



**Anthony & Sylvan Institute**

1150 Emma Oaks Trail, Suite 140  
Lake Mary, FL 32746

(407) 804-6200 ~ (407) 833-9376 Facsimile

# MEMO

License # CPCO18308

**To:** Bill Evanson  
Ken Sloan  
**From:** Heather Wolfe, Training Center Coordinator  
**Date:** 13 December 2002  
**Re: Training Center Rental Timeline**

- Identify Conference Centers/Training Facilities in the area.....Jan 1
  - Yellow Pages
  - Internet
  - Word-of-mouth (hotel, catering and transportation service contacts)
  - Lake Mary Chamber of Commerce
- Target Companies listing .....Jan 1
  - A&S partners
  - NSPI
  - Yellow Pages
  - Internet
  - Word-of-mouth (hotel, catering and transportation service contacts)
  - Lake Mary Chamber of Commerce
- Layout A&S Training Schedule for 2003 ..... On-going
  - Sales .....locked in
  - Project Managers .....locked in
  - Retail Stores .....locked in
  - Leadership Conference .....
  - American Lung Assoc. ....locked in
  - Other .....
- Estimate operating and income budgets ..... Feb 1
  - Expense analysis
    - Base Rent.....\$19,209
    - Supplies
    - Catering Service
    - Transportation
    - Utilities
  - Package inclusions and cost
  - Light-box Advertising
    - EBI to forward production costs and turn around times
- Identify facility upgrades .....EBI researching quotes
  - Divider Wall
  - Distribution box for A/V Equipment
  - Additional Microphone
  - Stanchions and chains for pool and equipment pad
  - Light-box issues
  - Fix floor jacks throughout training room
  - Circulation issue in Data room
    - Cut vent in door
    - Muffin Fan ceiling vent
    - Additional/larger return



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- Prepare Capabilities Brochure with pricing ..... Feb1
  - Research advertising for comparable centers in area
  - Photos from Marketing Group/EBI/Heather
  - Production: in-house/EBI/Marketing Group?
  
- Determine contact method ..... with target companies Jan 1
  - Anonymous contact with target companies to determine contact person
  - Business Reply postcard
  - Business Reply email
  - Local newspapers, business journals
  - Chamber of Commerce
  - Word of mouth
  
- Develop Contract (with Legal) and Terms .....consult Legal after Feb 1 budget developed
- Notify insurance carrier of 3<sup>rd</sup> party rental activity ..... Jan 15
- Equipment Maintenance ..... Jan 15
  - Annual maintenance
    - Air Conditioning
      - Upgrade Fan Belt Motor
  - Operation/Instruction Manuals.....in Jack’s office? A/V Cabinet?
- Coordinate Facility upgrades..... as needed by March 1
- Develop Accounting requirements .....with Budget Feb 1
  - Bank account.....Orlando Petty Cash Account
    - Balance to keep?
  - Checkbook.....Orlando Petty Cash Account
  - Credit Card
- Grand Opening ceremony (for 3<sup>rd</sup> party guests and city officials).....March 1