

Terms of Reference

America's Metal Industry Sales & Marketing Plan Development

1. Background

The America's Senior Sales Management has recently reinforced the strategic importance of taking a fresh view of the Metal industry Market in the Region. With the Growth and Profitability Goals of the Region over the next period(s), it is critical to ensure that all opportunities, threats, and challenges are clearly understood and addressed. It has been decided to undertake a short, focused activity to look at the Metal industry market with a view over the next 3-5 years and define what the company needs to do to be successful within this market. The prime deliverable will be a Sales & Marketing Plan This document sets-out the terms of reference of this program.

2. Objectives

The program objectives are:

- To Create a clear understanding of what the Metal industry outlook is for the next 3-5 years, and
- To Determine the implications on The Company's revenue opportunities.
- To Develop a recommended set of Market Strategies and Execution Programs for Metal industry that supports the overall America's Goals & Objectives with specific actionable activities.

3. Methodology

- The Activity will utilize a team composed of representatives from Sales, Sales Leadership, Marketing, Competitive Analysis, and the Delivery group(s) to achieve a broad understanding and perspective.
- As a Base, the Team will take advantage of material relating to previous Business Plans and studies.
- Weekly teleconferences will be used as a primary communication approach with two (2) face to face meetinthe company to facilitate obtaining closure and development of team recommendations.
- We will use an iterative development approach whereas specific topics, issues and opportunities will be developed from a macro view and then

additional “meat” will be added as each area is more fully developed. Multiple areas will be iterated in parallel.

- Many of the team members will be asked to “Lead” a particular area and/or topic.
- The activity is expected to transition into an Execution Program commencing in the second quarter next year. There could be instance(s) where some programs and activities are commissioned earlier.
- The prime deliverable will be a consolidated Metal industry Sales & Marketing Plan by March 31, 2024

4. Project Deliverables

- An America’s Metal industry Sales and Marketing Plan covering 2024-2025 with a 5-year outlook
- Identification of market opportunities and threats that impact THE COMPANY
- Definition of strategies, programs and tactics that provide THE COMPANY with a clear market approach & differentiation
- Creation of an implementation approach, priorities, and investments covering the next 18 – 30 months.

5. Project Milestones

- Weekly Teleconferences Through March 31st
 - These teleconferences will address Specific Topics as follows.
 - Market Situation analysis
 - Competitive Analysis
 - Client Requirement Development
 - Our Current Capabilities Matched Against Client Requirements
 - Gap Analysis of Requirements vs Capabilities
 - Impact/Implications on THE COMPANY America’s
 - Development of Strategic(s) Approach
 - Creation of Programs Against Strategies
 - Investment Profile/Priorities for Programs
- February 19
 - Interim Review/Update with COO
- March 31
 - Recommendations to Leadership Team

6. Budget

- This budget assumes a ten (10) week duration of the team.
- It also assumes constant participation by all team members.
- Average weekly time per individual is estimated to be four (4) hours per week.
 - This includes material review and teleconference participation
 - It is assumed that the team is made up of eight (8) FTE's with the Delivery Group counting as one (1) FTE
 - Development time will vary considerably with the following being a first pass estimate
 - Market Situation analysis 16 WM
 - Competitive Analysis 8 WM
 - Client Requirement Development 8 LS/JC
 - Current Capabilities vs Reqts 16 DG
 - Gap Analysis of Requirements vs Capabilities 16 DG/MV
 - Impact/Implications on THE COMPANY 12 LS/MV
 - Development of Strategic(s) Approach 16 LS/DY
 - Creation of Programs Against Strategies 24 S/JD
 - Investment Profile/Priorities for Programs 12 LS/AG

Total 60 effort days

7. Team Composition

WM, LS, MV, JC, DG, DY, S, AG

8. Executive Sponsor

- PR