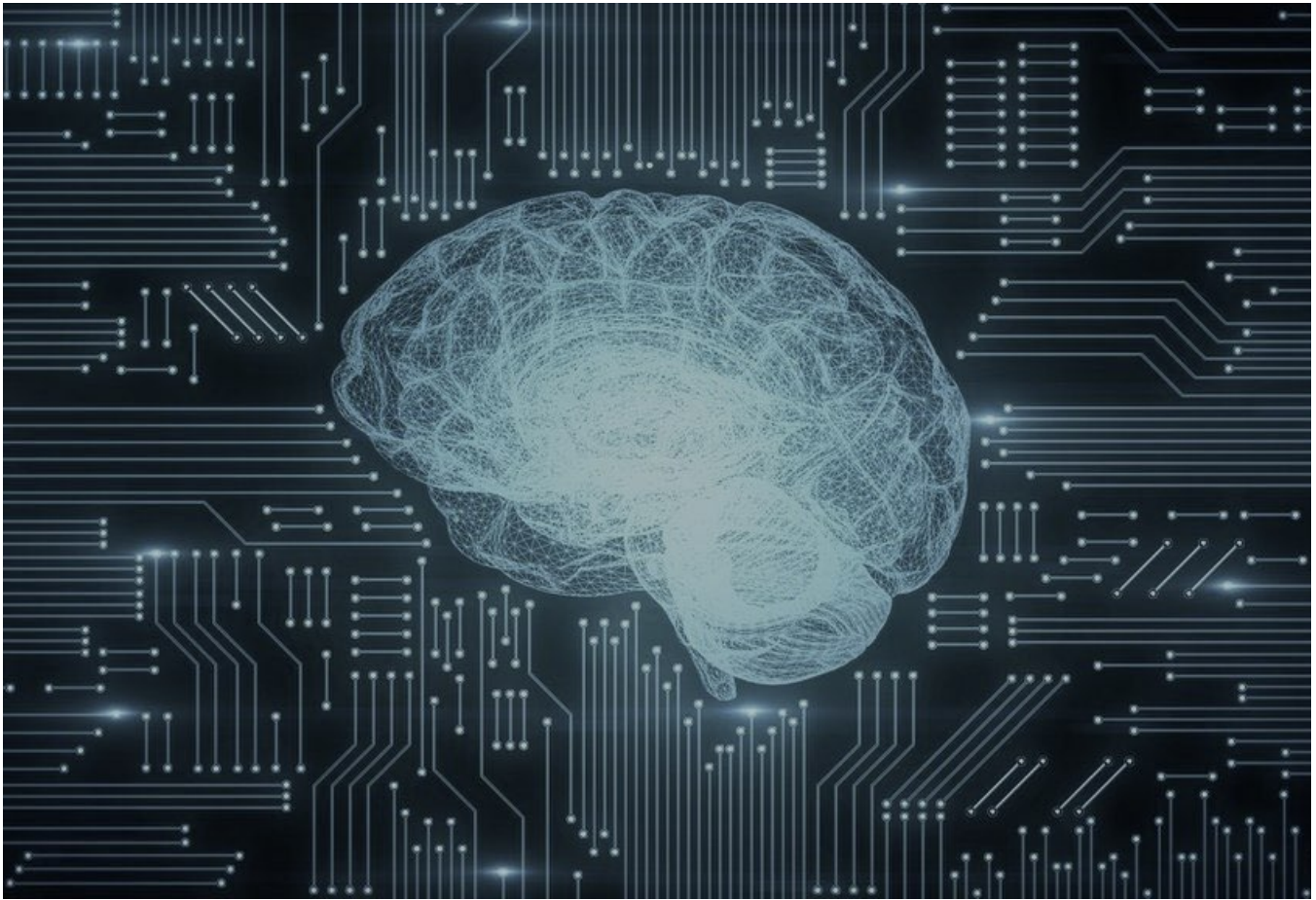




OCTOBER 6, 2023

# MARKETING PROJECT PROPOSAL

Bill Carney



TO DEVELOP A COMPREHENSIVE MARKETING STRATEGY FOR XXXXXX AND CONDUCT TACTICAL TESTING FOR AN ACTIONABLE PLAN MOVING FORWARD.

## THE APPROACH

I would like to help XXXXXX establish themselves as THE source for truth within the data community, this means creating a solid and trustworthy reputation. I hold a deep belief in organizations that embody an inspired vision for a brighter future. XXXXXX epitomizes this ethos and warrants a refined, sophisticated brand that not only piques interest and enthusiasm but also sets itself apart in the ever-evolving data intelligence marketplace.

Through my expertise, I am committed to showing you how to convey your unique narrative in captivating and aesthetically pleasing ways – precisely when it matters most. I firmly adhere to the notion that creativity devoid of a profound idea lacks purpose. I don't perceive visuals, collateral, or websites as the ultimate solution - although they are key methods of communication.

In my view, the real solution is in aiding you to craft an experience that is unparalleled. This represents an opportunity to create something genuinely exceptional. I selectively collaborate with a limited number of clients each year who share the vision of achieving the extraordinary.

# THE THINKING

## KNOW THE TRUTH, BUILD THE TRUST, ACT TRANSPARENTLY, DO GOOD

I have been helping companies of all types overcome challenges for more than 20 years. From business intelligence, analytics, data aggregation, application security, to development tools/resources and beyond, I've created successful data-driven brands, traditional and digital campaigns, websites, and more that hone in on exactly who they need to reach.

My work ranges from simple scenarios focused on single-audience offerings with 2-3 services/product/packages to restructuring global divisions requiring rebranding/messaging for many brands/sub-brands and with 10+ buyer personas.

*Knowing how, what and when to communicate is a strategic and crucial element of telling the right story when it matters the most.*

I take the time to understand the unique differences of each of our targets. That's what has allowed me to experience continued success – especially in markets filled with similar offerings, similar graphics and similar messages.

For XXXXXX specifically, I'll use cross-industry insights, interests, and internal expertise (your employees are a goldmine!) to help you establish a captivating, tailored brand experience that stands out from competitors and delights audiences.



I describe this approach as "focused discovery," which starts with a deep assessment of your current situation, then working to find ways to define and reshape your presence – solidifying the core "big idea" and strategic brand approach that will set the stage for all future efforts to come.

# THE PROGRAM

We need to create a marketing program and strategy that is crafted to assist you in defining a fresh visual aesthetic and tonal direction that not only showcases your true personality but also resonates with the audiences and sets you apart in your market. The two-phased process allows the strategy and design to delve into the core foundational elements that will lay the groundwork for the evolution of your brand.

Phase 1 - Research & Diagnostics	Phase 2 - Prescription & Recommendation
Meetings, interviews, audits, Martech assessment, readouts, data identification and collection.	Marketing plan foundation and strategy, readouts, audit reports, documentation, launch tests

## BUDGET & TIMING

I'm open to accommodating your preferences and collaborating to find the most suitable approach. Considering the nature of this program as a project, it would be practical to invoice you on a monthly basis at the end of each 4-week cycle. My hourly rate is \$XXX, and commencing the project on October 9th would give us a 12-week timeline, concluding on December 29th. Although I won't be meticulously tracking hours, a rough estimate, assuming around 40 hours per week, puts the total at \$XX,XXX. Invoices can be sent at the conclusion of every four weeks.

We maintain flexibility in our arrangement, allowing for cancellations at any time. However, I kindly request that we treat each beginning of the month as a full month invoice once we commence.

Furthermore, for an effective execution of our strategies, we'll require funding amounting to \$15,000. This budget will cover expenses related to running digital tests, campaigns, objectives. As I am not a full-time employee, I will make

recommendations to the CXO, who will decide on Marketing technology investments. Please be aware that lacking the requisite technology could impede our progress in reaching the milestones outlined below.

## TENTATIVE SCHEDULE

		Month 1				Month 2				Month 3			
Milestone 1													
	Kickoff Meetings												
	Stakeholder Interviews												
	CRM Adjustments & Workflows												
	Content Audit & Documentation												
Milestone 2													
	Data Assessment & Collection												
	ICP Documentation including TAM/SAM												
	Target Accounts & Parent Child Relationships												
	Website/Vendor Assessment & Re-structure												
Milestone 3													
	1st Digital Campaign Test												
	Martech Gap Analysis												
	Foundational Marketing Plan, Strategy, and Options												

## REQUIREMENTS

- Weekly checkins and access with the CXO
- Funding for tests and test campaigns
- Technology for campaigns
- Access to data sources and content repositories for collection and cataloging
- Access to all current tools and contracted vendors:
  - Google Analytics & Tag Manager, CRM, & Marketing Automation, CMS, SEO, Social, Forms, Etc

# THE OUTCOME

As we embark on this journey to develop a comprehensive marketing strategy for XXXXXX and execute tactical testing, I am filled with optimism about the potential success that lies ahead. Our shared vision of establishing XXXXXX as the definitive source for truth within the data community is inspiring and motivating.

The approach we have outlined is not just about creating visuals, collateral, or websites; it's about crafting an unparalleled experience and building a trustworthy reputation that sets XXXXXX apart in the ever-evolving data intelligence marketplace. I firmly believe that creativity must be driven by profound ideas to have a real purpose.

OUR STRATEGY WILL BE GUIDED BY THE PRINCIPLES OF  
KNOWING THE TRUTH, BUILDING TRUST, ACTING  
TRANSPARENTLY, AND DOING GOOD.

I am committed to understanding the unique differences of our target audience, leveraging cross-industry insights, interests, and internal expertise to create a captivating, tailored brand experience that stands out and delights.

Our program is designed to assist XXXXXX in defining a fresh visual aesthetic and tonal direction that resonates with your audience and sets you apart in the market. The two-phased process will lay the foundation for the evolution of your brand.

Our tentative schedule, which includes weekly check-ins with the COO and access to essential resources, ensures that we stay aligned with your goals and objectives.

In conclusion, I am excited about the potential of our partnership and the positive impact we can create together. As the project progresses, should you see the value and potential in our collaboration, the option to hire me full-time remains open at any point in the process. Together, we can achieve something truly extraordinary for XXXXXX.

Attachment: Consulting Contract