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*Sometimes the  
best things in  
life are free.*

Quickly becoming the poster child for amazing downtowns, The Link District in downtown Okotoks is home to an outstanding collection of boutique shops, eateries, and Alberta's best year round public market. But the tie that binds is the stunning Innovation Plaza, home to 300 activity-filled days each year. With an almost endless number of activities from rock climbing, ice skating in season, giant splash pad and water shows each summer, to music, magic, and mesmerizing shows of every sort, there may not be a better place in Western Canada to connect to laughter, fun, excitement, and each other. To see what's happening tonight, log on at [www.TheLinkDistrict.com](http://www.TheLinkDistrict.com)

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Business Paper Designs

The Link District Brochure Cover



Full Okotoks Logo Set



Okotoks Alternate Mark



Reverse Okotoks Alternate Mark



## 7-Question Itinerary Exercise: Engage your locals in creating “itineraries from our local residents”

- Great idea for a public gathering, such as Kiwanis, Rotary, etc.
  - Use blank sheet and ask a series of 7 questions
  - These are examples and can be changed to suit the season, location and other particulars of the itineraries you are creating
1. Where will my partner and I have the best dining experience?
  2. Where should we go for some nightlife?
  3. Where can we get gourmet items for a picnic?
  4. What is the one thing we MUST do while we are here?
  5. Where can I get the best dessert? Name the place AND the dish.
  6. Where can I take the best picture that says I was really there?
  7. Where can I get something locally made? A gift or great souvenir?
- Then ask the participants to number them in order – this builds the itinerary
  - Notice: five of the questions are about private industry

# Roger's Video Library

## Recommended Viewing Order

**First start with community branding. You need to figure out what you should be known for that will set you apart from the rest.**

1. The Art of Branding a Community - Part 1
2. The Art of Branding a Community (Roger's 13-Step Process)
3. Finding Your Niche: Not So Easy, Is It?
4. Big Success Starts with a Plan: Creating Your Own Action Plan
5. Getting Everyone on the Same Page, Pulling in the Same Direction
6. Rebranding Success Stories

**Next, focus on downtown development/tourism development. What is the product that will reinforce your brand?:**

7. The 20 Ingredients of an Outstanding Downtown - Part 1
8. The 20 Ingredients of an Outstanding Downtown - Part 2
9. The 20 Ingredients of an Outstanding Downtown - Part 3
10. Downtown Critical Mass
11. Business and Community Signage
12. The 70% Rule: Curb Appeal and First Time Sales
13. Year-Round Public Markets
14. The Power of Public Plazas - Part 1
15. The Power of Public Plazas - Part 2
16. The Art of Developing a Wayfinding System
17. Is Your Downtown Open After 6pm?
18. How to Bring Your Downtown to Life
19. Parking is Not Just for Lovers
20. Recruiting Tourism Development Projects
21. Visitor Information Centers in the Digital Age

**Finally, watch community marketing videos. How will you tell the world you exist?:**

22. Seven Deadly Sins of Destination Marketing
23. Words & Phrases That Work Every Time
24. The Truth About Social Media
25. Tourism for the 21st Century
26. Community Marketing on a Minuscule Budget
27. The Power of Itineraries
28. The Use of Photography to Increase Sales
29. The Power of Selling Experiences over Places
30. Promoting Your "Anchor Tenants"
31. How to Create Marketing Partnerships
32. Designing Effective Print & Mobile Ads
33. The Death of Visitor Guides and What to Do Instead
34. Multi-Generational Travel



**ROGER BROOKS** >  
International

Roger Brooks International | 24654 N. Lake Pleasant Pkwy, Suite 103-487 | Peoria, AZ 85383 | 206-241-4770 | [www.RogerBrooksInternational.com](http://www.RogerBrooksInternational.com)





Roger Brooks International, Inc.  
24654 N. Lake Pleasant Pkwy, Suite 103-487  
Peoria, AZ 85383  
206-241-4770

[www.RogerBrooksInternational.com](http://www.RogerBrooksInternational.com)