

# TBH Digital Solutions

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## Andover Eye Institute - Project Proposal

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### Introduction

Our strategic approach to digital growth ensures that AEI's immediate lead generation and long-term engagement needs are met. Through a cohesive ecosystem of web development, CRM integration, and targeted digital marketing, we'll empower AEI to drive patient recruitment and sustainable growth.

### Proposal for Comprehensive Digital Solutions

This tailored solution addresses AEI's unique goals with a fully integrated approach, combining web development, CRM setup, and ongoing content management to enhance AEI's digital footprint. We're eager to discuss the implementation of this plan and optimize your reach.

### 1. Website Build

#### Scope of Work

AEI's website will serve as the core digital hub, with user-friendly design and conversion-focused pages that guide users from awareness to engagement. This includes:

- **Main Website Pages:** Key informational pages that establish AEI's expertise and streamline the user journey.
- **Gated Content Pages:** Secure sections designed to capture valuable lead information and provide exclusive resources.
- **Marketing Pages:** Strategically optimized pages that focus on conversion through clear calls-to-action.

## Main Website Pages (Un-Gated: 10 Pages)

Page Name	Purpose	Cost
What to Expect	Establishes trust by outlining the participant journey, from first contact to trial involvement.	\$1,000
Trial-Specific Pages (Visit & Travel Information)	Provides essential logistical details, including travel guidance and visitation protocols, to assist participants in planning their involvement.	\$1,000
Active Clinical Trials Overview	Lists all ongoing clinical trials with brief descriptions, helping users explore and identify relevant options.	\$1,000
Individual Clinical Trial Pages (Dry Eye)	Detailed page about the Dry Eye trial, including eligibility criteria and enrollment information.	\$1,000
Individual Clinical Trial Pages (Allergy Eye)	Provides comprehensive information about the Allergy Eye trial, guiding users through eligibility and trial objectives.	\$1,000
Individual Clinical Trial Pages (MKC)	Contains details on the MKC trial, such as objectives, eligibility, and participation steps.	\$1,000
SEO Mini Blog Pages (4 posts)	Educates users on topics related to clinical trials, improving search visibility and driving organic traffic.	\$2,000
FAQ & Q&A Page	Addresses frequently asked questions to ease user concerns and streamline the onboarding process.	\$1,000
Risk Assessment & Trial Participation	Provides a transparent overview of trial risks and participation requirements to support informed decision-making.	\$1,000
Clinical Trials Landing Page	A comprehensive landing page for trial options, directing users to individual trial pages based on interest.	\$1,000

**Total Cost for Main Website Pages:** \$13,000

## Gated Content Pages (7 Pages)

These secure pages are designed to capture and retain user information through registration or login.

Page Name	Purpose	Cost
Login/Registration	Secure portal for user access, ensuring AEI captures essential lead data while enhancing user engagement.	\$1,500
Gated Case Studies	Gives registered users access to detailed case studies that showcase successful outcomes, building trust and credibility.	\$1,500
Success Stories (Gated)	Shares patient testimonials to build confidence in AEI's clinical trials, accessible only to registered users.	\$1,500
Incentivized Pre-Screening	Offers incentives for completing pre-screening questions, fostering early engagement and lead qualification.	\$1,500
Eligibility Criteria (Gated)	Displays in-depth eligibility requirements for trials, helping users self-assess suitability before proceeding.	\$1,500
Content Hub/Resource (Gated)	A resource center with guides, articles, and educational materials for registered users, supporting continuous engagement.	\$1,500
Exclusive Articles, Testimonials (Gated)	Provides access to premium content, including expert articles and patient stories, to keep users engaged and informed.	\$1,500

Total Cost for Gated Content Pages: \$10,500

## Marketing Pages for Individual Trials (Gated: 4 Pages)

These targeted pages are optimized for conversion, designed to generate interest in specific clinical trials.

Page Name	Purpose	Cost
Clinical Trials Landing Page (For all trials)	A central page for clinical trial campaigns, allowing users to view trial options and take action toward participation.	\$1,500
Individual Clinical Trial Pages (Dry Eye)	Conversion-focused page for the Dry Eye trial, with content designed to guide users toward enrollment.	\$1,000
Individual Clinical Trial Pages (Allergy Eye)	Engages users with the Allergy Eye trial details, prompting them toward next steps for participation.	\$1,000
Individual Clinical Trial Pages (MKC)	Dedicated page for the MKC trial, focused on attracting and converting potential participants.	\$1,000

Total Cost for Marketing Pages: \$4,500

## Website Build Cost Breakdown

Total Cost for Main Website Pages: \$13,000

Total Cost for Gated Content Pages: \$10,500

Total Cost for Marketing Pages: \$4,500

## Overall Total for Website Build: \$28,000

### Included Additional Services

- **Single Sign-On (SSO) Integration:** Allows users to log in using Google, Facebook, or corporate accounts.
- **Landing Page Optimization (Conversion Rate Optimization - CRO):** Increases conversion rates through targeted optimization.

## 2. CRM Setup

### Scope of Work

Our customized CRM solution for AEI centralizes patient and lead data, automates critical workflows, and enhances communication across multiple channels. Designed specifically for clinical trial recruitment, this CRM setup streamlines lead generation and patient engagement, helping AEI to recruit participants efficiently and compliantly. By leveraging advanced data management and real-time analytics, AEI will improve operational efficiency and support long-term growth.

### Core Components of the CRM Setup

- **Lead Management & Multi-Channel Communication:** Centralized lead tracking across platforms (email, social media, and phone) ensures consistent and timely engagement.
- **Automated Email Marketing & Performance Analytics:** Tailored campaigns with tracking for opens, clicks, and conversions to measure effectiveness and optimize outreach.
- **HIPAA-Compliant Data Management:** Secure storage and transfer processes protect patient data, ensuring adherence to healthcare compliance standards.
- **Real-Time Dashboards & KPIs:** Customizable dashboards display conversion rates, lead engagement metrics, and other performance indicators, enabling data-driven adjustments.

- **Integrated Appointment Scheduling for Screenings:** Allows patients to schedule phone and in-person screenings, a key feature for lead qualification and conversion.

## Expected Outcomes

The CRM setup will deliver a comprehensive system for AEI, providing:

- **Enhanced Conversion Rates:** Optimized lead management and multi-channel follow-up increase conversions from lead to trial participant.
- **Improved Patient Engagement:** Tailored communication fosters stronger patient relationships, increasing retention and recruitment success.
- **Data Security & Compliance:** HIPAA-compliant data management practices guarantee secure handling of patient information.
- **Valuable Insights for Strategic Decisions:** Real-time dashboards and analytics provide actionable data to refine outreach strategies and improve campaign ROI.

This CRM implementation is designed to be the backbone of AEI’s recruitment strategy, seamlessly connecting website interactions, social media engagement, and lead data into a unified system that maximizes efficiency and growth potential.

## CRM Features and Pricing Breakdown

Feature	Description	Setup Fee	Monthly Management Fee
Sales Funnel Builder	Streamlines the conversion process with tailored workflows, ensuring efficient lead nurturing and trial enrollment.	\$2,500	\$500
Centralized Data Management	Aggregates all lead and patient data, enabling personalized communication and efficient relationship management.	\$2,000	\$400
Lead Capture & Automated Follow-ups	Captures leads through forms and ads, with automated, customized follow-ups based on user behavior.	\$1,500	\$300
Email Campaign Automation	Sends automated, targeted emails with performance tracking, increasing engagement and conversions.	\$2,000	\$500
Social Media Integration	Connects social media platforms (LinkedIn, Facebook, Twitter) with the CRM, simplifying engagement tracking and outreach.	\$1,500	\$400
HIPAA-Compliant Data Management	Ensures patient data security with encryption and regulatory compliance in all storage and transfer processes.	\$3,000	\$600
Real-Time Dashboards	Provides custom dashboards showing KPIs such as conversion rates and campaign performance for quick insights.	\$2,500	\$500
Appointment Scheduling for Screenings	Streamlines appointment bookings with automated reminders, reducing no-shows and improving lead conversion.	\$2,000	\$450

## CRM Setup Cost Breakdown

**Total Setup Fees for CRM Setup:** \$12,000 to \$15,000

**Total Monthly Management Fees:** \$2,500 to \$3,750

### Additional Cost Considerations

- **Service Provider Fees:** Fees for third-party services (Mailchimp, Twilio, LinkedIn Ads, etc.) are billed directly to AEI. Our team will assist with setup and ensure smooth integration with the CRM system.
- **Customizations & Add-ons:** Additional features like AI-driven lead scoring, advanced analytics, or integration with other platforms can be added to meet AEI's specific needs. These may involve extra costs based on customization requirements.

## 3. Content Creation & Social Media Management

### Scope of Work

The Content Creation & Social Media Management package is crafted to establish AEI as a trusted authority in clinical

trials, leveraging a Business-to-Ethical Exchange (B2E) approach. This strategy prioritizes ethically compliant, impactful content that aligns with AEI's brand values and resonates with its target audience. Our bulk content creation process not only ensures consistency and accessibility but also simplifies the IRB submission process by enabling all assets—such as emails, SMS, brochures, website content, and ads—to be approved in a single batch. This streamlined approach reduces delays, improves resource efficiency, and ensures all content aligns with AEI's marketing and recruitment goals.

### Content Strategy Overview

AEI's content strategy will feature a mix of high-impact visuals, educational short-form videos, and consistent social media updates across platforms like LinkedIn, Instagram, and Facebook. By creating a readily available content library, AEI can maintain a steady, engaging digital presence that drives patient awareness and participation in clinical trials.

### Expected Outcomes

- **Consistent Audience Engagement:** By maintaining a steady content flow, AEI will reinforce its presence across social channels, building brand trust and awareness.
- **Streamlined Compliance:** Bulk IRB submissions reduce approval delays, enabling faster content deployment with all regulatory standards met.
- **Increased Lead Generation:** Engaging visuals and videos foster a connection with potential participants, encouraging them to explore and sign up for AEI's clinical trials.
- **Data-Driven Adjustments:** Through performance analytics, we can fine-tune content strategies to maximize reach and engagement over time.

This Content Creation & Social Media Management package equips AEI with a robust, scalable strategy that enhances its digital presence and drives actionable results in patient recruitment and engagement.

### Content Creation Features and Pricing Breakdown

Feature	Description	Setup Fee	Monthly Management Fee
High-impact Image Posts	Engaging, high-quality visuals (40 images) optimized for social media on platforms like LinkedIn, Instagram, and Facebook.	\$2,500	N/A
Short-form Video Content	Ten educational, high-engagement short-form videos (30 sec - 1 min) designed to inform and connect with AEI's target audience.	\$3,500	N/A
Bulk Content Creation for IRB	Comprehensive content package (emails, SMS, brochures, ads) submitted for IRB approval in one batch, ensuring compliance and cost efficiency.	\$5,500	\$1,200
Social Media Strategy & Execution	Strategic content calendar development and management, supported by analytics for ongoing performance tracking and adjustments.	\$3,000	\$1,500

### Cost Breakdown

- Setup Fees:** \$14,500 across all content creation services.
- Monthly Management Fees:** \$2,700 per month, covering ongoing content management, engagement tracking, and optimization.
- Service Fees:** Variable, based on external agreements, such as IRB submission fees.

## 4. Digital Marketing

### Scope of Work

The Digital Marketing package is designed to drive high-quality traffic to AEI's platforms, utilizing advanced tracking, strategic ads, and geo-targeted marketing. Our goal is to maximize reach, attract prospective patients, and improve engagement by combining Google Analytics, PPC, and social media campaigns. We will also implement a Consent Management Platform (CMP) to maintain data privacy compliance and strengthen patient trust.

By tracking real-time analytics, creating custom ad campaigns, and using geo-targeting, we ensure AEI’s digital marketing efforts reach the right people at the right time. This approach streamlines the path from awareness to enrollment, while regular optimization of campaigns ensures that each dollar spent is impactful and measurable.

### Expected Outcomes

- **Improved Conversion Rates:** Targeted, optimized campaigns increase interest and drive conversions for clinical trial participation.
- **Enhanced Audience Engagement:** With custom ads and geo-targeting, AEI can reach a precise audience, fostering stronger connections.
- **Data-Driven Strategy Adjustments:** Real-time analytics from GA4 and GTM offer insights to continuously refine and improve marketing efforts.
- **Privacy Compliance:** The CMP ensures all data collection and usage meet regulatory standards, building trust with users.

This Digital Marketing package supports AEI’s goal of expanding reach and patient engagement. By combining strategic targeting, compliance measures, and data-driven insights, we create a digital ecosystem that enhances campaign effectiveness and maximizes return on investment.

### Digital Marketing Features and Pricing Breakdown

Feature	Description	Setup Fee	Monthly Management Fee
Google Analytics 4 (GA4)	Tracks real-time user behavior (sessions, bounce rates, conversions) to provide insights for improving campaign performance.	\$2,500	\$500
Google Tag Manager (GTM)	Enables advanced event tracking (e.g., form submissions, video plays) without modifying website code.	\$1,500	\$300
PPC & Meta Ads Campaigns	Custom, targeted ads on Google and Meta, using audience segmentation and keyword optimization.	\$3,000 per platform, per campaign	\$750 per platform, per campaign
Consent Management Platform (CMP)	Ensures compliance with data privacy regulations and manages user consent preferences, essential for tracking and cookies.	\$2,000	\$400
Geo-targeting & Geofencing	Targets users based on location, optimizing ad delivery in regions relevant to AEI’s healthcare screenings and trials.	\$3,500	\$1,000

### Cost Breakdown

**Setup Fees:** \$12,500 across all digital marketing services.

**Monthly Management Fees:** \$2,950 per month, covering campaign management, tracking, and performance optimization.

**Service Provider Fees:** Variable, paid directly to platforms like Google and Meta, based on specific campaign budgets.

## 5. Overall Cost Breakdown

This breakdown summarizes the setup and ongoing costs required to execute the proposed digital strategy, ensuring AEI can make informed budgetary decisions.

### Total Setup Fees

- **Minimum Total Setup Fees:** \$67,000
- **Maximum Total Setup Fees:** \$70,000

### Total Monthly Management Fees

- **Minimum Total Monthly Management Fees:** \$8,150 per month

- **Maximum Total Monthly Management Fees:** \$9,400 per month  
This cost structure provides a complete view of the initial investment and ongoing expenses associated with AEI's digital marketing, content, and CRM initiatives.

## Project Timeline

The project will follow a phased approach to ensure efficient implementation and optimized results. Each phase includes clear milestones to maintain transparency and trackable progress.

- **Phase 1 (Month 1):** Website Development & Content Creation - Initial efforts will focus on building AEI's website, creating high-quality content, and establishing foundational digital assets.
- **Phase 2 (Month 2):** CRM Setup & Marketing Campaign Launch - This phase involves setting up AEI's CRM, integrating it with the website, and launching initial digital marketing campaigns.
- **Phase 3 (Month 3):** Full Ads Rollout, Geo-targeting & Continuous Optimization - Final phase includes comprehensive ad deployment with geo-targeting and continuous campaign optimization based on performance data.



## Project Benefits

- **Enhanced Conversion Rates:** Optimized landing pages and targeted campaigns significantly increase AEI's ability to convert website visitors and social media followers into clinical trial participants.
- **Operational Efficiency:** Automated workflows and CRM integration streamline patient management and reduce manual effort.
- **Superior User Experience:** Mobile-first, responsive design for trust and satisfaction.
- **Data-Driven Insights:** With real-time analytics, AEI gains actionable insights that support data-backed decision-making and continuous optimization of outreach efforts.
- **Compliance and Security Assurance:** HIPAA-compliant data management practices ensure AEI meets industry regulations and builds user trust.

## Contract Terms

The following terms outline engagement expectations and project commitments:

- **Minimum Engagement:** 3 to 6 months, with optional extensions based on performance metrics and ongoing campaign success.
- **60-90 Day Build Plan:** This schedule details deliverable timelines, ensuring transparent expectations and accountability.
- **90-Day Marketing Commitment:** Ad campaigns, including PPC and social media ads, will run for a minimum of three months post-launch, allowing for meaningful optimization and performance analysis.

These contract terms create a framework for a successful partnership and ensure clear deliverable timelines for AEI's project.

## Deliverables & Payment Structure

### Deliverables

To ensure AEI receives measurable value at every stage, the project includes specific deliverables within each phase. Examples include live website pages, configured CRM systems, completed content assets, and ongoing digital marketing reports. This structure provides transparency and accountability, ensuring AEI can track progress and results effectively.

### Payment Structure

- **Setup Fees:** 60% of total setup fees due at contract signing, with the remaining 40% due within 15 days after project completion.



- **Ongoing Management:** Monthly management fees are billed on the contract start date, recurring on the same day each month.
  - **Direct Billing for Ad & Service Fees:** AEI will be billed directly by service providers (e.g., Google Ads, Mailchimp, Twilio), including ad spend costs, which are paid directly by AEI to each platform.
  - **Late Payment Interest:** A 20% interest rate will be applied to any balance unpaid 30 days past the due date, accruing monthly until paid in full.
- This structure provides AEI with clear payment timelines and maintains consistent project funding to ensure all deliverables are met.

## Next Steps

We are excited to help AEI expand its reach and optimize patient engagement through a comprehensive digital strategy. Please review this proposal in detail. Once you are ready to proceed, we can schedule a follow-up meeting to confirm the specifics and begin the onboarding process.

Upon approval, our team will initiate the first phase of the project, ensuring AEI's digital transformation is launched efficiently and effectively.

## TBH Digital Solutions

Digital Marketing Proposal

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Disclaimer: This proposal is intended for informational and planning purposes only. Prices and services are subject to change based on further discussions and project requirements. This is not a finalized price and should not be considered a contractual agreement.