New Business Opportunity

**Company Description:**
One of the five largest bank corps in the US. The company operates over 3,000 banking offices in 25 states and over 5,000 ATMs and provides a comprehensive line of banking, brokerage, insurance, investment, mortgage, trust and payment services products to consumers, businesses and institutions.

**Short Project Name:**
New Prepaid Product Launch Analytics

**Project Description and Deliverables:**
We introduced "ZZZZZ", a reloadable prepaid card where customers can load funds in the branch, via direct deposit, or from their checking accounts. It was rolled out to all branches. The product has been wildly successful, far better than anticipated. We plan on upgrading the product to one with more flexibility and customer features. We do have concerns how to make these upgrades without disturbing the momentum we currently have. (Information on this project will need to be handled confidentially).

Project will address two issues:
1) Banker feedback, looking at effectiveness of training, understanding of product, ability to explain to customer, and sales experience.
2) Customer feedback, looking at ease of understanding and use, whether new functionality is understood and utilized.

Project will entail the following:
1) Creating short surveys (5-10) questions targeting bankers and new customers.
2) Our firm providing weekly list of bankers who sold new product and weekly list of new customers.
3) Manage contact of bankers by phone within week of sale. Manage contact of customers 2 weeks after sale.
4) Survey data collection, reporting, analysis. One question to resolve is who performs the actual calling, and if this is an additional expense, and if BYU has the call center capacity to perform these. Anticipated volume is only 20-30 calls per week.

**Key Deliverables**
1) With our assistance, compilation of two separate survey questionnaires 2) Weekly call feedback 3) Mid project summary (March 1) 4) Final call results 5) Final project report and analysis

**Company Description:**
A billion dollar, middle market private equity firm. We just closed on a new fund and are anxious to put our fresh capital to work. We focus our investment on a wide spectrum of industries and sectors ranging
from consumer products to healthcare, light manufacturing, and distribution and has consistently achieved top-quartile returns for its investors.

**Short Project Name:**
Investment Diligence Team

**Project Description and Deliverables:**
We envision the BYU team working closely with our investment professionals to conduct research to contribute to our investment theses.

This project will be at the heart of the private equity industry: analyzing new investment opportunities. We recently closed its ### buyout fund with a total of $$ million in equity capital. With this fresh capital, we are excited to find great investment opportunities and are scouring the universe for the best opportunities. We are continually reviewing and analyzing new opportunities, industries, and sectors and are in need of extra research and diligence. We view the BYU opportunity as a great way to fill this need while providing the students with a first-hand experience in private equity.

The BYU team will report directly to ZZZZZZZZ associate. He graduated from BYU with a B.S. in Finance. He will be in close contact with the team as he gives them instructions and follows up with them on their work. General work description: Conduct primary research: including phone interviews, surveys, and store visits Conduct secondary research: including web searches, database and industry report analysis, etc. Perform valuation comparisons: pull trading and transaction comps from relevant databases. Assist in valuing new deals and marking to market current portfolio.

Key Deliverables
Each week will likely have different, small research projects as new deals come across our desks every day.

**Company Description:**
A national engineering and sales organization of radiant heating systems. We work with a wide variety of home owners and building professionals and sell professionally designed radiant heating systems throughout North America.

**Short Project Name:**
New Product Roll-Out

**Project Description and Deliverables:**
We are looking to further expand our business by offering a new line of products, LED lighting, either under our brand or another brand.

We are interested in the student team analyzing this opportunity and providing recommendations relative to this initiative, including providing the following services.
1. Analysis of the market potential of LED lighting in the US
2. Analysis of the current industry status as well as future trends of the LED industry
3. Analysis of government programs related to LED lighting
4. Analysis of the current competitors and their LED offering (main channels of distribution, unique selling propositions, products offered, etc.)
5. Identify at least 10 target markets within the LED lighting industry (examples, municipalities, governments, educational institutions) as well as the key selling proposition to each of these target markets (cost savings, LEED points, energy efficiencies, etc.)
6. Suggestions for marketing plan and materials needed to effectively compete in this industry.
7. Develop a marketing plan and materials needed to effectively compete in this industry.