# **FM Questionnaire Answers**

#### Notes:

- Text in black is from FM questionnaire. Italicized bullets are mandated answer format, note the character limits on some.
- Leave dashes for itemized lists (minimal text formatting offered in Workday portal, but linebreaks will function)

### 1. Company Overview

- 1.1. How many years has your agency been in operation?\*
  - Short answer (140 characters max)
  - The MX+Bray partnership was founded 6 years ago and the two agencies combine for over 80 years of operation.
- 1.2. If you have affiliate agencies. a network of agencies, multiple offices do you share one P&L or have multiple P&Ls?
  - Short answer (140 characters max)
  - Separate answer
  - MX+Bray operate independent P&Ls but will contract and invoice as a single entity.
- 1.3. Share awards and recognition you have received for Business to Business (B2B) services sharing the client, examples of the work, and the geography it was for.
  - Joint answer
  - Long answer

We have been well recognized as a leader in B2B marketing with some of the more significant recognitions include:

- B2B Agency of the Year (North America, B2B Marketing)
- 6th largest global B2B agency (Global, B2B Marketing)
- 2nd largest independent B2B agency (US, B2B Marketing)
- 2nd fastest growing B2B agency (US, B2B Marketing)
- The only top 5 B2B Agency in the UK for 10 consecutive years (B2B Marketing)
- Content Marketing Agency of the Year (Content Marketing Institute)
- Supplier of the Year (our client HF Sinclair)

We have also been recognized for our agency culture and people:

- Best and Brightest Places to Work in the Nation for 3 consecutive years
- Best and Brightest Places to Work in Chicago for 8 consecutive years

- Platinum status from the IPA (Institute of Practitioners in Advertising) for our commitment to CPD and staff training, ensuring clients are always serviced by people of the highest caliber
- One of the first agencies to be awarded as an 'All-in Champion' in recognition of our commitment to ED&I

#### A selection of additional awards in recent years includes:

- o Horizon Interactive Award Gold: Social Media Campaign for Manheim Express
- o Horizon Interactive Award Gold: Website Corporate & B2B for WHOOP Unite
- Killer Content Awards (Finnys) Best Buyer-Focused Content for WHOOP Unite
- B2B Marketing Elevation Awards: Gold Best Use of Customer Insights for Envoy
- o ANA B2 Awards Bronze Demand Gen Small/Medium Business for Envoy
- Horizon Interactive Awards Gold: Video Commercial for Zekelman
- o Horizon Interactive Awards Gold: Video Motion Graphics for Grundfos
- o IPA (Institute of Practitioners in Advertising) Platinum Status
- Content Marketing Institute CMA Awards Best Integration of Purposeful Marketing Finalist for PMI
- Content Marketing Institute CMA Awards Best Use of an E-Book Finalist for PMI
- Content Marketing Institute CMA Awards Winner: Best Print Publication,
   Staples Worklife Magazine
- Academy of Interactive & Visual Arts (AIVA) w3 Awards Gold Award: General Series - Association Podcasts for PMI's Projectified podcast
- Davey Award Gold Award: "Podcast Series Advice" for PMI Projectified podcast
- SIIA/AM&P Excel Awards Gold Award: Social Media campaign PMI
- SIIA/AM&P Excel Awards Gold Award: Single Topic Issue AAJ The Civil Rights
- SIIA/AM&P Excel Awards Silver Award: Design Excellence NACS magazine
- B2B Marketing Awards Silver Award: Best Employee Engagement Programme for Viridor
- Digital Impact Awards Best use of Digital for a Charity or Non-Government Organization
- Digital Impact Awards, Transport & Logistics for mfldirect
- o Digital Impact Awards, Best Digital Rebrand, Silver for ofi
- o B2B Marketing Awards Bronze Award for Best Brand Initiative for ofi
- Digital Impact Awards Gold for best use of digital from the transport and logistics sector for mfldirect
- B2B Marketing Awards, Best Use of Direct Mail for Autino
- Digital Impact Awards, Best Industrial Campaign for Fugro
- Digital Impact Awards, Best Innovation Campaign for HS2
- o Digital Impact Awards, Best Website for Western Global

- B2B Marketing Awards, Best Event Marketing for UK Space Conference
- 1.4. Where are your agency locations? Please share the physical addresses.
  - Headquarters: 7020 High Grove Blvd. Burr Ridge, IL, 60527, United States of America
  - UK: The Old Rectory. Filleigh, Devon, EX32 0RX, United Kingdom
  - Singapore: 63 Chulia Street, OCBC Centre East, #15-01, Singapore 019514
  - Malaysia: 100.3.005, 129 OFFICES, Block J, Jaya One. No. 72A, Jalan Universiti
     46200 Petaling Jaya, Selangor Darul Ehsan, Malaysia
  - o Vietnam: Floor 3, 204C Nguyen Van Huong, Thao Dien Ward, District 2, HCMC.
  - Hong Kong: Room 1101 11/F, Cheung Sha Wan Plaza Tower 1, 833 Cheung Sha Wan Road, Lai Chi Kok, Kowloon, Hong Kong
- Offices from partner agencies we would use for on demand support
  - Australia: Level 21/207 Kent Street, Sydney, NSW 2000
  - Germany: Werbeagentur Stuttgart, Heinestraße 41 A, D-70597 Stuttgart
  - o South Korea: 37, Dosan-daero 54-gil, Gangnam-gu, Seoul
  - o France: 112 boulevard de la villette, Paris 19
  - Brazil: 1855 Brooklin Novo, São Paulo SP, 04561-004
  - Mexico: Av. Ejército Nacional Mexicano 769, Piso 2, Ciudad de México, Ciudad de México 11520
  - o India: 20, Santosh Heights, 39/4, J.N.Marg, Gultekdi Road, Pune 411037
- 1.5. Would the bankruptcy, non-payment, delayed payment, or ending any of the relationships with your key clients or suppliers adversely affect your operations?
  - Choice answer (Yes/No)
  - o No
- 1.6. What % of your revenue over the past year was with Business to Business (B2B) clients?
  - 100% of revenue for MX+Bray in 2024 was through B2B clients.
  - Short answer (140 characters max)
- 1.7. What is the last date of your fiscal year?
  - Short answer (140 characters max)
  - MX+Bray's fiscal year ends on December 31.

#### 2. Clients

- 2.1. What is the average retention rate and tenure of your clients?
  - Short Answer 140 Character Limit (Required)
  - Our retention rate is 83% and tenure is 3.6 years and growing

- 2.2. Does your agency or staff have experience working with companies or industries that are similar to Factory Mutual Insurance Company?
  - Short Answer 140 Character Limit (Required)
  - Combined answer need to craft for RM
    - We have vast experience working with large, global matrixed B2B organizations in manufacturing, industrial supply and financial services.
- 2.3. Do you currently have any commercial insurance clients? If so which companies?
  - Short Answer 140 Character Limit (Required)
  - MX+Bray do not currently represent any commercial insurance clients.
- 2.4. Are there, or do you foresee, any potential conflicts of interest by entering into a
  contract with our company? Failure to disclose conflicts of interest in advance could
  result in termination of the contract.
  - Multiple Choice Select One (Required) (Yes/No + Comments)
  - o No
  - There are no conflicts of interest that exist from MX+Bray partnering with FM to increase awareness of the brand.

### 3. Resources

- 3.1. What is the average tenure of your employees?
  - Answer separately
  - Short Answer 140 Character Limit (Required)
  - We're proud that the average tenure of the talent within the MX+Bray team is 8.9 years.
- 3.2. Do you use subcontractors to supplement your staff?
  - Multiple Choice Select One (Required) (Yes/No)
  - Yes
- 3.3. If your answer in 3.2 is Yes how do you source and screen these subcontractors, when do you use subcontractors, and for which services?
  - Long Answer (Required)
  - Joint answer
  - Counter to the approach of many agencies, we believe that having resources in-house is key to our success. All of our core services are led by in-house team members. When we rely on freelancers, we do so for specific skills and experiences to best serve a client's needs—such as specialized near-shore development, voice over talent, models, or on-the-ground needs like location photography and video production. We might also require specific industry insights or platform expertise key to a specific geographical region—such as Naver Band in South Korea.
  - To ensure we deliver the best for our clients, we follow a rigorous approach to sourcing and screening freelancers and subcontractors. We rely on a mix of professional networks, referrals, and industry-specific platforms to identify top talent with proven expertise in their field. Before engaging a subcontractor, we

- review their portfolio, check client references and often conduct a trial assignment to assess both skill level and compatibility with our team's way of working. If the requirement is spurred by a client need, we can directly involve our client's point of contact in the decision.
- Equally important, we evaluate subcontractors not just on technical ability but on their alignment with our values as an agency. This ensures they'll meet the high standard of collaboration, creativity and quality our clients expect.
- 3.4. If your answer in 3.2 is Yes, do you anticipate using contractors/freelance in support of FM's account?
  - Multiple Choice Select One (Required) + Comment
  - o Yes
  - We assume we will use some subcontractors for production specific expertise, in country activation support, etc.
- 3.5. How do you ensure client satisfaction?
  - Long Answer (Required)
  - Joint answer

We ensure client satisfaction by prioritizing strong, long-lasting relationships built on trust, understanding and shared goals.

- The shared goals we set are focused on commercial results, not just marketing KPIs, and we measure and review our progress against our goals on an ongoing basis. Ultimately, we succeed when our clients succeed.
- We strive to know our clients' businesses as well as they do, believing that 'working with your agency should be the best part of your day.' We actively identify opportunities to learn more by participating in business planning, doing ride-alongs with sales teams and doing site visits.
- To build trust, we are committed to transparency, clear communication and adaptability, ensuring we stay aligned with client needs. We tailor our processes, reporting and even pricing models to match each client's goals, supported by a stable, highly experienced team dedicated to delivering measurable impact.
- We proactively assess our relationships and ways of working with clients. Honest, two-way feedback about the partnership is key to its success. To foster this, we set up structured practices including regular governance calls, formal QBRs to solicit and discuss feedback and a semiannual client survey to formally gauge levels of satisfaction on strategic thinking, alignment on shared understanding of clients' businesses and verticals, innovative thinking, creative impact, as well as day-to-day operational questions such as on-time delivery, project management and value. Through formal and informal means, we are constantly engaging with our clients to ensure we are meeting and exceeding their needs.
- 3.6. Have you encountered client dissatisfaction, and how did you address it?
  - Long Answer (Required)
  - Joint answer

While rare, moments of client dissatisfaction can happen, and we see them as opportunities to strengthen relationships and improve outcomes. When an issue does arise, we have a structured approach to address it head-on by listening carefully, understanding the root cause and collaborating with the client to find a solution. We implement a clear action plan with our client stakeholders to address their concerns. 30-, 60- and 90-day check-ins formally ensure that the plan is working to address the ultimate sources of dissatisfaction, or adjust if necessary.

At all times, transparency is key—we're clear about what we'll do to resolve the concern and ensure alignment moving forward. Our adaptability and focus on long-term relationships help us turn challenges into opportunities to exceed expectations. Ultimately, our commitment is to deliver impact, and we work tirelessly to restore confidence and deliver the results our clients deserve.

### 4. Assignment

- 4.1. Please upload files for your Assignment.
  - File Request
- 4.2 Please share an example of your creative and content production capabilities in providing sponsorship support.
  - Long answer
  - We support sponsorships in three key ways:
    - Connect; we help strategically identify the right sponsorship opportunities to reinforce brand values, plus negotiate and contract with properties
    - Create; we develop the sponsorship narrative and experience, plus create campaigns and collateral
    - Communicate; we develop the comms and activation plans that ensure businesses and their customers hear about and get value from the sponsorships—from social media and influencers to PR, events and hospitality
  - One example of our sponsorship support in action is with our client HF Sinclar, whose Petro-Canada Lubricants have sponsored a range of sports properties over a number of years including Liverpool Football Club, FIA Truck Racing Championship, IndyCar racer James Hinchcliffe, and, more recently, PGA pro Harrison Endycott and a start-up EV racing team:
    - We have developed creative content that creates strategic alignment and relevance to the sponsorship. For example, Petro-Canada Lubricants provides the specialist fluids that make machinery perform at their best.
       To create alignment and relevance our content with Liverpool Football Club focused more on the 'team behind the team'—the nutritionists, analysts and physios that made the team perform on the day as an equivalence to the role their products play for customers.

- We develop the customer entertainment for their best performing distributors, including private appearances and motivational talks
- We produce content and campaigns where the sponsorship adds value and recognition in new markets they are keen to develop a foothold in—in particular in markets in Asia
- View our sponsorship content at: MX+Bray HFSinclair Sponsorship Examples www.TheMXGroup.com/FM/ (PW: FM-portal)

### 5. Account Management and Team

- 5.1 How will you support FM globally and locally?
  - Long Answer
  - Joint answer
    - We have a proven model that balances global consistency and efficiency with local adaptability. It comprises three key components:
    - 1. Set the global to local framework:
      - Global Governance: We will set up a global core team as the central point of coordination, ensuring alignment with FM's global strategy, brand guidelines and overarching messaging. In effect, this team works as global brand guardians to oversee consistency, quality and efficiency across all markets. The global core team comprises a consistent retained team engaged in every aspect of the FM relationship.
      - Global Activation and Production: Broader agency resources are in place for Global Activation & Production when and where needed. While their work will be overseen by the global retained team to ensure consistency and efficiency, we expect FM to have direct access to this team as well for on-demand support and planned activities.
      - Local Expertise: For each key market (Mexico, Australia, USA, UK, France, Germany, India, South Korea) we will have local specialists on the ground, ensuring we leverage in-market experts to understand cultural nuances, media consumption habits, regulations and the sales process applicable for each region.
    - 2. Build the global creative strategy
      - We will craft the global campaign and content themes with messaging that resonates globally, while designing assets that are flexible enough to be customized by region. We will ensure local teams are an integral part of this process and the global work is driven by a universal human truth.
    - 3. Deploy a tech-enabled process
      - We will use a centralized project management platform (typically we prefer to use Trello but can be flexible to specific client

- requests), to ensure seamless communication and tracking of deliverables globally.
- We will employ a digital asset management system to share approved templates, guidelines and campaign materials with local teams.
- We will leverage the latest AI tools to drive efficiencies in content creation and translations. We have deployed tools like writer.ai to great impact with clients where we can reduce 80-90% of the legwork using AI.
- We will develop a dashboard to report the performance of global campaigns and content, allowing us to measure market-specific metrics, compare content performance across regions and refine strategies accordingly.
- 5.2 Define the core team and their individual roles/responsibilities on the account.
  - Long answer
  - The retained global core team is in place to ensure the work and our relationship are on track and we're delivering an impact to your business. This team includes leaders you have met already in the pitch process, who will be needed day in and day out to deliver strategic and conceptual work, while also activating additional on-demand talent across the agency. The type of work this team will produce will be:
  - Goal setting, measurement and insights
  - Market research, voice of customer
  - Go to market strategy and planning
  - Editorial strategy and content planning
  - Sponsorship strategy
  - Demand and ABM strategy and program planning
  - Campaign and creative concepts
  - Hero asset creation
  - Program and project management
  - Inter-agency collaboration

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- The global core team members and their roles are:
  - Otto Hektor, Managing Director Strategic and business support and oversight
  - Laura Sarnicola, Account Director Strategic partner, program lead, agency alignment
  - - Megan Ryan, Senior Account Manager Project management, program execution
  - Sam Crocker, Managing Partner Global Alignment, Governance and Operations
  - Emma Cottle, Senior Account Manager Program support, Local market management

- Anca Rhone, Group Planning Director Lead strategist, voice of customer
- Gideon Arroussi, Planning Director (UK) Global Insights, GTM planning, localization strategy
- Beth Gaston, Senior Content Director Editorial and content strategy
- Matt Binz, Senior Director MarTech and Applied Intelligence –
   Performance measurement, Data Intelligence
- Jen O'Brien, User Experience Manager UX/UI and digital strategy
- - Emily Kleist, VP and Executive Creative Director Creative Governance
- - Allen Morgenstern, Creative Director Overall creative ownership
- Ray Johnson, Senior Copywriter Copy lead for FM
- Kat Kuda, Senior Art Director Design lead
- Jason Webb, Senior Art Director Conceptual design (UK)
- Pete James, Senior Copywriter Conceptual copy (UK)
- For more details on their background and bios, view MX-BRAY CORE TEAM FOR FM at www.TheMXGroup.com/FM/ (PW: FM-portal)
- 5.3 How do you ensure integration between functional teams / departments and across different offices within the agency?
  - Long answer
  - We take three key steps to ensure integration between teams and across agencies.
  - Creating alignment on your goals and the work provides tangible and agreed-upon metrics to measure our efforts against. Establishing core program KPIs makes it easy to understand how work is aligned with your ultimate business objectives. You can read more about how we structure measurement frameworks in questions 6.1 and 6.2. Through clear program KPIs, it's easy to recognize when efforts are not aligned with ultimate goals.
  - Establishing a strategic roadmap at the beginning of the relationship grounds all involved on what we are ultimately working towards and clearly frames specific tactics and projects within the big picture strategy. Through regular governance meetings, QBRs and annual planning, we evolve and revise these plans over time.
  - The most important way we ensure integration between teams, departments and offices is through establishing the core team serving each client. This team provides consistency, acts as subject matter experts about your business and holds line of sight across teams and projects. All work and communications flow through this team, ensuring that when agency resources outside the team are engaged, they are guided by team members steeped in your business. We support this on a day-to-day basis through clear, structured ways of working. As discussed in question 5.4, we establish a common set of tools, documents and processes that enable integration and consistency.
- 5.4 Briefly detail what client-facing communication tools and systems the agency uses to provide client service and drive collaboration with clients.

- Long answer
- We deploy a range of tools for clients, frequently working in their systems when desired. These tools often include Monday.com, Trello, Basecamp and Jira for project management and Slack, Google Chat and Teams for communications and collaboration. These tools contribute to providing full transparency and up-to-date information regarding the status of every job and agency task.
- For global clients especially, we deploy simple bespoke portals that hold common documents, provide digital briefs and project documents, and outline processes; they also provide the contact details of the agency team members. This ensures that our clients can easily initiate work and find the right contact to connect with. Additionally, we established standardized libraries of templates so that all parties are working from the same materials.

### 6. Agency Tools, Reporting

- 6.1 How do you measure the performance/effectiveness of your services?
  - Long answer
  - We measure effectiveness by first aligning with our clients' strategic goals. This
    begins with in-depth discovery sessions to understand their business objectives,
    challenges and opportunities. From there, we develop KPI ladders that connect
    these goals to actionable metrics at the program and tactical levels, ensuring
    alignment across all efforts.
  - Our measurement approach focuses on three key areas: activity, brand and revenue, with specific metrics aligned to each (see more about these below in 6.2).
  - We employ a multi-layered measurement framework to deliver insights at three levels. First, we analyze directly attributable metrics tied specifically to initiatives, such as lead volume and conversions. Second, we identify indirect signals, such as increased website traffic or improved sentiment, which indicate broader program impact. Finally, we conduct correlation and causation analysis to uncover trends and relationships between marketing activities and business outcomes. This holistic approach ensures that we provide actionable data and recommendations that drive continuous optimization.
- 6.2 What are key metrics you use to measure success and what is the reporting framework for that measurement?
  - Long answer
  - We align success metrics with program goals, focusing on activity, brand and revenue outcomes.
    - For activity, we measure a range of performance indicators depending on the campaign and execution types. These include media impressions, click-through rates, cost-per-click, content downloads, video completion rates, web and landing page performance, email circulation and physical metrics such as foot traffic for in-person events or activations.

- - For brand, we track metrics such as share of voice, sentiment analysis and brand lift studies.
- - For revenue, we evaluate key financial metrics such as pipeline contribution, conversion rates, average deal size and deal velocity to determine the business impact of our programs.
- Our reporting framework is designed to deliver insights at multiple levels. Executive dashboards provide high-level summaries that track progress toward strategic goals, while campaign-level reporting offers in-depth performance analysis and identifies optimization opportunities. In addition to providing actionable recommendations to refine programs and maximize return on investment, we conduct regular performance reviews with clients—typically monthly or quarterly—to ensure alignment, evaluate progress and adjust strategies as needed. These reviews are supported by detailed reports delivered through platforms such as Tableau and Datorama, tailored to meet client-specific needs.
- 6.3 How do you benchmark performance data against competitors, and provide competitive analysis?
  - Long answer
  - We benchmark performance using a combination of tools and methodologies. Digital benchmarking leverages platforms such as SEMrush, Moz, Talkwalker and Meltwater to analyze competitors' SEO rankings, the share of voice, paid media activity and content engagement. We also leverage industry data sets to analyze competitive media spending via Kantar. To provide a broader context, we compare client performance against industry norms and trends, sourced from our own experience across a wide range of industries as well as analyst groups such as Forrester, B2B Marketing/Propolis and Demand Gen Report.
  - Additionally, we incorporate insights from industry-insider reports, analyst perspectives, and targeted interviews to guide our focus and uncover deeper competitive insights. By integrating these data points, we deliver a comprehensive analysis of gaps, opportunities and strategies to help our clients outperform competitors.
- 6.4 List the primary proprietary analytic components and planning tools you will use in servicing FM's business.
  - Long Answer
  - To service FM's business, we use a combination of industry-standard tools and proprietary frameworks. Our KPI laddering framework aligns strategic goals with program and tactical metrics, ensuring all efforts are directly tied to measurable outcomes. Our "Thought Leadership Index" is a proprietary measurement system designed to assess and benchmark a client's standing in thought leadership compared to competitors.
  - We leverage tools such as Tableau and Datorama for centralized reporting and insights. Competitive analysis and benchmarking are powered by platforms like Kantar, D&B Hoovers, SEMrush, Moz, Talkwalker and Meltwater, which help

- track media spending, firmographics, SEO performance, share of voice and brand sentiment.
- Additionally, our Data and Insights team leverages various first- and third-party data sets to build our "Market Maps"—strategic tools often used to support our competitive analysis, media targeting and activation areas.
- This toolkit combines proven industry platforms with proprietary methodologies, providing a robust foundation for planning, measurement and optimization.
- 6.5 Are any of these tools proprietary to the Agency? If so which ones?
  - Long answer
  - Yes, several tools and frameworks are proprietary to our agency. Our KPI laddering framework is a custom-developed process that aligns goals with metrics, ensuring strategic focus and measurable outcomes. Our market map processes use our proprietary research and data visualization processes to reveal market insights. We also create custom dashboards tailored to each client's needs, providing seamless integration of data from multiple sources for actionable insights. Our "Thought Leadership Index" is proprietary methodology developed in-house. You can read more about the Thought Leadership Index at: TheMXGroup.com/thought-leadership-index/
  - These proprietary tools differentiate our approach, enabling us to deliver unique and highly effective solutions for FM.
- 6.6 Please also list any measurement or brand tracking tools you would recommend.
  - Long answer
  - Assuming your media agency partner(s) are able to provide media activation data across all channel types and placements, we'd also recommend organic search measurement and analysis tools like SEMRush, Moz Pro, STAT (Moz Family) or similar as well as brand monitoring tools such as Talkwalker, Meltwater or Quid.
- 6.7 Indicate which tools have additional out of pocket costs and what those costs are.
  - Long answer
  - Exact out-of-pocket costs for FM will be determined by the level of data usage and/or ongoing use. There are tools we will use on behalf of our work for a client that are passed through, others that we recommend the client acquire on their own in support of their programs.
  - As we engage in planning with you, we anticipate that we may recommend several software platforms for you to license. These would potentially include a sales enablement platform, Digital Asset Management system and secure enterprise AI platforms (such as Writer).
- 6.8 Indicate which tools are accessible to the client, at no additional cost.
  - Long answer
  - With the exception of reporting tools such as Tableau or Datorama, most of our tools are limited to internal agency team members only. In cases where clients need to have access, we will facilitate that on a limited basis or recommend where it makes more sense for our clients to own and manage access to the tools. These positions are based on data privacy and security policies that we enforce internally and recommend clients do the same.

## 7. Bid - Staffing and Compensation

- 7.1 Upload your completed Agency Staffing Template here.
  - File Answer
- 7.2 If your agency is selected to move forward and negotiate a contract for services, would your agency be willing to attend FM Marketing 2025 planning meetings in January 2025 (to be scheduled) to be able to listen to our objectives for the upcoming year, if a contract is not yet finalized and at at no cost to FM?
  - Choice Answer (Yes/No + Comments)
- 7.3 If your agency is selected would you accept the attached Information Security Requirements as attached in your contract with FM? If "No" - please redline what aspects you cannot comply with and upload the document.
  - Choice Answer (Yes/No + Comments)
- 7.4 If your agency is selected would you accept the attached General Contract Insurance Terms and Conditions as attached in your contract with FM? If "No" - please redline what aspects you cannot comply with and upload the document.
  - Choice Answers (Yes/No + Comments)