

# Branding Proposal

Prepared for:

Cleversafe

July 12, 2013



# Contents

Overview .....	3
<i>The Persuasive Process</i> .....	4
Five Rings of Insight .....	6
Persona Development .....	7
Cost Summary .....	8
Your Team .....	9
About The Mx Group .....	12
Our References .....	13



# Overview

Thank you for the opportunity to work with Cleversafe on this initial—and important—branding project.

Our first meeting left us excited about Cleversafe—both as a company and as a client of The Mx Group. But we also gleaned some insights about you and your branding needs:

- You're not a start-up and this is not a "launch." The experiences you've gained and the customer stories you can articulate are essential to communicate to a sometimes skeptical audience.
- The market has evolved in the five years or so since your first customer experience, and your message now needs to focus more on the use of technology than on the technology itself.
- In the same vein, the "us" in your current communications mix needs to shift to a "you" focus.
- The Yahoo sale cycle example illustrates the need for your overall brand to encompass messaging to specific buyer types.
- Your sales team needs to be part of the process to ensure that the brand platform and subsequent support tools are easily understood and useable.

While there is a lot more for us to learn, we feel the resources and experience of The Mx Group offer a strong match to your objectives, and we look forward to moving this process to the next stage. On the following pages, you will find a description of the branding and persona development process we are recommending for Cleversafe, along with our cost estimate.

Again, thank you for this opportunity.



# *The Persuasive Process*

## INSIGHTS

### **Stakeholders Questionnaire**

We ask key members of your organization to complete a comprehensive questionnaire. The answers give us insight into your company's stakeholders perspectives on your competitive position, differentiating benefits and long-term marketing goals.

### **Competitive Research**

A thorough audit of your key competitors to help us gauge your position in the marketplace.

### **1:1 Interviews**

In order to gain qualitative customer perspective into your message and brand, we conduct deep 1:1 interviews with customers, lost deals, and prospects.

### **E-Survey**

In order to gain quantitative customer perspective, we conduct a broad survey will go to key customer and prospect contacts requesting their input and insight.



## STRATEGY

### **Consensus Meeting**

Following completion of the research, questionnaires and interviews, The Mx Group and Cleversafe teams will meet to review and discuss the results, balancing the internal perspective with the external research, and coming to agreement about the core underpinnings of the brand strategy.

### **Brand Definition**

Using the strategic foundation agreed to in the consensus meeting, The Mx Group will develop a unique brand definition acts as the “flag on the horizon” at which all future marketing communications are aimed.

## CREATIVE EXECUTION

### **Brand Concepts Presentation**

Using the approved Brand Definition as our flag on the horizon, The Mx Group develops three sets of creative executions that show how the brand definition can be brought to life in the real world of websites, logos, ads, collateral or other media. You will see three unique paths but each one will fully support the brand as it’s been defined.



# Five Rings of Insight

## **Priority Initiatives**

What causes certain buyers to invest in solutions like yours, and what is different about buyers who are satisfied with the status quo?

## **Success Factors**

What operational or personal results does your buyer persona expect to achieve by purchasing this solution?

## **Perceived Barriers**

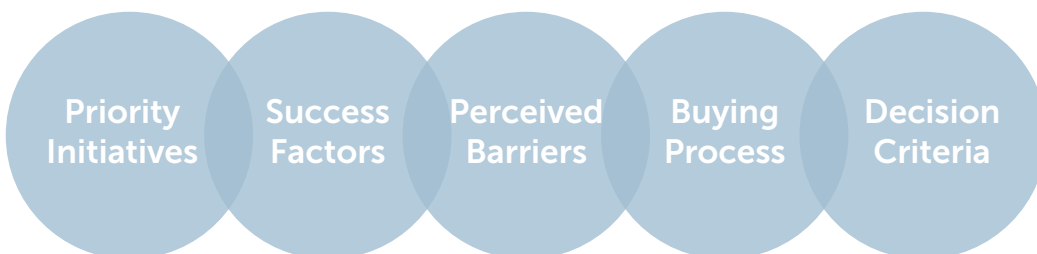
What concerns cause your buyer to believe that your solution or company is not their best option?

## **Buying Process**

Sometimes known as the buyer's journey, this insight reveals details about the steps your buyer takes to evaluate their options and select one.

## **Decision Criteria**

Which aspects of the competing products, services, solutions or company does your buyer perceive as most critical, and what are their expectations for each?



# Persona Development



## Buyer Personas

Using the all the insights gathered, the Mx Group will produce buyers personas for your key buyer archetypes. These personas prove invaluable to ongoing sales and marketing initiatives.

## Why Personas?

- Personas are an essential reminder that this is about human persuasion (and all that implies)
- Personas are natural/Memorable/Usable = Actually Used
- Personas focus marketers on critical contrast points between buyers (irrelevant complexity fades away)
- Persons can be understood in their relation to other personas... how they "sell" to each other
- Personas can be useful outside of marketing... for sales training... for product development... for HR... Etc.



# Cost Summary

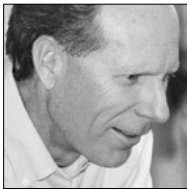
Deliverable	Budget
<i>The Persuasive Process</i> Brand Strategy	\$50,000
Stakeholders Questionnaire	
Competitive Research	
One-on-One Interviews	
Consensus Meeting	
Brand Definition	
Brand Concepts Presentation	
Buyer Persona Design and Development	\$15,000
Extended Research and Interviews	
Compilation, Collaborative Review and Consensus	
Persona Finalization (3–4 Personas)	





# Your Team

When you work with The Mx Group, you can count on a superior team of professionals with years of experience solving marketing and sales challenges for a wide variety of industries and clients.



## **Andrew Mahler, CEO & Founder**

Andy co-founded The Mx Group in 1989 and led it to become a consistently profitable organization by providing vision, sales and marketing leadership, and professional discipline. Prior to founding The Mx Group, Andy spent eight years in a managerial capacity at Omnigistics Inc., a West Coast marketing services firm. He has provided strategic marketing guidance and management to hundreds of global business-to-business companies. Andy holds a degree in Business Administration, Marketing, from California State University at Chico, and has served as a faculty member for the Direct Marketing Association's Collegiate Institute, teaching B2B direct marketing methods.



## **Peter C. Wroblewski, Principal & Founder**

As co-founder of The Mx Group, Pete provides strategy and leadership in many areas of the organization, including sales and marketing, operations and customer experience. Pete and Andy worked together to pioneer many of the concepts that are central to the firm's database and response management services, including the focus on ROI. Life before The Mx Group included several senior-level positions with Continental Illinois Bank, Nevada Pay Television and Omnigistics. Pete holds a B.A. in finance from Illinois State University.



**Tom Barg, Vice President & Executive Creative Director**

Tom brings more than 15 years of business-to-business design expertise to the table. He is highly skilled at developing core branding and messaging platforms that produce short term and long term results for global clients. Tom oversees the The Mx Group Creative Services Department and has been with The Mx Group for over 10 years. Prior to The Mx Group, Tom was director of Creative Services for a major technical publishing house. Tom holds a B.A. in fine arts from Loyola University Chicago and achieved an MFA from Rochester Institute of Technology.

**Tim Cook, Vice President of Client Services**

Tim has more than 15 years of in-house and agency-side marketing and communications experience for a broad range of global companies including Convergys, Intel, SAP, AT&T, Charles Schwab, HP and Sun Microsystems. Tim is responsible for overseeing the The Mx Group Account Services department. Prior to joining The Mx Group, Tim held senior management positions in corporate marketing, product marketing and corporate communications. Tim completed his B.A. in english literature with concentrations in communications and political science from Stonehill College in North Easton, Massachusetts.

**Scott Falvey, Associate Creative Director**

Scott brings more than 15 years of experience leading creative teams, including extensive experience in online lead generation strategy and management. Before joining The Mx Group, Scott held a dual role as both creative and marketing director at a leading legal services firm in Chicago. At The Mx Group, Scott leads a team of creatives to develop fully integrated marketing campaigns. He graduated from the University of Notre Dame with a B.A. in Design.





**Kellie de Leon, Account Supervisor**

Kellie brings more than 10 years of integrated marketing experience to her clients. Serving in both client- and agency-side roles, she has devised and implemented dynamic strategies across a wide variety of channels including direct mail, digital, social media, print, television, radio and telemarketing. Prior to joining The Mx Group, Kellie directed multi-channel marketing efforts for large international non-profit organizations. Kellie holds a B.A. in communications and theatre from Marquette University in Milwaukee, Wisconsin.



**Emily Slayton, Senior Copywriter**

Emily brings more than 10 years of print and digital copywriting experience to The Mx Group. Her talents lie in developing clear, engaging content that elevates brands and inspires action. She holds a B.A. in journalism from the University of Missouri-Columbia, and prior to joining The Mx Group she was the lead copywriter for consumer and business-to-business brand marketing at Groupon.



# About The Mx Group

The Mx Group is a marketing and technology services company that seamlessly integrates and delivers digital, creative and sales enablement services for our clients. We are a collection of creative problem solvers, including marketing strategists, business analysts, designers, writers, programmers, data specialists and sales management experts. All bringing unique skills and perspectives while contributing to our common mission of helping companies **excite** markets, **engage** customers, **effect** sales, and **embed** value.



# Our References

## **vAuto**

### **Dale Pollak**

Chairman & Founder

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Oak Brook, IL 60523

630.590.2000

dpollak@vauto.com

A client since 2006, vAuto developed a ground-breaking inventory management for the retail automotive industry, providing dealerships with a better way to appraise, manage and price pre-owned inventory, the source of most dealership profits today. The Mx Group provides full service capabilities to vAuto and has developed the branding and corporate identity platform, and the launch strategy for every product that vAuto has engineered. This includes an optimized website, trade advertising, video development, demo design and development, trade show support and all online and offline lead generation efforts.



**Catamaran****Susan Fleming**

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Catamaran is a growing \$14 B company at the center of the rapidly changing healthcare landscape. As a leading pharmacy benefit manager, Catamaran's innovative technology and clinical solutions connect pharmacists, doctors, caregivers and patients to improve health outcomes while lowering prescription drug costs.

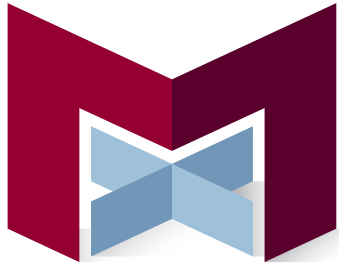
The Mx Group provides brand and message strategy, website design and support, strategy and development of interactive video content for Catamaran's Innovation Center, collateral design, recruiting strategy and branding, trade show design, and investor relations design including annual reports and presentation materials.

**Siemens Industry****Scott Conner**

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A client since 2009, Siemens is the leading manufacturer of medium voltage variable frequency drives in the world. The Mx Group initially worked with Siemens on a channel management solution for its independent sales representatives. Over the years, our relationship has grown into a Total Market Experience program including direct marketing materials, web design, video development, buyer persona development, market sizing and marketing database development.





The Mx Group

[TheMxGroup.com](http://TheMxGroup.com)