



# MUSEUM 2020

BUILDING THE FUTURE AND AVOIDING EXTINCTION

**SĀGIN, LLC** 

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*"A value driven management consulting firm"*

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## Overview

The market sectors of museums, education, arts/entertainment, hospitality and non-profits are impacted by technology, consumer trends and behaviors which affect their operations. One year ago SAGIN embarked on a study to understand the trends and behaviors of consumers and the market so organizations can better plan and build for the future. Many studies focus on key industry specific metrics or survey institutional leaders and analyze their strategic decisions. We recognize that people and consumers make decisions every day: where to shop, how they communicate, where they spend their time, and the list goes on. We have set out to create a research paper that analyzes consumer trends to compare and contrast this data with the decisions of executives to arrive at some best practices museums and other institutions can use to support their strategic decisions for the future. Our study combines consumer data over the past five years as well as looks at museums such as: The Smithsonian, Guggenheim, MoMA, British Museum, etc. We also looked at best practices used by leaders in the arts and entertainment industry such as: MGM, Disney, Universal Studios, Sony, etc.

The goal of this research was to shed light on the challenges facing museums and non-profits striving to educate, preserve and learn as well as share information for the improvement of our future. It is our hope and intent that this report can provide valuable insight for executives and key decision makers to use as they make informed decisions and continue their vital work contributing to our society.

## Challenges

Since the time of the first agricultural machines, to the automobile and train, personal computer to the cell phone, inventions and technology have transformed our lives. The cost of the first color television was ten times what you can purchase an HDTV flat screen today. Although the cost of technology continually declines and the time it takes to manufacture a product decreases, the value keeps increasing with the one thing we seem to have less of, time itself. It is funny to think with all of the inventions and technology designed to make our lives easier, we seem to have less time in the day. This is because the competition for our time/attention has increased dramatically.



Web searches actually consume more time finding the “useful” information you were looking for. Texting has become a convenience and an addiction.

Social networking now consumes a vast amount of time. According to Facebook, its 1.23 billion users log on for an average of 17 minutes per day. What is more astounding is those users age 18-34 average 3.8 hours per day and 35-49 year olds average 3 hours per day. Do you remember what you did before Facebook? We cannot change this reality, but we must adapt or evolve to survive.

Museums are now in an ever increasing world of competition for time. Whether a potential guest is an out of town family of four, or someone from their own community, the competition for their interest is intensifying and their availability of time is diminishing.

Another challenge brought on by technology is the accessibility of data and information from all over the world, from text to high resolution photos and video and streaming real-time shows and images. Museums which were once thought of as a source of information have had the carpet pulled out from under them because that information can be retrieved from the comfort of one's own home on a screen.

Organizations that are blinded by the paradigms of the past will be fighting for their very own survival. Fundamental shifts in thinking are required to adapt to a new consumer base. From 2002 to 2012 museum attendance dropped 5 percent. The only age group that experienced an increase in attendance was people 75 years of age or older and that is only perhaps because people are living longer (National Endowment for the Arts). Organizations need to understand new generations of consumers like Millennials to maintain top lines, ticket sales, attendance and contributions.

By 2017 Millennials/GenY will reach approximately \$200 Billion in annual spending. However it doesn't stop there. This generation is being promoted faster and with the increased growth in the number of companies this generation is holding the purse strings of company spending. Baby Boomers are retiring and their spending is on the decline. The GenY generation, those born between 1980 and 2000, is the largest growth generation since the Baby Boomer. This generation doesn't know the meaning of a home phone that is a land line or what life is like without a broadband connection.

Forbes highlighted five key traits of Millennials:



1. Technology must work and it should be mobile, where ever and whenever they want it.
2. They socialize while they consume either on-line or in real life. They will post a question on-line asking opinions before buying a ticket or seeing a show and if they don't like it, beware of the hashtag (“#”) because they will let everyone know of their dissatisfaction allowing anyone these days to be a critic and a publisher.
3. Generation Y and Millennials collaborate and cooperate. They want to be seen as contributing to the greater good.
4. They are looking for adventure in whatever comes their way. They want to travel and experience. They like the thrill of experiential events and are also adventurous in their dining.
5. They are passionate about their values and who they do business with. They place a premium on organizations with values. Organizations also need to recognize that Millennials and the younger generations are not only consumers but could be co-workers as well.

The challenges are further complicated by the increasing diversity of the population. A majority of regular attendees at museums and art events are caucasian/non-hispanic, have college degrees and median incomes of greater than \$75,000 per year. However, the demographics of the U.S. are becoming inverse

of this example, further demonstrating the challenges museums face in attracting future attendees and contributors.

The Millennial viewpoint further emphasizes the importance of these numbers because Millennials value inclusion and collaboration and do not view things through a myopic lens.

## Be Relevant

We understand that each organization has its own intended mission and purpose. For example the museum of air and space, contemporary art or an aquarium all have their explicit purpose; however they still need to be relevant. In the competition for time, each consumer subconsciously and continuously asks themselves how is this relevant to me and my life? Today we filter information more than ever before because we have to. If we didn't we wouldn't have enough time in the day to read and see everything presented to us. We filter our choices based on what is important to us. These choices are influenced by social media and friends, if they "liked" the choice we were about to make or have visited that place before. Let's face it, not only does something need to be relevant, but it becomes bragging rights and self-promotion of "I was there", "I bought this", "and I saw that" and "I checked-in here". In a study performed by AdWeek, 74% of consumers rely on social media to influence their buying decisions and 81% are influenced by their friends' posts on social media. As consumers we want to be heard and have a voice.

Even though museums have an intended and explicit purpose, they continually have to demonstrate how they are relevant to their intended audience by linking exhibits,

performances and demonstrations to current events and interests. Consumers now want an interactive experience.

What does a pop music star have to do with contemporary art?



Every bit of the Bowie exhibit is artistic especially for the demonstrated record breaking 193,000 people visiting the exhibit on its 15 week opening at Chicago's Museum of Contemporary Art. The exhibit's only showing in the U.S. titled "David Bowie Is", not only brought historic attendance, but also the highest sales of merchandise in its store. The linkage of the age of people who experienced the artist's music first-hand during the height of his music career, to the current Millennials who can relate to the boldness and avant-garde nature of the artist is the key to its success. All of these different experiences coming together created the relevance of this exhibit with many of the attendees.

Organizations must learn to evolve and adapt to create the form of relevance in today's new age. The Joffrey Ballet is one of the world's most well-known ballet companies, performing

a repertoire of classical masterpieces. Although ballet is a classical art form, the leadership and artistic directors of the company realize the need to integrate new contemporary pieces of cutting-edge works. This creates a form of relevance, turning the classical artistic expression into a contemporary work of art. Maintaining relevance bridges the gap of generations and creates a link to the everyday lives of your audience.

Even classical orchestras like the New York Pops has integrated music from the Beatles, Frank Sinatra and even rocker Storm Large. Relevance can be brought about by creating a bricolage of classical with contemporary creating a whole new perspective and hence drumming up a new, rich interest in the organization.

Creating relevance is defining the targeted audience and creating content which attracts, acquires and engages the intended target. For an example, a scientist at Carnegie Mellon studying the impact of supplementing standard language with numeric values to clarify uncertainty is not as exciting as applying this research to climate predictions and global warming which is being done at the university in a current study. All too often the valuable and important research being conducted needs to be translated to society so the intended audience can relate and understand its relevance. This is further enhanced when you transform it into an actual experience and allow others to participate in that experience.

## **Walk Through Walls**

Museums can be architectural marvels and destinations in their own right but the beauty and engineering isn't the only thing that makes

them great. To be great, they know that they cannot limit themselves to the boundaries of their great walls and design. World class museums and learning institutions have expanded to a virtual environment. This concept can be applied in many different ways from the sharing of data and information, to collaboration around the world. A building cannot easily be moved but ideas and people can. The American Alliance of Museums in their *Trendswatch 2015* publication placed a significant emphasis around the growing trend of "open data". The concept stems from allowing access to data and information so that users around the world can virtually create new solutions, formulas, products and hypothesis. The potential for creation can be endless.

We cannot dispute the trend for the open access to data and information, but in our context of "Walking through Walls", we not only want to bring participants into our virtual world, but we also want to reach out. This is where we start to see the concepts of our research to begin to take shape and come together. Once an institution has begun to define its target audience and determine the factors of relevance, it can then begin to tailor its own unique and proprietary information, collections, media and valuable research to begin allowing access virtually and reaching out to their target audience, wherever and whenever they want it.

This is being done in the profit and non-profit space by appealing to audiences through multiple forms of participation and viewing, such as videos, live streaming of events, gaming and virtual classrooms. Some of the outreach programs can even create added forms of revenue with advertising and creating on-line classes. At one time a museum was viewed as a



line or if you don't have a Mona Lisa or a giant Woolly Mammoth, then you might not have provided them with the experience they expected. Reading signs with small print in a crowded exhibit is frustrating and time consuming.



Worse yet, if after all the attraction, advertising and hype and they are still disappointed you could be faced with the dreaded hash-tag (“#”), yelp and Facebook post. Feedback is instantaneous and can have the potential to become tsunami social media blasts. This is a primary reason why major corporations with strong brands serving large consumer markets continuously monitor public opinion and social media postings. Social media is a double edged sword that cuts both ways.

There are two major aspects of creating an experience for the visitor. One is the exhibit itself and the second are the services and experiences that surround it.

Whether repurposing an older exhibit or creating a new one, the first element of success goes back to relevance. Just as a museum has to compete for time to attract a visitor, it also must compete for time in our ever dwindling attention spans and filtering minds. We are becoming more and more visual thinkers due to the media and images that we are bombarded with today. According to Linda Kreger Silverman, child development theorist, only

25% of the population think exclusively in words. The remaining 75% process their thinking in a combination of visual and spatial thinking. Hence, a museum equipped with small written signs in a crowded room will disappoint a great number of visitors which want to hear, feel and view their information rather than read it on a small sign.

The challenge has become, how can a museum afford so many digital displays, wiring and content creation? The traditionalist is concerned with the interference, noise and disruption it would cause in a peaceful setting such as an art gallery. The latest answer is the Bluetooth Beacon. Currently being tested in a



number of museums including the Neue Galerie in New York and the List Visual Arts Center at M.I.T. Bluetooth Beacons are a way of communicating and transmitting video and sound

to a Bluetooth enabled device, such as a smart phone or tablet. No longer do you need to stand in line retrieve your headset and push the numbered buttons to corresponding sign numbers to hear the audio. Bluetooth beacons will allow the visitor to walk right in, and based on proximity, will automatically allow the user to listen to the audio or even watch a video of how the artifact was discovered or restored. The user can even “like” the video, comment or post where they are providing instant feedback to the museum and the outside world further promoting the exhibit. In addition to technology and ease of use of the beacon devices (which are hidden and incorporated into the surroundings) there are no loud big screens disrupting the environment, as many visitors will be using their own devices and head phones.

In the near term, some museums will still need to provide some Bluetooth devices for those without their own equipment, which can be used through-out the museum.

Bluetooth beacons are a new technology, but you can even leverage your existing wireless networks to provide some level of traffic pattern visibility. For example, organizations deploying Cisco's Meraki wireless networks can not only significantly improve the quality of their wireless networking but provide valuable feedback on the number of users and traffic patterns in the building.



Using heat map capability you can assess real-time which areas are more densely visited and the length of stay. You can further leverage this network to send instant messages to the devices on the network for promotions and specials to better balance the crowd, entice people to lower traffic areas or potentially increase revenue in a café or gift shop.

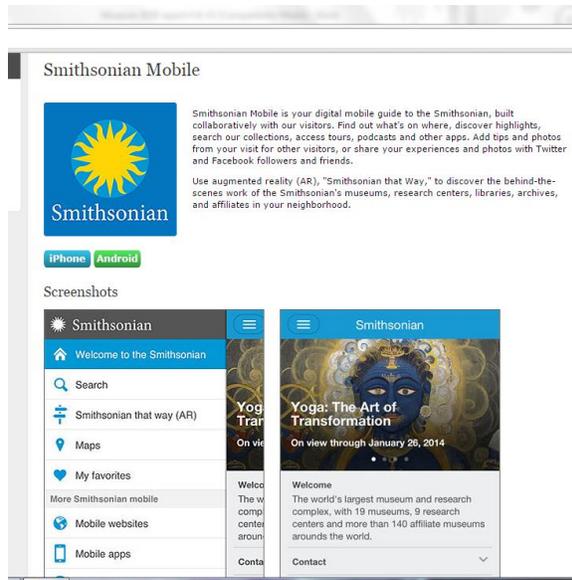
This leads us to the second important element of the experience, which is the wrapping of services around the main attraction or reason for their visit. Any services, from easy directions and navigation to concessions, to ease of parking to the flow of crowds, all help to enhance the experience. However, piggybacking on the beacon technology we can

not only transmit audio and sound to the user, we can also track their every movement. Museum maps can be digitally transmitted to the visitors' device, payment for tickets and shows can be made in advance and scanned for entrance to the venue or theater just like an electronic airline ticket. Visitors can receive updates about when the next show will be seating or prompted with specials or discounts at concessions, or the gift shops to increase sales. In addition, registered users of the museum app can provide valuable information to museum marketing with the number of subscribers in the museum, who is a "VIP/Platinum" member, how long was their visit, what did they see and buy.

Ultimately, we are seeing a consolidation of technology from multiple platforms of hardware, software, scanners/readers, displays and turnstiles down to one device.....the smartphone that the visitor brings with them.

The connection to the visitor becomes the application which resides on their own hardware.

The Smithsonian smartphone app allows user to perform a multitude of functions from podcasts to tours, to making a contribution.



The app is not yet leveraging beacon technology but it does offer a rapidly growing concept of augmented reality to enhance the visitor's experience.

Augmented reality brings an exhibit to life by putting skin on a dinosaur, or transforming an old object to what it would look like in its original state. This technology can bring an exhibit to life. Just short of Google glass and virtual reality, augmented reality allows the user to point their tablet or smart phone device on an object and watch the display as it comes to life.



Walt Disney said, "I don't want the public to see the world they live in while they're in the Park. I

want them to feel they're in another world." As you can see, the experience can be greatly enhanced, even to a demanding Millennial, and it doesn't take a budget like Disney World to get it started.

## Focus

We cannot be everything to everyone because if we could, we would all be uninspired and stay home. Success comes in knowing what you're good at and there are some basic practices that come with the operations of a museum.

Utilities, concessions, technology, security and maintenance are all standard areas of operation with a building, however not necessarily core to the research, creativity and delivery of the organization's mission and purpose. Many organizations have already outsourced certain aspects of their operations that can be better managed and delivered by professionals who specialize in that area of focus. This allows the executive leadership to better focus and execute on its mission and purpose for the museum itself.

We have learned from the new generation that, with any experience comes eating and entertaining. When was the last time you saw a photo of a friend's meal online after they checked into a new restaurant? The fact of the matter is, that consumers want choices, they value their brands and what they eat is just as important as what they wear and where they go.

Food preparation, sanitation and delivery is not always a core competency to operating a museum and actually can create a distraction from the core mission if managed internally. In some situations, if a museum or artistic venue

offers a very unique form of architecture it can also be a big revenue generator for event space. Fundamentally, catering and organizing an event for 500-1,000 people or preparing food in a restaurant or concession should be left to the experts. Heavily branded concessions such as Wolfgang Puck and various notable chefs find museums attractive for their unique venues and captive audiences. Potentially even more inviting if they can operate post museum hours with a separate entrance for their restaurant.

With the advances in technology, communications, climate control and utilities it's getting harder and harder to keep up. This is where outsourcing can come into play, as these areas can be best managed by an organization which can flex resources at the time of need, and who is familiar with the latest advances in technology to optimize the resources museums have. Naturally, implementing the latest in LED lighting and solar panels can save energy costs in the long term, but in the short term they will also *increase* your annual budget. For example, in an outsourced high performing kitchen operations run more effectively, allowing you to focus on the creation and innovation of new exhibits, material and research for your audience.

## **Integrate Into Lives and Communities**

The availability of data and information today can provide us with so much more detailed intelligence regarding our potential audience. Historically, we could only tell if you were male or female, what zip code you lived in and maybe your median income. Today we can tell if you have a dog, cat or both, where you went to school, who your friends are, where you worked and lived and what was your last vacation.

The ability to segment and learn so much more about our audience is astounding. When we understand our audience we can better appeal to them and continually present relevant and exciting content that they value.

Bringing our research full circle, we begin to address the concept of integrating within our lives and communities. Merely creating a smartphone app is useful but it may get deleted or go unused after the first visit. Creating an app which provides useful tools and information when linked with other applications extends its useful life outside of the museum. Incorporating interactive games that could be played on a train - or relevant news feeds that can build excitement for an upcoming exhibit or solicit subscriber input on generating ideas for exhibits building on collaboration. Allowing users to participate in virtual and collaborative experiences such as building the Starship Enterprise or a self-sustaining urban food source hydroponically are creative ways to stay connected and hopefully gain repeat customers.

Create member and prospective member events such as scavenger hunts, cocktail parties and creative events that can be integrated with the technology that appeals to the social aspects of today's millennials. The black tie "rubber chicken" dinners are a thing of the past. New generations are looking for an event which is different, social and interactive. This plays to their sense of adventure and fun. In addition, having multiple lower cost events (e.g. cocktail parties, classes, performances, etc.) maintain interest throughout the year as opposed to a once a year black tie dinner of auctions and fundraising. This requires creating an overall marketing strategy with an integrated and public calendar.

Reaching out can mean both extending into the community in the form of classes, mobile exhibitions and teaching opportunities. It can also mean inviting the community in and creating a place of work, study and socialization.

The mobile workforce is increasing by the numbers, and although many people say they like to work at home, they find they really can't because of all the distractions and the local coffee shop is too noisy. It is believed that the typical mobile workforce is someone in their 20's or a mother with children at home. However, in the 2014 Census Bureau's Annual American Community Survey, it is said that the typical telecommuter is 49 years old, college graduate with an average salary of \$58,000/yr. and works for a company of 100 employees or more.

In 2013 the Detroit Institute of Arts looked to capitalize on this trend and redesigned its Kresge Court to create a place to be used for socializing and relaxing, dining or a place with Wi-Fi to work on your laptop.



Museum membership can be a way to provide a work/study place where the member can come to escape in their own private lounge. Retailers deploy the best practice concept of converting as much square footage to retail and revenue generating space from warehouse, storage and back offices. Members can be provided with a

place to work, connect, grab a meal, and perhaps meet with a co-worker or client. The space should be secluded from the tour groups but yet allow people to connect and explore taking breaks from their work.



One element that is showing increasing benefits in the office and consumer space is a concept called "living walls" which has been shown to increase productivity and the overall creative mood in the environment. In a research study conducted by the University of Exeter in the U.K., it was found that comparing two identical buildings one that had an installed green wall, the employees with the green walled work space had a 38% increase in productivity. Whether placed as part of an overall exhibit or to enhance the aesthetics of the building and environment, living walls are rapidly growing in popularity.

## Manage Risks

Tearing down your walls, opening your doors to virtual access all come with added risks. Boardrooms are seeing the fastest growing risk as reputation risk. From the wrongly perceived exhibit to the non-recyclable containers in the concessions, consumers are demonstrating

increasing choices based upon values. The greater challenge is the technology which can help you can also hurt you by being the rapid communication to a declining reputation.

Therefore, more and more nonprofits and institutions are forming risk assessment committees that evaluate all aspects of organizational risk from human capital, to exhibits/performances, technology breaches, policies and procedures, to security and safety.

Museums that house controversial works of art, religious relics and icons and be the host of thousands of visitors are now becoming increasingly viewed as easy targets for demonstrations or acts of terrorism because of their significance and perceived lack of security.

It is unfortunate, but risks to museums and learning institutions are increasing and addressing the issue by one person alone is limiting you to the abilities of that one individual. Risk committees are best formed from key areas of the organization such as finance, technology, curators, development, marketing and human resources. Together they should assess the risks and develop mitigation plans. Creating a crisis management plan and communications strategy should be documented, implemented and tested. Institutions should also consider scenario planning and potentially acting out a drill once a year to ensure employees are trained and know what procedures should be followed. Museums that tend to be seasonal and rely heavily on volunteer help should test their action plans more than once a year.



From the museum shootings in Tunisia to the active gunman at the Canadian War memorial, venues which host large crowds or are the source of controversial exhibits need to be prepared for such potential events. Even random events such as the abduction of a child can damage an organization and have the potential for an impact on revenue and public perception as being an unsafe place.

Sometimes just the mere change in public opinion can greatly impact an organization such as the “Black Fish” documentary airing at the Sundance Film Festival in 2013 and broadcasted by CNN portrayed the captivity of Sea World’s Orca Whale.



Regardless of your opinion on the captivity of animals in zoos and aquariums for preservation, education or entertainment, the undeniable

fact is that the movie had an impact on the opinions of the public and threatened the very existence of Sea World.

Although organizations cannot predict every possible risk or event, they can have greater insight when conducting this type of assessment as a team. Once a risk is identified, half of the work is done. The second half is a choice of addressing and mitigating the risk or not.

## **Build Lasting Relationships**

A sustainable strategy and organizational longevity ultimately relies on building lasting relationships. The donors and trustees of the past are not the same as the future. To build the future and avoid extinction requires constant evolution. The manner in which we maintain relationships today is very different. We tweet, post, check-in, want to belong and contribute to an organization that complements our personal beliefs. All the while also enriching our lives. We want to be connected socially and be on the cusp of adventure, experiences and innovation.

For some, it might difficult to comprehend how we can be innovative and think of the future when we are a museum of the past. It is just like the question we face when a child asks, "Why should I study history?" This question brings us back full circle to our original best practice concept, "Relevance".

Maintaining relationships is tapping into the relevance of our audience and tying into their everyday lives. Technology is the tool which keeps us connected. If organizations ignore or are slow to develop their connections to social

media, digital content or staying connected electronically, they will face potential extinction.

Non-profits have many relationships to maintain - from individual donors, visitors and corporate sponsorships to suppliers, academics, contributors and other non-profits.

Returning to our Millennial generation there are some key things museums can do to improve the customer service experience and strengthen the relationship with visitors and members. First realize you are dealing with a "click" and self-service generation. This is not to say they do not value human interaction. Humans should be deployed to enhance the experience or transaction but not hinder it nor create non-value added steps. Allow your customer to be in the driver's seat and give them options and choices which they can drive. Always remember that speed and efficiency are key because your new customer is an expert multitasker and also feeds on instant gratification.

Being connected is a full-time job and requires dedicated resources to bring the organization's strategy to life and breathe air into the lungs of the marketing and development teams. Building relationships and being connected is not flooding contacts with newsletters and promotions but allowing the contact to choose the method which they like to receive content.

## **Conclusions**

Our research incorporated trends and human behaviors in society as well as looked at the competing elements for time, learning and entertainment. Although in this case, applying our research to the museum, non-profit and creative arts industry, we also analyzed and

compared best practices to those organizations in the hospitality, entertainment and media industries.

Our findings can be best summarized in a list of best practices a museum or cultural institution can apply to their operations and strategy to keep pace with an evolving culture.

These best practices are:

1. Be RELEVANT – Whether your content is historical or scientific and revolutionary, you should strive to connect your relevance to everyday society and your target audience. The most valuable commodity today is people’s time and attention. You can only do this if you are perceived to be relevant.
2. Reach out past your four walls – Relevance helps attract your audience and reach helps bring them in. You must open your doors, data and information to become more virtual. People want a taste or a sample of your attractions and then they will come for the experience.
3. Create the EXPERIENCE – Once you have attracted your audience and brought them in, you must make sure you “wow” them and they will, in turn, be your promoters and advocates. You do not need a Disney budget to accomplish this, but you do need to create an experience they cannot get anywhere else.
4. Focus – It takes a lot of energy, talent and resources to keep evolving and releasing new and relevant material, content and research for your audiences - as well as fund raising. You should focus on these efforts and allow the experts to manage facilities, technology, food and beverage. These can

also be added streams of revenue to fund the future of your mission.

5. Integrate into people’s lives and communities – You need to stay connected on a regular basis whereby being complementary to people’s lives. Using a variety of media to provide useful information and being present and contributing to the community embeds your existence as a necessary asset and exceptional experience.
6. Manage Risks – If a person asks you, “tell me something you don’t know?” you should not be able to answer the question. Risks are an ever growing part of any organizations operations and becoming increasingly severe and devastating. No one person can be aware of all potential risks, but a team can better hypothesize, plan and mitigate those risks as identified. Not every risk can be avoided, therefore having a response plan, communications, training and drill testing is critical. Risk management should be incorporated into your operations.
7. Build Lasting Relationships – Generations come and go, however maintaining relationships and maintaining the methods of communication and relevance is a key to the longevity of any organization.

In closing, we believe that if an organization incorporates these elements into their strategic planning and operations they will build for the future and avoid potential extinction.

## About SAGIN, LLC

SAGIN is a Management Consulting and Executive search firm headquartered in Chicago which provides professional services related to Strategic Planning, Process Optimization, Technology Deployment, IT Managed Services, Executive Search and Development, and Risk Management and Compliance.



SAGIN, LLC is also unique in that it contributes 15% of its profits to a fund titled

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