**Report Edits:**

**Overall edits:**

* We would like a darker blue – close to a navy but a little lighter; please use the actual colors of the two company logos throughout
* Remove bullet points in front of each orange section heading
* We’d like to see if you can use a small version of the Lockton & SCIO logos inside the gray boxes **throughout report.** Just use LOCKTON and SCIO in their colors and fonts, not the other parts of their logos. Our goal is to make it easier for reader to know which company they are reading about.
* We want to add a few quotes throughout. I have some listed in this report, but we may come up with a few more if the page has empty space. Can you come up with a graphical way to present these that will be consistent for each one?
* Anytime we have bullets, move the bullet in closer to the words
* Update the current footer to just © 2018 Cleaver Company www.cleavercompany.com

**Cover Page**

* Can the blue box go all the way to the side and top of the page?
* Make the Cleaver logo smaller
* Make both company logos bigger
* Make MAY 2018 smaller

**Delete 2nd page that is white with Lockton/SCIO Partnership Summary Report May 2018**

**Page 1 – Table of Contents**

* Change color of page numbers to blue
* Edit Page #s to correlate to new page numbers resulting from edits
* Update PARTICIPANTS & METHODOLOGY to ADVISORY TEAM & METHODOLOGY
* Change the bullet points under APPENDIX to A. B. C.

**Page 2**

* Delete the wider orange bar after Introduction

**Page 3**

* Delete Orange Key Targets
* Remove the check marks – possibly just smaller orange circles?
* Change the lettering to all caps for the 7 orange titles after Lockton & SCIO agree on the

**Page 5:**

* We want to have just “Quick Win” Opportunities on this page.
* Second bullet under Feedback from SCIO should end with the word introduced. “Lockton leaders stay engaged…” is its own bullet
* Put a bullet point before last line under Feedback from SCIO (SCIO’s team…)
* Add this quote at bottom on page

*“Let’s continue to build excitement around the product. SCIO and Lockton*

*have the potential to do great things together.”*

**Page 6 (new)**

**PRIORITY PARTNER SUCCESS FACTORS (this will be own page)**

* We want just the Overall Top 3, Lockton Top 3 and SCIO Top 3 + a few quotes. Two quotes are included below. Can you do something graphically so this fills up more of the page?

*“We are making progress on the commitment to a “partnership mindset”*

*More education and leading by example will go a long way.”*

*“Both parties are committed to higher quality communication. This feels good.*

*We both own this and need to make sure it happens.”*

**Page 6 (old) ; now Page 7**

* Change wording in two gray boxes to:
  + % LOCKTON RESPONDENTS SELECTING FACTOR AS “TOP 3”
  + % SCIO RESPONDENTS SELECTING FACTOR AS “TOP 3”

**Page 7 (old) ; now Page 8**

* Put NUMERICAL RATING SUMMARY in a “grey box
* Move the chart to be more in the middle of the page.
* Update \*Red & Green highlights…. “ to blue font (except for “red” and “green”)

**Page 8 (old) through Page 9 (old) ; now Page 9 and 10**

* Put LEADERSHIP ALIGNMENT/PARTNERSHIP MINDSET in a grey box
* Remove grey box around all the recommendations
* Update LOCKTON RECOMMENDATIONS & SCIO RECOMMENDATIONS to the newly formatted Lockton and SCIO logos so it will read “

Please continue this formatting throughout the entire Partner Success Factor Recommendations section, i.e. TRUST & TRANSPARENCY in a grey box with the new logos w RECOMMENDATIONS

**Page 10 (old) ; now Page 11**

* Replace title in orange from PARTICIPANTS & METHODOLOGY to ADVISORY TEAM
* Delete PARTICIPANTS in blue
* Update LOCKTON to the new Lockton Logo and change orange background bar to grey color. Same for SCIO
* Update METHODOLOGY to orange font; same font size as ADVISORY TEAM at top of page
* Update “Participants were asked….” to ADVISORY TEAM WAS ASKED….

**ADD NEW Page 12** with APPENDIX center justified; blue larger font

**Page 11 (old) through Page 15 old);** **new Page 13 thorough Page 17**

* Update title to APPENDIX A - PARTNER SUCCESS FACTOR FULL FEEDBACK
* Update all blue titles from center to justified to BLUE BOLD FONT within GREY BOX
* Update all orange boxes that say either LOCKTON FEEDBACK OR SCIO FEEDBACK to just have either the Lockton logo or SCIO logo.

**Page 16 (old) through Page 18 (old);** new Page 18 through Page 20

* Update to APPENDIX B – “OVERALL PERFORMANCE” FULL FEEDBACK
* Change orange boxes on all pages to grey box
* Format the actual feedback in accordance with the original document, i.e. include spaces separating the individual comments (similar to the first quote)

**Page 19 (old) ; Page 21**

* Change title from “OVERALL PERFORMANCE” FULL FEEDBACK to APPENDIX C - PARTNER SUCCESS FACTOR DEFINITIONS
* Bold the 12 titles that are capitalized, i.e. PERFORMANCE & RESULTS, LEADERSHIP…..