



The Mx Group

Lightspeed Systems  
**Demand Generation Engine Program**

July 17, 2020

# Agenda

- Your Needs
- Our Approach
- Program Plan Details
- Your Team
- Why Partner With Mx
- Next Steps

# Your Goal

***Build an effective and marketable demand generation engine to meet growth goals and position company for acquisition.***

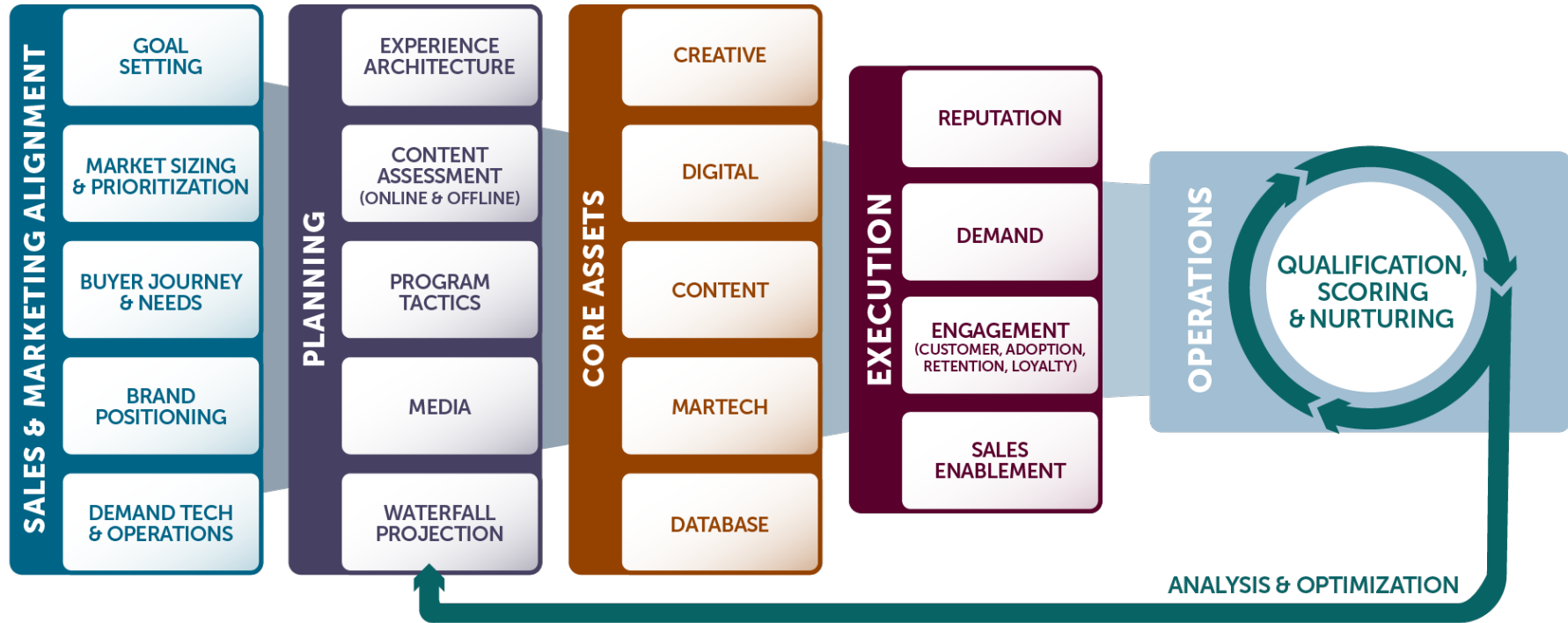
# Your Needs

- Better visibility throughout the pipeline.
- Ability to hold marketing and sales teams accountable.
- Online behavior insights to drive optimized demand generation campaigns and nurtures.
- A website that...
  - Excites your market and reflects your leadership position
  - Delivers content and conversion paths for expanded set of personas, all phases of the buyer journey
  - Facilitates high levels of engagement and conversion
  - Delivers a deeper experience for international buyers, to meet international targets

# Your Needs

- Content planning to strategically address buyer persona content needs across the journey.
- A strong POV on a consistent reporting schema agreed to by both marketing and sales.
- A framework and approach to future demand generation campaigns.
- A centralized marketing database that delivers audience behavioral insights to all marketing and sales parties.
- Automation to reduce lift on internal teams while still upholding demand generation best practices.

# Our Model



# Program Guiding Principles

- We know you need to move fast
- No recommendations away from current tech: what you have today will give you the flexibility and functionality you need
- Program plan designed to focus on what matters: activities that add value
- Program plan balances strategy, planning and execution for best-of-breed demand gen engine solution
- Built in parallel pathing and iteration where possible
- Clarity on activities, sequencing, stakeholder obligations and outputs from day one so team can hit the ground running

# Program Elements

Strategic Inputs

Martech Planning  
& Configuration

Website Planning  
& Production

Campaign Strategy  
& Core Assets

Optimization  
& Support

The background features a light blue gradient with a complex geometric pattern. It includes several overlapping circles of varying radii and a network of thin, intersecting lines that form a web-like structure. Three small dark blue dots are positioned at key intersections: one at the top center, one on the right side, and one on the left side. The overall aesthetic is clean, modern, and technical.

# STRATEGIC INPUTS

# Our Approach

**Focused** not blue sky  
**Iterative** not bottlenecking  
**Additive** not duplicative

# Executed Against A Clear Plan

- Objectives
- Meeting agendas
- Inputs needed
- Output expected
- Participants and duration

Topic	Objective	Agenda	Duration	Participants	Mx Pre-Work	Mx Send Aheads	Mx Output
<b>Kick-off</b> Welcome Kick-off	Get key stakeholders aligned on process, timeline and responsibilities	Intro and role on team Key website process Major milestones and project dependencies Timeline and meeting sequence Identification of client stakeholders, RACI definition, review Topic coordination High priorities and what to expect: how to manage risk	2 hours	Subject: TBD Mr. GAO, BA, PM	Meeting objectives and agenda Overall timeline & dependencies Expectations on review cycle Dates targeted for discovery meetings RACI setup Kick-off deck creation	Meeting objectives and agenda Project RACI RACI format	Confirmed timeline Project RACI Process Management Guidelines Executive summary of the above to share with wider stakeholder team
<b>Business Background</b> Business Background	Provide the team with a 10,000 foot view of the business to allow for context within the day before the subsequent sessions	Company overview Brand positioning addendum (and impact on brand guidelines) Competitors / your differentiator Build & marketing team structure Combination of product, business, sales, marketing	2 hours	Subject: TBD Mr. GAO, AM, UX, BA, PM, CD	Meeting objectives and agenda GSA structure and/or deck creation that probes beyond what we learned in the RFP	Meeting objectives and agenda	Initial conclusions for the today's meeting conclusions means that will be maintained over the course of discovery
<b>Target Markets &amp; Personas</b> Target Markets & Personas	Provide the detail on target markets & audience to inform information architecture and content needs	Overview of target market % of revenue for each % penetration vs. % opportunity within each Business priorities Personas Walk through of current persona documents Identify persona priorities for the website Review lower journey & needs at each stage Validate experience mapping: conversion goals Lead definition and lead management strategy	2 hours	Subject: TBD Mr. GAO, AM, UX	Meeting objectives and agenda Spreadsheet: table to guide target market prioritization effort Guidance on the persona inputs we need Review journey Needs at each stage Validate experience mapping 1 stage of thought	Meeting objectives and agenda Market prioritization template Persona guidance	Target markets mapped to priorities Business value, especially Top level buyer journey map for key personas Lead definitions and processing, and any differences by market or persona Update to meeting conclusions
<b>Stakeholder Survey</b> Stakeholder Survey	Collect inputs from the target market stakeholders prior to the website development, audience and what is and isn't working today	Give the first hand credibility into a day to the Mx as your sales team is help shape our perspective on brand and sales needs	1 day	Subject: broader stakeholder group	Stakeholder survey development and setup in SurveyMonkey Email or meeting to set expectations for stakeholder team		
<b>Sales Kiosk Along</b> Sales Kiosk Along	Give the first hand credibility into a day to the Mx as your sales team is help shape our perspective on brand and sales needs	Sales kiosk along	Full day (on-site)	Subject: TBD Mr. GAO	Call to get content on the proposed web encounter during the site		
<b>Performance Benchmarking</b> SEO / SEM / Conversion Audit	Review current site performance to determine areas of strength and weakness	Client to complete SEO worksheets and grant Mx access to Google Analytics Mx to complete SEO / SEM / Conversion audit	1 day	Subject: TBD Mr. GAO, AD, UX	Send SEO report Access to Google Analytics		

# Upfront Discovery & Strategy Meetings

## Session 1: Program Kick-off

- Get key stakeholders aligned on process, timeline & responsibilities.
- Get to know full Mx team.

## Session 2: Business Background

- Provide Mx with background to guide recommendations.
- Includes dive into goals, market segments, personas, positioning, competitors & team structures.

## Session 3: Product Deep Dive

- Provide Mx detail on platform & product capabilities & differentiators.
- Provide Mx detail on product organization to inform lead management discovery efforts and website information architecture.

## Session 4: Buyer Journey Workshop

- Cross-functional facilitated session to identify and document buyer persona needs across journey.
- Identify existing or new content needs.

## Session 5: Brand Standards

- Align Mx with your brand guidelines, where there is flexibility and what should remain locked in so website creative connects to the brand in ways that you envision.

# Stakeholder eSurvey

- Quick capture of inputs from a broader set of stakeholders
- Designed to begin from what the team already knows to uncover deeper inputs
- Question areas:
  - Audience needs and search habits
  - What is and is not working today
  - Website objectives and wish-list items
  - Content needs
  - Sales enablement needs

# Buyer Journey Mapping

- As buyers move through a buying journey, they are essentially resolving questions
- Helping a buyer advance through their buyer journey is proven to increase the chance of a solution provider winning the deal
- Hooking buyer earlier in their journey provides an opportunity to accelerate the process and lead the buyer to your solution, exclusively
- Our Buyer Journey Mapping Workshop facilitates a table-top exercise with a cross-functional team to capture:
  - Critical questions the buyer needs to resolve at each stage of the buyer journey
  - What online & offline behaviors may correspond at each stage
  - Content that is available or needs to be created to resolve questions
- Outputs of session
  - Mapped buyers journeys for each persona
  - Content ecosystem

**BUY CYCLE INSIGHTS**  
MARISSA MARKETING

Product / Solution: Reservation Sales and Marketing Automation Platform

EDUCATION PHASE				SOLUTION PHASE				VENDOR SELECTION			
Asking				Solution				Vendor			
Content Needs				Content Needs				Content Needs			
1	2	3	4	5	6	7	8	9	10	11	12
FOCUS/THEME	FORMAT	PURPOSE	FOCUS/THEME	FORMAT	PURPOSE	FOCUS/THEME	FORMAT	PURPOSE	FOCUS/THEME	FORMAT	PURPOSE
1 Opening doors	Video	Show how NAVIS' enterprise solution opens the door to more capabilities and more guests.	2 Dropping barriers	1-pager, email, video	Show how marketers can get easy access to their data for reporting and segmentation with NAVIS.	3 Any way you slice it	1-pager, email	Share all the data segmentation possibilities available with NAVIS.	4 Simplicity & performance	1-pager, email	Highlight the easy-to-use and set-it-and-forget-it features of Reach that enable small marketing teams to achieve more.
5 Outbound at its best	elbook, webinar	Explain the best way to execute an outbound effort by both phone and email.	6 Top 10 automation triggers	elbook, webinar	Share examples of triggers that can increase conversions, especially highlighting those that can only be set with NAVIS.	7 Marketer success stories	Video, 1-pager, email, website	Share success stories from the point of view of the marketer, explaining where they started and what they were able to achieve with NAVIS.	8 Success sound bites	Video	Use customer testimonial videos to create quick, bite-sized stories.
9 We can help you, too	Personal email	Share a prep or sound bite of a marketer success story as a similar property's identity in Marissa's competitive set, to pique interest.	10 The key to database growth	Infographic	Feature stats that highlight how better lead capture on phone calls can drive database growth.	11 Product guides	Brochures	Leave behind a product guide that addresses Marissa's top concerns 2 versions: Reach and Narrowcast Enterprise.	12 Pricing	1-pager	Provide component-based pricing that gives a core product cost and optional add-ons to Marissa knows she has flexibility based on what she needs. Two versions: Reach and Narrowcast Enterprise.

Prepared by **The Mx Group**  
TheMxGroup.com

# Optional: Market Maps

## What is a Market Map?

- A visual display of how you view your overall market with colors illustrating sales and marketing priorities.
- Contains definitions, profiling and counts for industries, sectors and segments you sell into

## Why develop Market Maps?

- If there is lack of clarity or alignment around ideal customer profile, segment profiles or prioritization
- If there is lack of visibility in addressable market sizing leading to inability to understand current penetration for growth planning or territory activity planning.

		OIL & GAS INDUSTRY														
		Upstream						Midstream					Downstream			
		Production		Drilling	Well Stimulation		Transportation and Pipelines					Processing				
		Crude petroleum and natural gas	Natural gas liquids	Drilling oil and gas wells	Artificial wells	Hydraulic fracturing of wells	Servicing oil and gas wells	Crude petroleum pipelines	Natural gas pipelines	Pipelines and other conveyance systems	Natural gas transmission	Natural gas storage and distribution	Natural gas distribution	Gas production and/or distribution	Petroleum refining	
SIC #	1311	1321	1381	13800101	13800102	13899901	13899912	13899913	4622	4631	4629	4922	4923	4924	4925	2011
Total Location Count	7526	594	3,571	59	41	8,724	791	496	398	1,969	998	1,995	989			2,523
Target Groups		Firmographics														
Low voltage air-cooled drive																
Segment 1	Less than \$1 million annual sales volume, 5-10 total employees company-wide, United States locations.	158	2	28	0	0	8	13	8	0	42	35	36	2		67
Segment 2	Less than \$1 million annual sales volume, 5-10 total employees company-wide, North American locations.	129	4	20	0	1	32	13	4	2	30	13	29	11		44
Segment 3	Less than \$1 million annual sales volume, 5-10 total employees company-wide, Global locations.	367	16	76	0	3	84	144	17	10	52	22	85	6		78
Medium voltage air-cooled drive																
Segment 1	\$10-150 million annual sales volume, 100-499 total employees company-wide, United States locations.	655	0	7	5	11	811	195	156	38	758	151	487	81		625
Segment 2	\$10-150 million annual sales volume, 100-499 total employees company-wide, North American locations.	667	90	354	13	5	1,182	159	144	57	594	260	475	141		141
Segment 3	\$10-150 million annual sales volume, 100-499 total employees company-wide, Global locations.	5,436	372	2,596	41	14	9,327	244	159	231	776	504	724	585		1,219
Medium voltage water-cooled drive																
Segment 1	\$1-10 billion annual sales volume, 1000-4999 total employees company-wide, United States locations.	6,393	534	2,821	34	35	4,754	645	470	233	1,756	830	1,703	783		1,955
Segment 2	\$1-10 billion annual sales volume, 1000-4999 total employees company-wide, North American locations.	1,110	72	632	5	6	3,975	143	24	135	120	159	237	98		433
Segment 3	\$1-10 billion annual sales volume, 1000-4999 total employees company-wide, Global locations.	23	6	118	0	0	15	3	2	30	13	9	55	108		135

KEY

Exact Target

Target

Unimportant

Not A

KEY	
Ideal Target	Green
Target	Yellow
Unimportant	Red
NA	Grey

# Optional: Market Maps

## Activities include:

- Obtain and analyze past customer data
- Obtain key stakeholder inputs
- Determine target segments and corresponding SIC/NAICS codes
- Define sectors and segments within each target industry
- Populate map with relevant counts
- Review preliminary maps and prioritize
- Finalize market maps

		OIL & GAS INDUSTRY															
		Upstream						Midstream				Downstream					
		Production		Drilling	Well Stimulation		Transportation and Pipelines				Processing						
		Crude petroleum and natural gas	Natural gas liquids	Drilling oil and gas wells	Artificial wells	Hydraulic fracturing of wells	Servicing oil and gas wells	Crude petroleum pipelines	Natural gas pipelines	Pipelines not otherwise classified	Natural gas transmission and storage	Natural gas storage and distribution	Gas production and/or distribution	Petroleum refining			
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KEY	
Exact Target	
Target	
Unimportant	
N/A	

KEY	
Exact Target	
Target	
Unimportant	
N/A	

# MARTECH PLANNING & CONFIGURATION

# Approach

- Conduct Martech workshop
  - Confirm requirements for CRM, MAP and reporting
  - Ensure sales and marketing alignment on standard operating procedures
- Author statement of work
  - Confirm budget and timeline
  - Includes recommendations on technology products, upgrades and plug-ins
- Author technical specification document
- Configuration of MAP, CRM and reporting dashboards
  - Synced with website production to avoid rework

## Workshop Agenda

- Lead and opp definition & qualification processes
- Lead management flow
- Routing rules
- Account & contact data structure
- Field requirements
- User permissions
- Reject & lost reasons
- Sync considerations
- Scoring
- Privacy requirements
- Database segmentation
- Reporting POV and recommendations

# Approach

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## Technical Specification

- Architectural diagram
- Logical flow diagram
- Field definitions
- Picklist values
- Lead routing
- Conversion thresholds
- Lead and opportunity stages
- Sharing and visibility rules
- Mapping between Pardot and Salesforce
- Scoring rules
- Duplicate rules
- Reject / close reasons

# Recommended Tools & Tech

MAP	Pardot, upgrade to Advanced
CRM	Salesforce, additional plug-ins TBD
CMS	WordPress, additional plug-ins TBD
Hosting	Move to managed solution: Pantheon
Chat	Salesforce service cloud
Content Engagement	TBD: Uberflip, Pathfactory
Conversion Analysis	VWO, Hotjar, etc.

# Optional: Sales & Marketing SLA

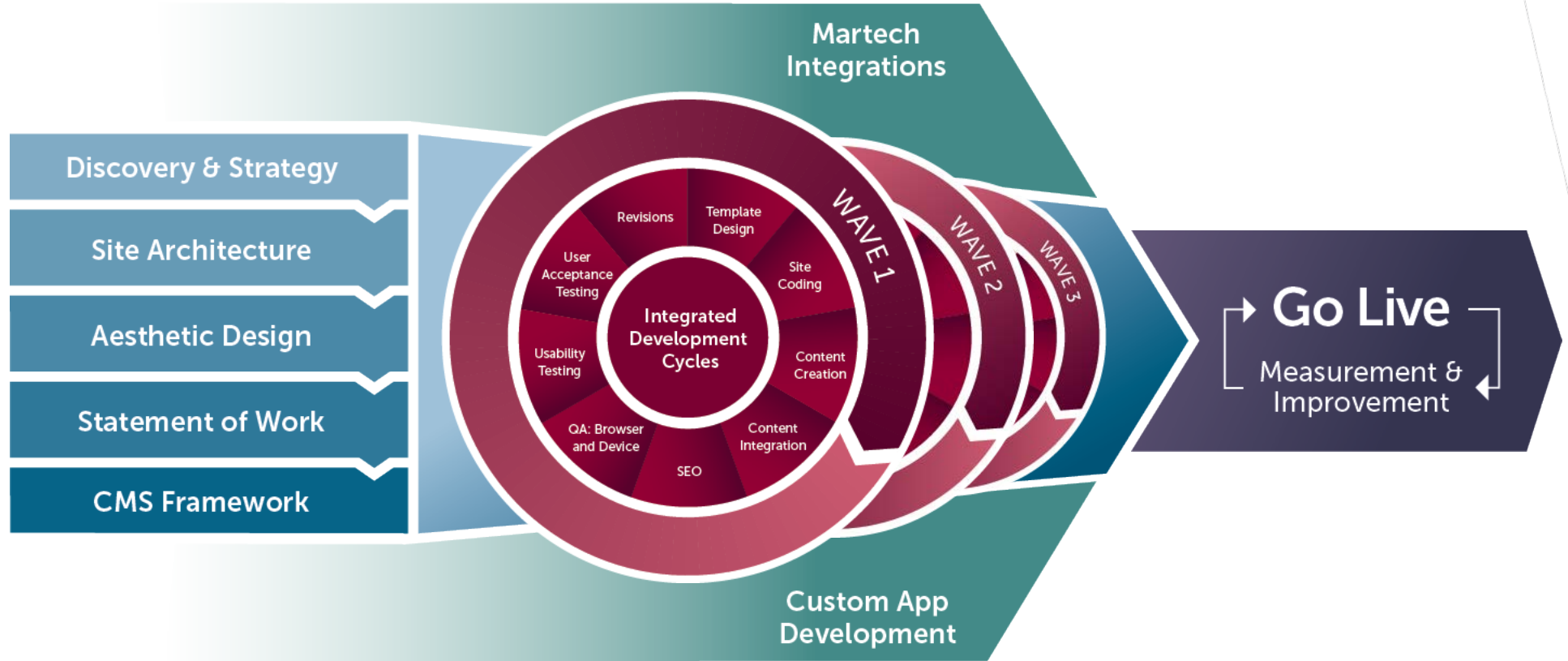
- Formal document defining the lead management SOP marketing and sales have agreed to:
  - Lead definitions
  - Roles and responsibilities
  - Processing rules
  - Follow-up and response times
  - Disqualification rules
  - Critical feedback loops
- Above content largely discussed and confirmed in prior martech workshop



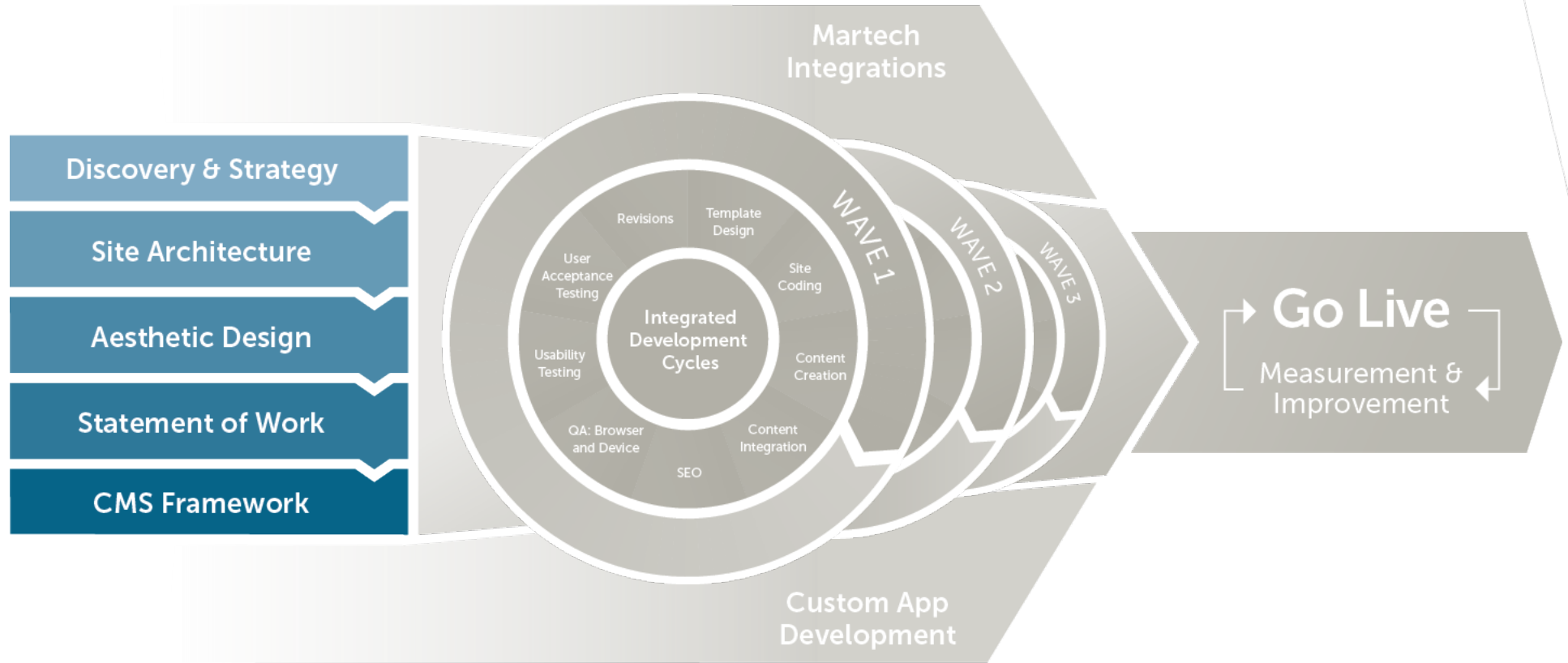
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# WEBSITE PLANNING & PRODUCTION

# Website Project Phases



# Project Phases | 1 - Planning



# Recommended Planning Activities

1

## Audits & Break-out Sessions

SEM & Conversion Audit

Competitive Audit

Translations, Localization and Personalization

Workflow & Tech Requirements

2

## Architecture & Design

Content Mapping

Navigation and Site Theory

Template & Content Planning

Style Tiles

3

## Statement of Work

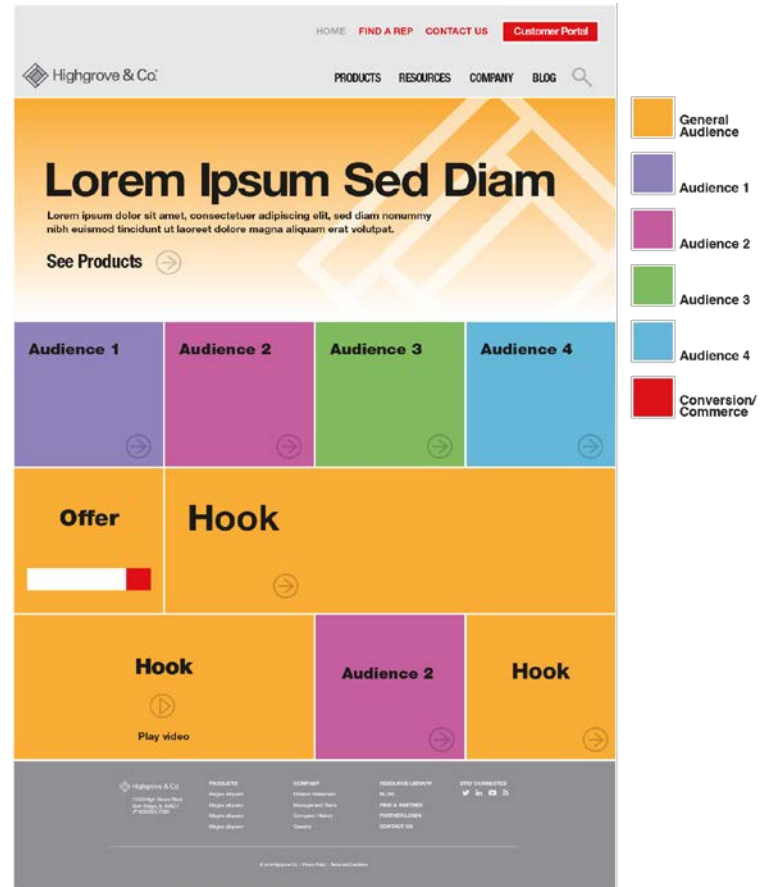
Features List

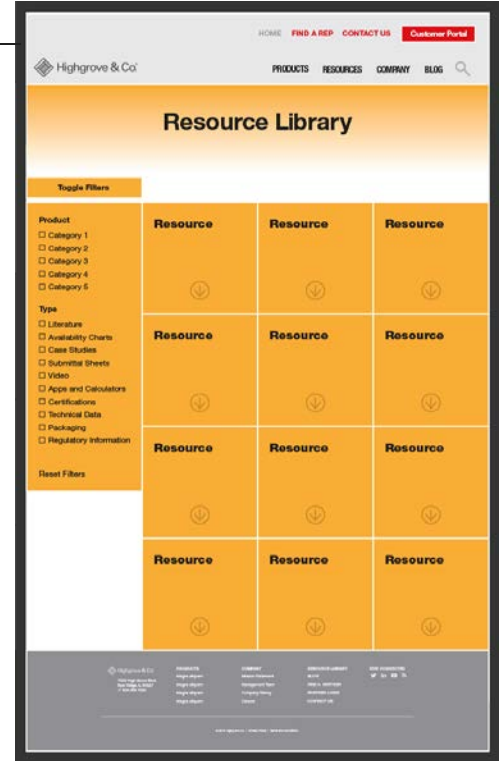
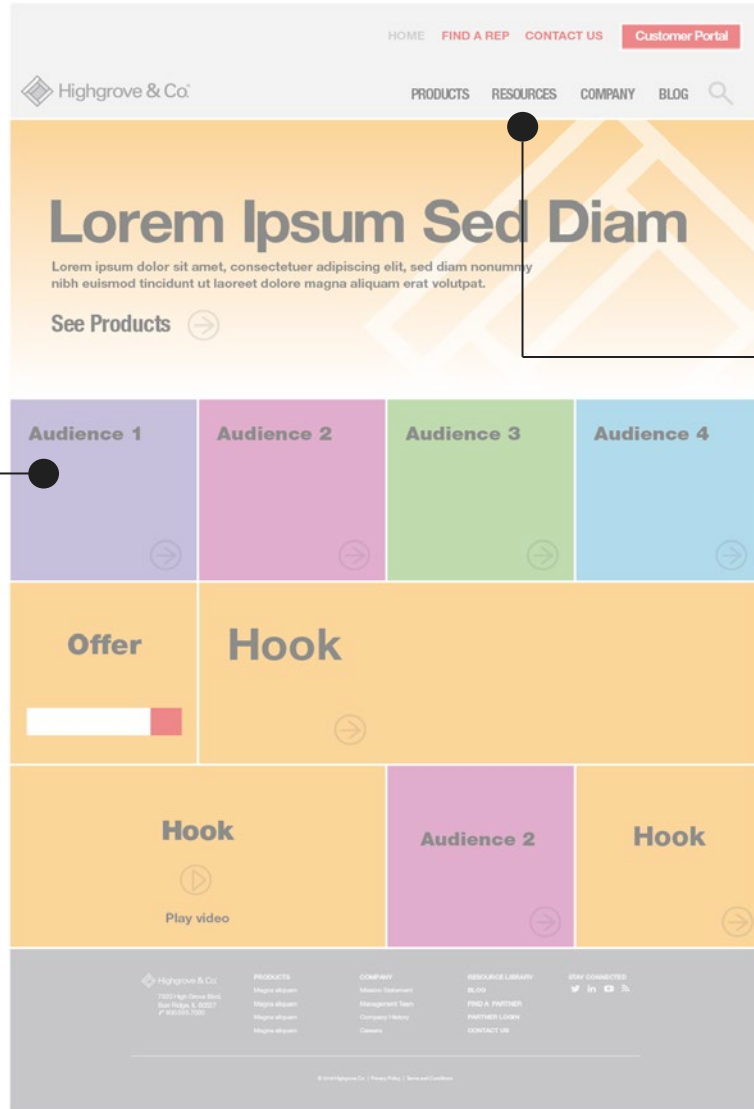
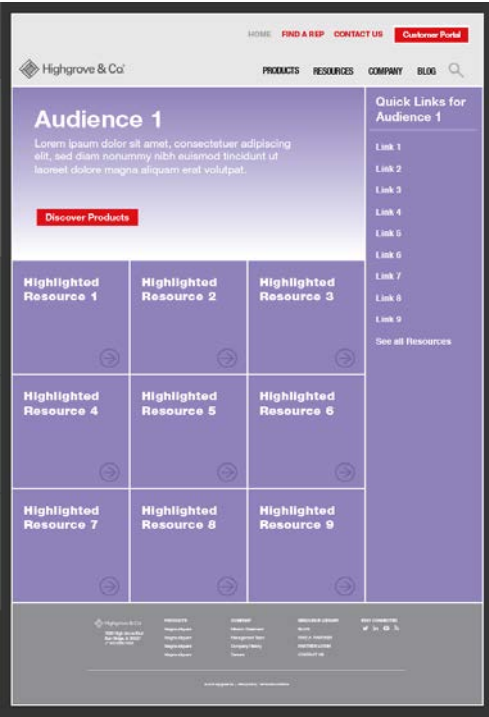
Sprint Cadence

CMS Framework Requirements

Budget & Timing

# Site Theory





FARO

PRODUCTSMARKETSABOUT

FARO WEST

ATLANTIC

CENTRAL

EAST

GLOBAL

Aa

Montserrat Extra Bold

abcdefghijklmnopqrstuvwxyz

Aa

Open Sans Regular

abcdefghijklmnopqrstuvwxyz



# INTEGER POSUERE ERAT A ANTE

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Watch the video

Find out how

Learn more

Learn more

Learn more

Learn more

Check it out →

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Public Safety

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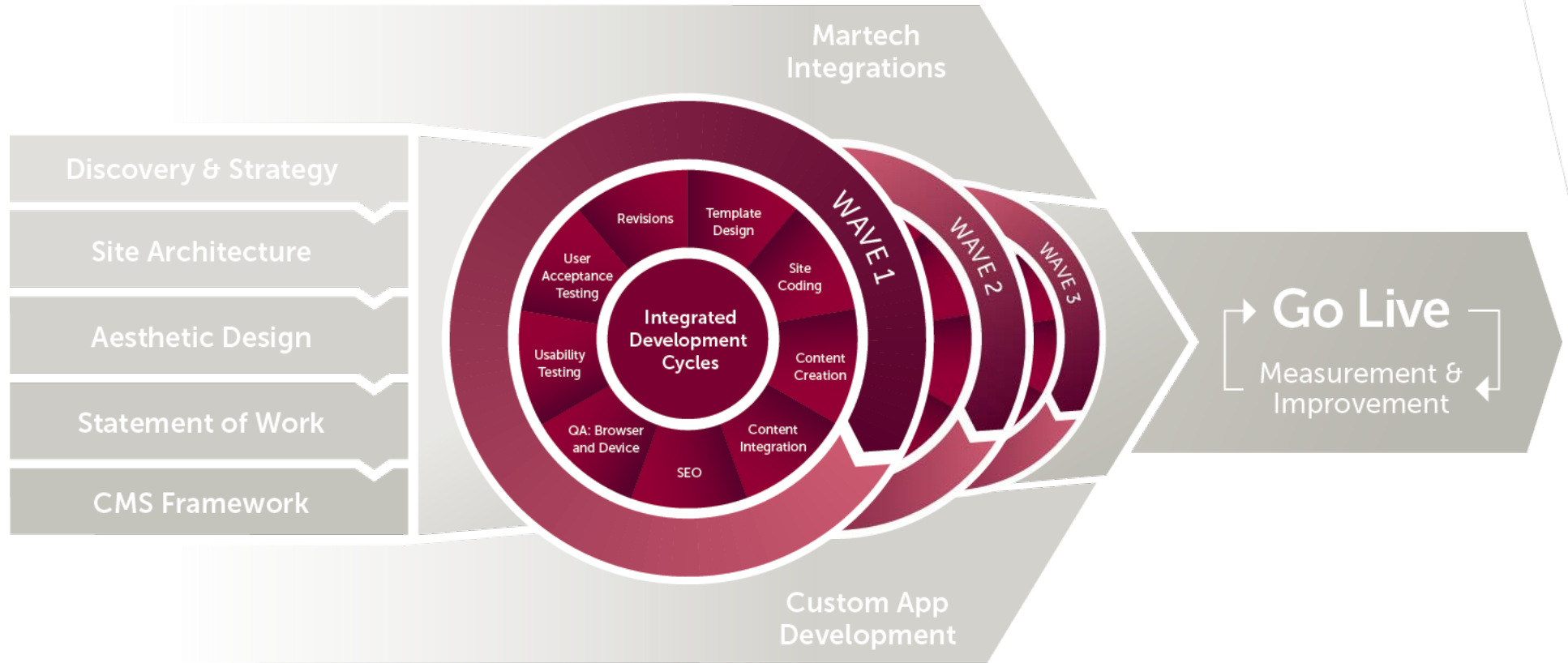
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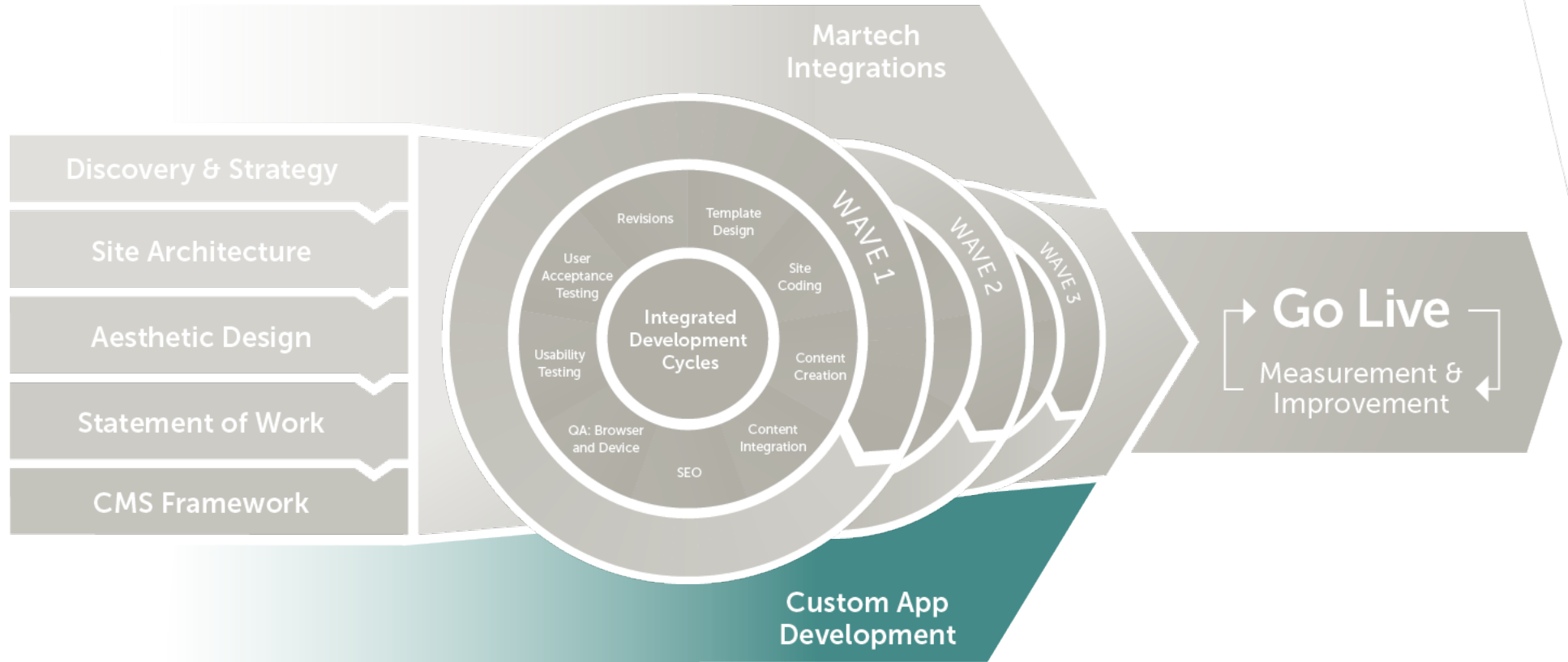


Images are bright and crisp, showcasing natural light sources that draw the eye to the people using and benefiting from our products as well as to the products themselves.

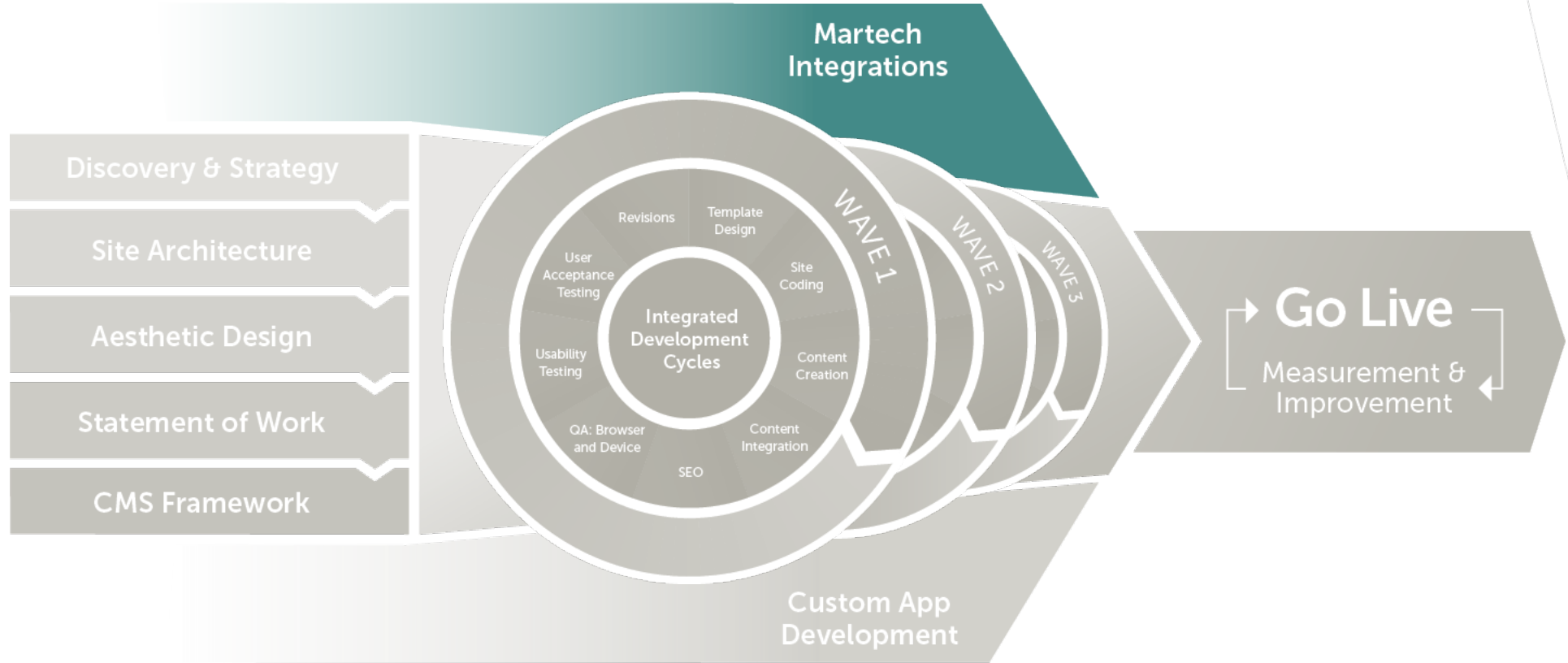
# Project Phases | 2 - Development



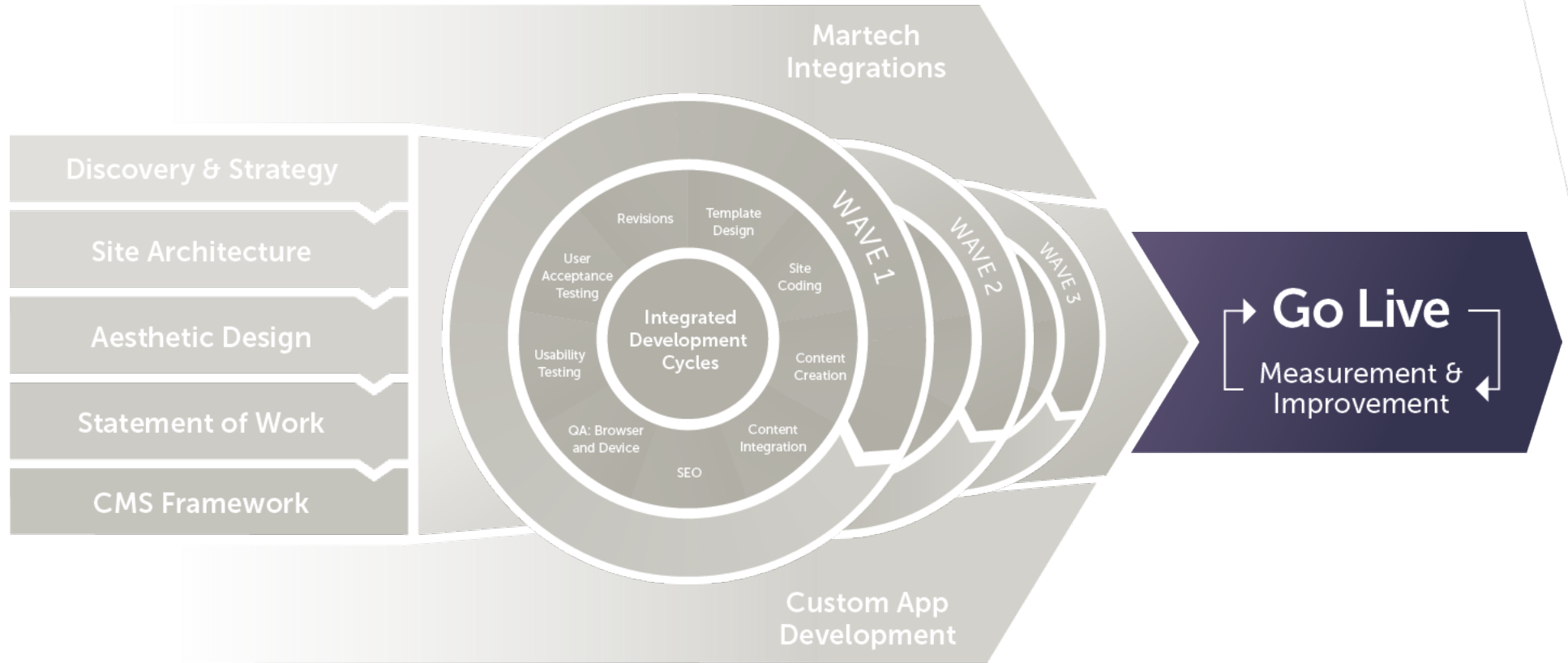
# Project Phases | 2 - Development



# Project Phases | 2 - Development



# Project Phases | 3 – Go Live



# Recommended Development & Go Live Approach

- Two sprint types running in parallel
  - Technical sprints: 5 total
    - Rapid prototyping
    - User story development
    - FED & Dev
    - QA & Design review
    - UAT
  - Content sprints: 5 total
    - Copy & image development
    - SEO
    - Content integration
- Tight collaboration on work included in each sprint, sequencing and timing during SOW authoring
- MVP deployment mid-development allows for in-market product as soon as possible
- Martech config work running in parallel delivers integration efficiencies

# Optional: Stakeholder Homepage Mock-up

- Our typical process marries design, architecture and content in the development phase
- A home page mock-up provides an easy-to-digest visual asset for senior leaders and stakeholders
- Alignment on timing and review cycles to avoid delays and impacts to scope critical

# Optional: Managed Hosting

## Recommendation

PaaS Managed Hosting: Pantheon

## Benefits

- Strong emphasis on webOps
- Tailored for Wordpress
- Significant reduction in effort for development environment set-up, back-ups and patching
- Out-of-the-box solution delivers preventative measures and permissioning
  - Read & write permissions limited to core directories
  - SSH authentication to file directories
- Offers additional features: CDN, support plans, SLAs.
- Can be delivered as a pass-through from Mx or billed directly to you

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# CAMPAIGN STRATEGY & CORE ASSETS

# Equipping You For Demand Gen Success

## Campaign framework

Campaign frameworks provides an approach and POV on how to plan and structure your campaigns to leverage your strategic inputs, demand generation best practices and your martech engine.

## Campaign delivery assets

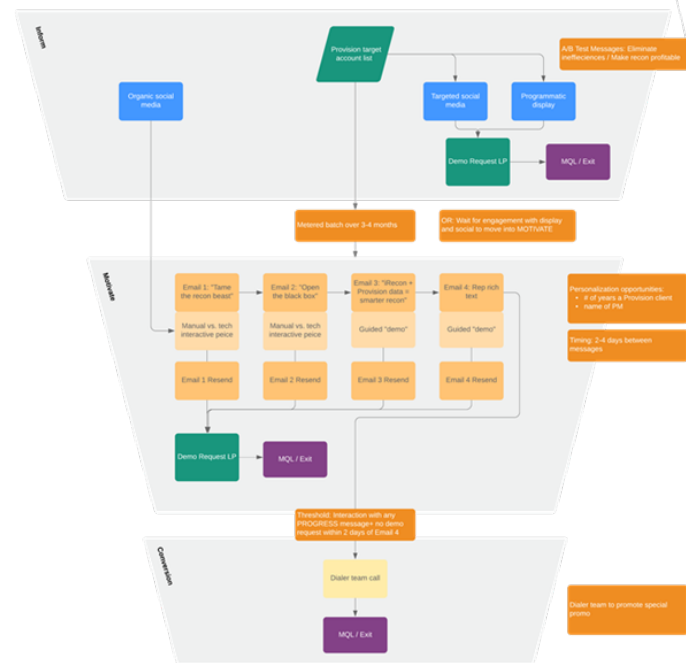
You'll need a landing page template and modular email template that match your new site aesthetic.

## Content asset development

Content that meets your buyers journey needs will be critical as you activate against new personas. We can lighten that load and help you fill the gaps in your content ecosystem.

## Journey strategy, assets and configuration

We'll partner closely with you on the first campaign you run on your new demand gen engine., from the strategy to the asset creation and the set-up in Pardot and confirming & assessing the reporting data.



# The rise of margin compression led Dale Pollak and his team to find a way for dealers to better address it.

They looked harder at the two universal truths and began to question truth #2 ... that as time passes, profit potential diminishes ...

## Consider what the passage of time does to the value of a banana ...

### Green bananas

are not yet ripe but full of potential. Time is on their side.

### Perfectly ripe bananas

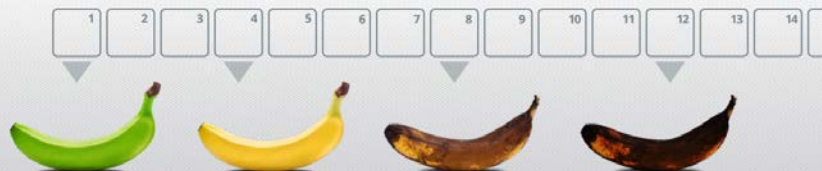
are in their prime and ready to sell. Their time is now.

### Bruised bananas

are blah, and people only buy them if they're heavily discounted. Their time is running out.

### Goosey, rotten bananas

are a lost cause. The only way to move them is to lose them ASAP. Their time has passed.



*Now, if only used cars were as simple as bananas ...*

STEP 4

## YOUR NEW NUMBERS:

NEW TOTAL ANNUAL GROSS:

**\$5,160,000**

CURRENT TOTAL ANNUAL GROSS:

**\$3,870,000**

**33.3%**

INCREASE IN FRONT-END GROSS

**\$107,500**

GAIN IN MONTHLY GROSS

**600**

INCREASE IN ANNUAL UNIT SALES

**\$480,000**

MORE IN ANNUAL F&I GROSS

**50**

MORE UNITS SOLD PER MONTH

**\$7,500**

MORE PER MONTH IN DOC / PROCESSING FEES

## TURN YOUR NEW NUMBERS INTO A REALITY

The vAuto Velocity Method of Management is based on turning your inventory faster to earn a higher profit — and our tools use live-market data to help you do just that.

EXPLORE SOLUTIONS

DISCUSS YOUR RESULTS



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# OPTIMIZATION & SUPPORT

# Upfront Discovery & Strategy Meetings

## CMS Support

- Support internal teams on questions, additional trainings, assistance with complex tasks or minor config updates.
- 30 hours budgeted, use as needed.

## Martech Support

- Support internal teams on questions, additional trainings, assistance with complex tasks or minor config updates.

## WordPress Maintenance

- Ongoing WordPress maintenance
- 2x monthly review for upgrades & patches.

## Monthly Performance Optimization

- Provide monthly analysis and recommendations to optimize site performance and demand generation campaign.
- Facilitate conversion optimization testing and updates.

## Monthly Pipeline Review

- Monthly sessions to ensure ongoing alignment between marketing and sale.
- Identify gaps and conflicts, facilitate feedback loops.

## Hosting Set-up & Fee

- Initial hosting set-up and annual pass-through fee.

## Program Management

- Ongoing strategy and planning to guide program success.

The background features a light blue gradient with a complex network of thin, dark blue lines. These lines form various geometric shapes, including triangles and polygons. Several concentric circles are also visible, some solid and some dashed, creating a sense of depth and structure.

# PROGRAM DETAILS

# Estimate Approach

- Estimate built with as much specificity as possible at this time
- Where possible, estimate reflects a granular review of scope required: hours and resources
- Three areas that are represented with estimate ranges:
  - Martech configuration work
  - Website production work
  - Annual fees for managed hosting
- Ranges provide flexibility to account for unknowns and give room for additional recommendations and feature requests
- Discovery, planning and a detailed SOW will inform each area currently represented with a range prior to any investment in the work

# Program Estimate

Activity	Estimate
Strategic Inputs	\$39,820
Martech Planning & Configuration	\$68,000 - \$80,700
Website Planning	\$89,150
Website Production	\$137,545 - \$160,845
Campaign Strategy & Core Assets	\$122,500
Optimization & Support	\$96,740 - \$98,940
<i>Total program estimate</i>	<i>\$554,545 - \$592,045</i>



# Your Mx Team



**Lisa Everett**  
Group Account Director



**Kelsey Miller**  
Senior Account Manager



**Alexa Landsberger**  
Account Coordinator &  
Project Manager



**Matt Binz**  
Digital Marketing Director



**Dan Edwards**  
Business Analyst III



**Kevin Quinn**  
SEO Analyst



**Thomas Hayward**  
Creative Director



**Tony Briscolino**  
Senior Manager of  
Technology & Integration



**Christina Coviello**  
Marketing Automation  
Specialist



**Nathan Herring**  
Front End Developer II

# Why Partner with Mx

B2B expertise

Demand generation is in our DNA

Deep experience aligning sales & marketing

Tech-agnostic

20,000 ft perspective with executional know-how

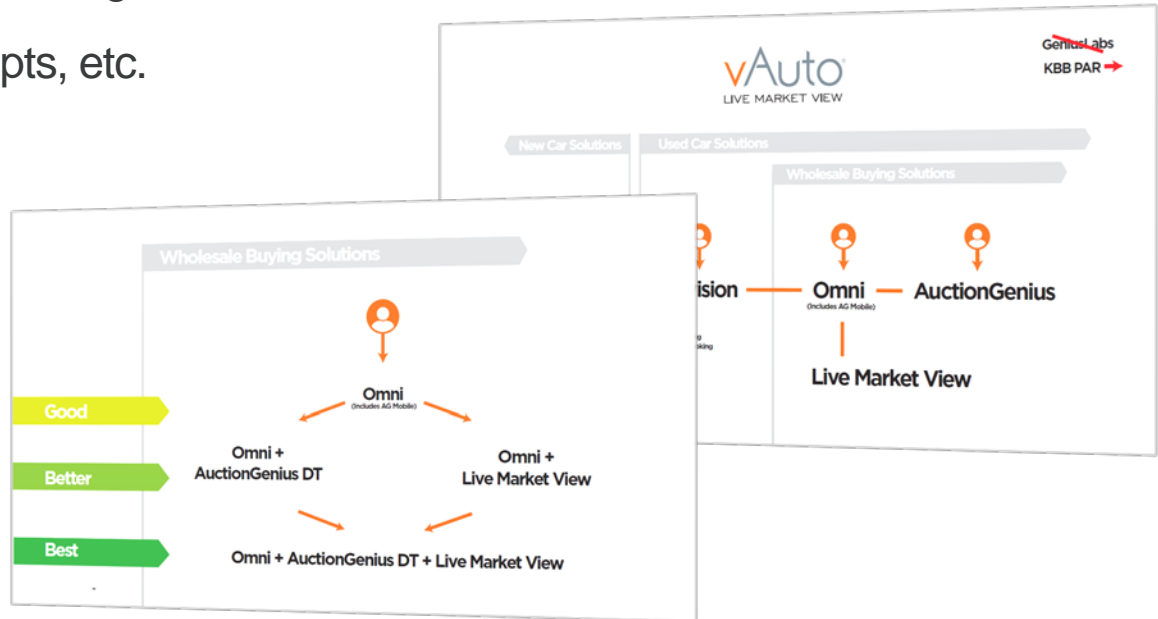
Day-to-day team of marketing strategists

Always part of your team

Invested in constant innovation

# Continued Innovation Program

- Mx will allocated the equivalent of 3% of program budget to innovation planning
- Used to conduct innovation workshops and develop ideas to solve the business challenges you are facing
- Output may include prototypes, concepts, etc.



The background features a complex geometric pattern of thin, light blue lines. These lines form a network of overlapping circles and intersecting straight lines, creating a series of triangles and other polygons. Three small, solid blue dots are positioned at key intersection points: one near the top center, one on the right side, and one on the left side. The overall aesthetic is clean, modern, and technical.

THANK YOU