



## Greetings!

The Theory of 5 team (To5) is excited to sponsor the Collegiate Challenge, co-sponsored by the **Council for Retail and Sales, located at DeSales University College of Business**. This team-based competition is tasked to solve a real business opportunity for the company.

The top team will be awarded \$1,200 to be divided by team members, a trophy, and their names on the CRS Big Trophy which will be housed at DeSales University. The second-place team will be awarded \$400 to be divided by the team and a trophy.

The competition culminates in a regional competition to be held on March 21, 2024, at the DeSales University campus. Each school or branch may submit up to 2 teams. **Last year some of the colleges ran a local competition and then sent their top team(s) to the final competition. This is a great class or club (e.g., Enactus, Business Clubs, LaunchBox) project!** The competition will be judged on the written executive summary, the presentation, and the Q&A session.

Details of the Challenge are in the following pages. We believe presenting students with real business problems and having them develop solutions to those problems will help bridge the gap between academics and the business world. Thanks for participating!

**Chris Saraceno**  
Author & Founder, Theory of 5

**Andrew Schultz**  
Operating Partner, Theory of 5 University

**Hayden Craddolph**  
Marketing Agency for Theory of 5

**Elaine Thode, CRS Program Director,**  
DeSales University  
[elaine.thode@desales.edu](mailto:elaine.thode@desales.edu)



# 2024 Collegiate Challenge

## Powered By



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## Important Dates

<b>Case Information Released</b>	By the end of December 2023
<b>Fri Feb 16, 2024</b>	<a href="https://thecrs.org/?page_id=405">Intent to Participate Form</a> is Due (https://thecrs.org/?page_id=405)
<b>Wed Mar 13, 2024</b>	Executive Summary due by 5:00 pm. Send to Elaine Thode, CRS Program Director, <a href="mailto:elaine.thode@desales.edu">elaine.thode@desales.edu</a>
<b>Thurs March 21, 2024</b>	Presentations by Teams to Judges at DeSales University.

**Direct questions about the competition to:** Elaine Thode, CRS Program Director, [elaine.thode@desales.edu](mailto:elaine.thode@desales.edu)

## Introduction

You've heard of the Shark Tank television show. We're taking that concept and applying it to a collegiate competition in retailing and sales! When you enter the **CRS Collegiate Challenge, Powered by the Theory of 5**, you gain both practical and theoretical experience in the development of recommendations for a client. This challenge allows you the ability to bring your lifelong learning skills to a competition that will help to build a great base for your personal career in business.

The focus of this competition will be on completing a brand assessment and developing a comprehensive marketing strategy to drive sales for the To5 book & workbook, To5 University, and the online Personal Growth Series. The Collegiate Challenge will surface ideas and creative solutions that will directly impact the company.

## Case Information

### *Theory of 5 Background / Overview*

**The Theory of 5 began as a legacy book written by Chris Saraceno** as a vehicle to pass wisdom and life lessons on to his children and grandchildren. Chris's book was first published in 2018 and today To5 has 3 main product offerings: 1) the Theory of 5 book and accompanying workbook; 2) the Theory of 5 University; and 3) the Theory of 5 online Personal Growth videos.

Chris Saraceno is a business executive with ownership in several prominent car dealerships in PA & FL, a real estate investor, speaker, and leader who has, over the past 38 years, *discovered*

*what surrounding yourself with happy and prosperous people, coupled with hard work, can bring over a lifetime.*

Chris has been a featured speaker at numerous conventions and has published hundreds of articles both online and in business magazines. While he speaks on a wide range of topics, the goal of all this activity is the same: to support people in achieving their potential and living their best life.

According to Chris's theory, individuals should seek to find mentors in the different areas of their lives that matter the most to our happiness and prosperity, which he identifies as: Spirituality; Marriage & Relationships; Parenting; Business & Finance; and Health. By listening to the advice of our mentors and asking them to guide and challenge us, Chris says we begin to walk the best path to our best selves.

The **To5 book** focuses on mentorship, including a section dedicated to each of the 5 areas noted above, and concludes with a series of interviews with several individuals that Chris considers role models. An accompanying workbook was developed to be used in tandem with the book for readers who were seeking to actively apply the Theory to their lives. Both the book and workbook are sold on the [theoryof5.com](http://theoryof5.com) website and [Amazon](https://www.amazon.com). Readers can also purchase the To5 book in a Kindle edition.

In 2022, the **Theory of 5 University** was born. For To5 University, Chris joined forces with business partner, Andrew Schultz, with a goal of providing a platform for in-person coaching sessions for individuals seeking to take their learnings one step further. Participants can choose from a variety of programs including those specialized in executive leadership, business & finance, health & fitness, and marriage & relationships. Sessions are typically held weekly and each is led by Chris Saraceno and facilitated by Andrew and/or expert coaches hand-selected by Chris. To5 University classes are held in FL.

In addition to in-person classes, To5 University currently employs the Mighty Networks platform to host interactive, online sessions. For example, at the time of writing this case study, the next upcoming class, Mastering You, is a 3-week program scheduled for (3) 90-minute Saturday sessions in January 2024. The cost is \$300 and users can sign up via Mighty Networks using this [link](#). More sessions are being drafted all the time.

The **Personal Growth Series (PGS)**, an online, self-moderated video series launched in December 2023, is the newest product offering by the To5. The PGS consists of (10) ~30-minute sessions in which Chris discusses his theory on the 5 topics, dissecting each as well as providing invaluable insight, advice, and calls-to-action to inspire viewers to incorporate the theory into their lives. The PGS series is available for users to purchase on the To5 website. Individual users can purchase the entire series for streaming in one of the following ways:

- 1) Essential Insights Plan - \$25 for 1-year access to the PGS videos

- 2) Signature Growth Plan - \$49 for 1-year access plus an autographed copy of the To5 book
- 3) VIP Mentorship Plan - \$99 for 1-year access plus an autographed copy of the To5 book, the To5 workbook, and an exclusive invitation to attend a (limited group) webinar/chat session with Chris personally.

Organizations who wish to provide access to or require employees to view the series may purchase the PGS at a group rate. As the software (called Cemboo) that houses the PGS is further developed, users will eventually be able to purchase segments individually (for those who may not be interested in all 5 of the areas).

The To5's future plans are to expand its online PGS product offering to include additional video workshops with content across all aspects of life and business. The To5's goal is to secure other coaches who are subject matter experts in a realm of topics to expand reach (think: [MasterClass.com](https://www.masterclass.com/)). Additionally, Cemboo provides the ability for To5 to sell ad space on its platform. For example, a business could purchase a banner ad that is displayed on the PGS website or purchase a 15-second commercial spot that would play before, after, or during the PGS series (similar to how YouTube shows ads). In this case, To5 would be responsible to sell the ad space but is able to keep the ad revenue since the Cemboo software is installed directly on the To5 website.

At present, there are two separate websites and social media accounts for the company. The To5 website and social media accounts are managed by an outsourced marketing agency and the To5 *University* accounts are managed by To5 University partner, Andrew Shultz and his team. Details are provided below.

#### **To5 Online presence**

Website: [theoryof5.com](http://theoryof5.com) & [chrissaraceno.com](http://chrissaraceno.com)

Facebook: <https://www.facebook.com/YourTheoryOf5> & <https://www.facebook.com/CBSaraceno>

Twitter: [twitter.com/chrisbsaraceno](https://twitter.com/chrisbsaraceno)

LinkedIn: The Theory of 5

Instagram: @TheoryOf5

YouTube: <https://www.youtube.com/c/theoryof5>

To5 song: [https://www.youtube.com/watch?v=il\\_q2Zi85V0](https://www.youtube.com/watch?v=il_q2Zi85V0)

To5 official music video: <https://www.youtube.com/watch?v=XJ0mgoPb3TQ>

Hashtags: #TheoryOf5 #To5 #ChrisSaraceno #AmazonBooks #FindYourPurpose #Perseverance #SelfDevelopment #PersonalGrowth #PersonalJourney #SelfDiscovery #Masterclass #Workshops #Mentorship #Mentor #Fitness #HealthAndWellness #Exercise #InspirationalQuotes #EmpoweringQuotes #LifeQuotes

#### **To5 University Online presence**

Website: [theoryof5university.com](http://theoryof5university.com)

Facebook group: <https://www.facebook.com/groups/thetheoryof5masterclass>

LinkedIn: The Theory of 5 University

Instagram: theoryof5university

[MightyNetworks.com](https://MightyNetworks.com) – an online learning community that To5 University utilizes to share ideas and host sessions.

### ***Case Focus and Opportunity***

This case focuses on performing a brand assessment and developing a cohesive marketing strategy that To5 can implement for all of its offerings. No ideas are too involved or too simple. The campaign should include both paid and organic strategies that can be launched within 1-2 months. The maximum budget for this project is \$30,000.

**For the purpose of this case, each student will be provided with a pdf copy of the book and workbook. Students will also be provided access to the online PGS videos for analysis purposes. Once registered the information will be sent to team members.**

### ***Assignment / Deliverables***

**Assignment: Approach this as if your team is a part of a consulting company.**

Incorporates ideas/recommendations around the topic posed above.

Ideas can include all aspects that are relevant to the questions posed. Teams will be responsible for researching the budget needed for their plan. Each team will then pitch their plan to the judges, detailing their recommendations, implementation, timeline, and budget. The team should provide rationale for recommendations.

**Deliverables are as follows:**

1. An expanded executive summary (5-8 pages)
2. Presentation (15 minutes max)

Ideas presented should be actionable. This means that the Theory of 5 team can implement the idea in a short period of time and that the idea deserves time, money, and energy to expand the idea.

On March 21, teams will present to judges, followed immediately by a 10-minute question and answer session with the judges. The winners will be announced on that day.

## Useful Sites

How to Write a Case Study: <https://www.thoughtco.com/how-to-write-a-case-study-analysis-466329>

How to Write Executive Summaries:

<https://www.uakron.edu/cba/docs/communications/WritingExecutiveSummaries.pdf>

## Rules and Procedures

1. The competition will be held March 21, 2024, at DeSales University, 2755 Station Ave., Center Valley, PA. More information on the venue will be sent to participating schools as we approach the deadlines.
2. Each college or university invited to compete is allowed two (2) teams in the competition. If the institution has multiple campuses (i.e., Penn State), each campus will be counted as a separate college and can send up to two teams. Each team must be comprised of at least 3 but no more than 4 students. If a team of 3, at least 2 team members must also present at the competition. If a team of 4, at least 3 of the 4 team members must also present at the competition. The challenge may be a class project, a club project or, if there is enough interest among students, a group of students may get together and compete. There **MUST** be a faculty advisor to the team. One faculty advisor **MUST** accompany the team to the competition venue. Special exceptions may be made for illness, etc. and are at the discretion of the sponsoring organization.
3. Each school entering the Collegiate Challenge must submit their [intent to participate form](#) by Feb 16, 2024 on the Council for Retail and Sales website.
4. Students working on the project must be undergraduates from a 2-year or 4-year college/university, with a graduation date of 2024 or later.
5. Each team is responsible for their own expenses (i.e. travel, transportation, lodging, materials for the presentation). Food will be provided on site (free of charge) and typically includes a light breakfast and full lunch.
6. **The finished executive summary must be received by Wednesday, March 13 by 5:00 p.m.** Projects should be sent by email to Elaine Thode, Council for Retail and Sales, DeSales University: [elaine.thode@desales.edu](mailto:elaine.thode@desales.edu). No exceptions to the deadline will be made.
7. **Contacting the Theory of 5:** Each team advisor (after submitting the intent to participate form) should collect questions that students may have regarding the competition as the semester progresses. These questions should then be submitted to [elaine.thode@desales.edu](mailto:elaine.thode@desales.edu) (assuming there are questions). Elaine will assemble the questions and provide general answers to the requesting advisor only.

8. When entering the challenge all students and faculty advisors agree that all the ideas from the competition become the property of Theory of 5. They further agree that all the ideas for the paper, and the representative information provided within the paper are the work of the students. All competitors agree that they will receive no compensation for their work.

## **The Written Portion – Expanded Executive Summary**

1. This challenge requires the development of a 5 – 8 page expanded executive summary. The expanded executive summary may NOT exceed the page limit. All pages, except the cover page, should be numbered. **All pages, including the cover page count in the page limit.**
2. The name of the competing college or university should appear on the cover page along with the company logo (which must conform to Theory of 5 branding standards), the team's name, the students' names, and the name and contact information for the faculty advisor. Other information, graphics, etc., are acceptable.
3. Each team should generate secondary data to substantiate all material found within their executive summary. APA (American Psychological Association) style should be used for referencing purposes within the expanded executive summary. Primary research is accepted and encouraged.

### ***Suggested Expanded Executive Summary Contents***

**Team members may decide on the contents. Shown below are suggested areas to include.**

#### **Introduction**

#### **Situation Analysis/SWOT**

1. Current situation (research that describes current situation with regards to case)
2. Competitive Analysis
3. SWOT analysis of the current situation

**Marketing Objectives** – use SMART objectives – Describe what your team wants to achieve as it relates to the case.

**Target Market Analysis** - Describe the target market(s) which includes customer characteristics. Which segment(s) of the target market will you target?

**Recommendations/Implementation** – Provide recommendations and how to implement

**Budget** – What is the budget and how will the money be spent?

**Evaluation**– Provides ideas on how the recommendations will be evaluated

**Conclusion**

**Works Cited** – Include the research used in development of the expanded executive summary in APA (American Psychological Association) style.

### ***The Presentation***

1. Teams: Each team must be comprised of at least 3 but no more than 4 students. If a team of three, at least 2 team members must also present at the competition. If a team of four, at least three of the four team members must also present at the competition. Any work must be done by the students on the team. Exceptions are subject to the discretion of the sponsoring organization.
2. Timing: Each team will be required to make a 15-minute (limit) presentation to the judges. Following the presentation there will be a 10-minute (limit) question and answer (Q&A) session with the judges. The 15-minute limit is hard, meaning that, at the end of the 15 minutes, the person timing will say, “stop” and the presenting team must stop their presentation. A two-minute warning will be provided. The person timing will stop the judges Q&A sessions at the 10-minute mark, no matter where the teams or judges are in asking/answering the questions. The faculty advisor may attend the Q&A session but may not participate.
3. The team members MUST operate all electronic presentation devices. No one who is not a member of the team (including the team’s advisor) may help during the presentation. Teams are responsible for all their own equipment. The facility will have a computer with PowerPoint and Internet capabilities, a presentation remote control, and a screen to project the presentation.
4. The presentations may be made utilizing any method desired. Graphs, layouts, charts, etc. may be used and displayed. Computer-generated presentations are allowed. Students may show and/or hand the judges items (such as examples of creative ideas); however, students may not GIVE them any items (such as food, gifts etc.). Corrections to errors made in the expanded executive summary may not be made and given to the judges during the presentation.
5. Anyone may be present during presentations. No one may enter the presentation rooms after the start of the presentations. Latecomers will be turned away.

## ***Awards***

Awards are determined by the combined score of the expanded executive summary and presentation.

<b>Award</b>	<b>Description</b>
<b>1<sup>st</sup> place</b>	The team will receive a trophy that can be housed at the winner's school, award certificate, and \$1,200 total to be divided equally among team members  The team members' names will be added to the Big Trophy, housed at DeSales University. This trophy contains team member's names and sponsors from previous competitions.
<b>2<sup>nd</sup> Place</b>	The team will receive a trophy that can be housed at the winner's school, award certificate and \$400 total to be divided equally among team members.
<b>3<sup>rd</sup> Place</b>	Certificate for each team member
<b>Other awards</b>	There may be other awards presented by the judges if outstanding performance is indicated. This will be up to the judges' discretion. For example, awards MAY be given for "Best Presenter," or for other achievements that exceed the minimum expectations.

## ***Scoring***

1. Scoring sheets for both the expanded executive summary and presentation will be used to choose winners. These score sheets should help the teams develop their expanded executive summary content and are included below.
2. Judges' decisions are final.
3. The penalty for all violations is disqualification. Whether or not a disqualification is warranted is up to the representatives of the sponsoring company.

## ***Judges***

There will be 4-5 judges. Some or all will be from the sponsoring company and if needed, faculty and/or practitioners. The judges for the challenge will be individuals who are experts in their areas.

## Tentative Score Sheets

### CRS Collegiate Challenge - Expanded Executive Summary

	Must Improve	Should Improve	Satisfactory	Very Good	Excellent	Score
<b>Situation/Strategy</b>						
Situation Analysis	0-3	4-5	6-7	8-9	10	
SWOT	0-8	9-10	11	12-13	14-15	
Target Market Analysis	0-3	4-5	6-7	8-9	10	
Marketing Objectives	0-1	2	3	4	5	
<b>Ideas</b>						
Marketing Strategy/Recommendations and Implementation Ideas	0-19	20-23	24-27	28-31	32-35	
Budget Analysis	0-1	2	3	4	5	
Evaluation	0-1	2	3	4	5	
<b>Other</b>						
Introduction	0-1	2	3	4	5	
Conclusion	0-1	2	3	4	5	
Documentation of sources	0-1	2	3	4	5	
	<b>TOTAL</b>					

### CRS Collegiate Challenge – Presentation

	Must Improve	Should Improve	Satisfactory	Very Good	Excellent	SCORE
Opening – Attention getting, led into topic	0-1	2	3	4	5	
Current Situation/TM Analysis/objectives/SWOT	0-17	18-20	21-23	24-26	27-30	
Recommendations	0-19	20-23	24-27	28-31	32-35	
Conclusion – Effective	0-1	2	3	4	5	
Overall Delivery, gestures, energy level, voice	0-3	4-5	6-7	8-9	10	
Visual Aids	0-3	4-5	6-7	8-9	10	
Appearance – dressed for a professional presentation	0-1	2	3	4	5	

### Contact Information

Questions or concerns should be directed to: Elaine Thode, CRS Program Director, [elaine.thode@desales.edu](mailto:elaine.thode@desales.edu) **Note: Any contact must be initiated by the faculty advisor.**