

# Accelerating Wisetail's Marketing Efforts

*Agency Support Conversation and Options*



# Today

- 1. Introductions**
- 2. About MX**
- 3. Relevant Experiences**
- 4. How We Can Help**
- 5. Next Steps**

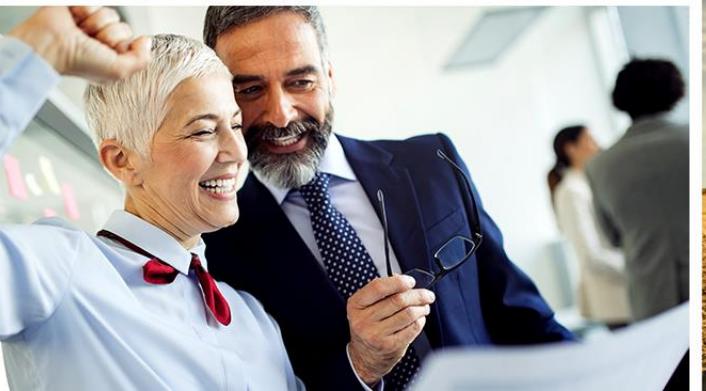
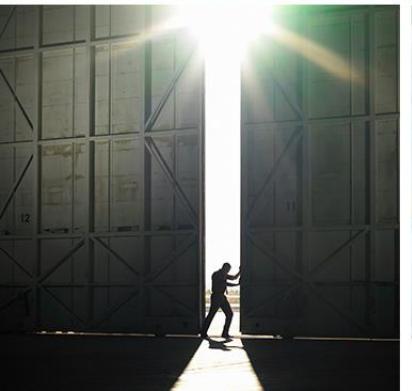
# What We Heard

- Over past 18 months, completed acquisition and focused on product integration, refining market category, brand story
- Expanding beyond LMS and core restaurant market with offering for Operations Professionals, opens door for new markets
- “Audacious goals” for growth in 2025 - expand across audiences, industries and markets
- Small marketing team of generalists
- Need an agency partner to help you accelerate your marketing efforts and amplify impact
- Seeking a partner that can be an extension of your team, flexible, strategic support for content, digital, website, events and more
- Immediate areas of need include design and copywriting, website refresh, event strategy and operations, social media strategy



*Mission*

We impact the marketplace for companies that impact the world.



High Tech  
and SaaS



Packaging and  
Consumer Goods



Financial  
Services



Industrial and  
Manufacturing



Trade  
Associations



The Association of  
Accountants and  
Financial Professionals  
in Business

Additional



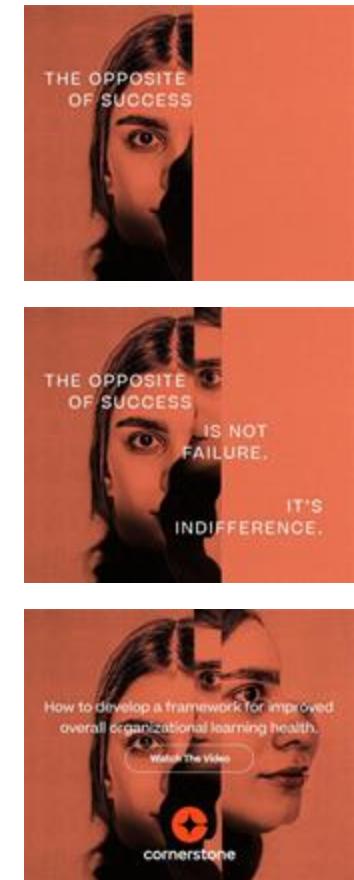
# Awareness



OOH



Social posts



Frame 1

Frame 2

Frame 3

Display ads

# Education



Social posts

Gmail

See how an LXP + content turbocharges an LMS

Cornerstone Inc. cornerstone@cornerstone.com

Having trouble reading this email? [Read the online version.](#)

1+1+1 can equal so much more than 3.

Elevate engagement, productivity, morale and workplace satisfaction with The Power of 3.

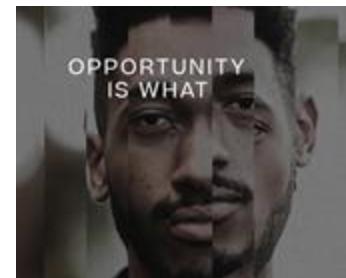
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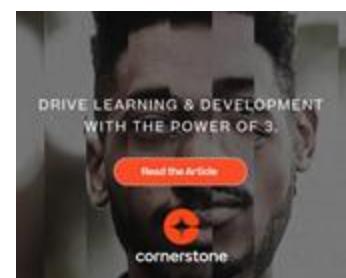
Email journey



Frame 1



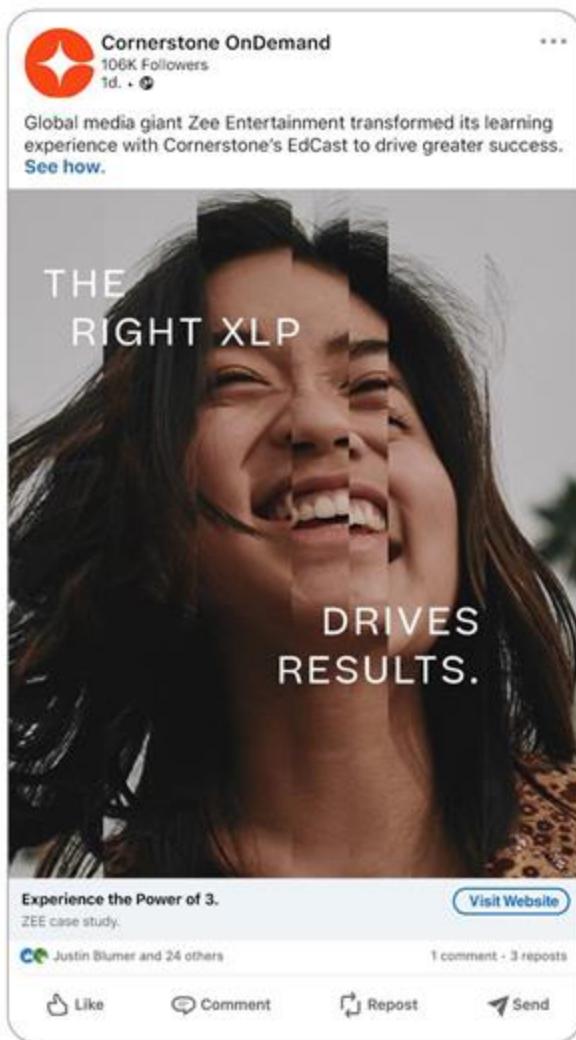
Frame 2



Frame 3

Display ads

# Evaluation



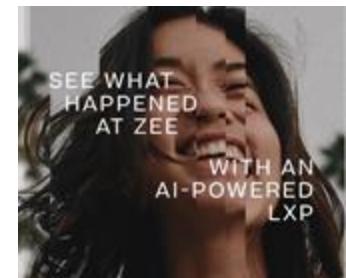
Social posts

A sequence of three screenshots showing an email inbox and an open email message. The inbox shows an email from 'Cornerstone Inc.' with the subject 'Learning Experience Platform transforms...'. The open email displays the headline 'The right XLP drives results.', a sub-headline 'Zee Entertainment Enterprises, ZEE, transforms its learning experience with EdCast.', and a 'ZEE Case Study' button. The footer contains unsubscribe information and reply/forward buttons.

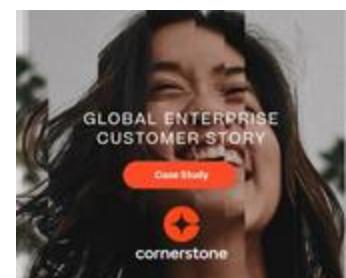
Email journey



Frame 1



Frame 2



Frame 3

Display ads

# LA LA LANDING A NEW ROLE

IDENTIFYING NEW CAREER PATHS IS  
MUSIC TO YOUR EMPLOYEE'S EARS.



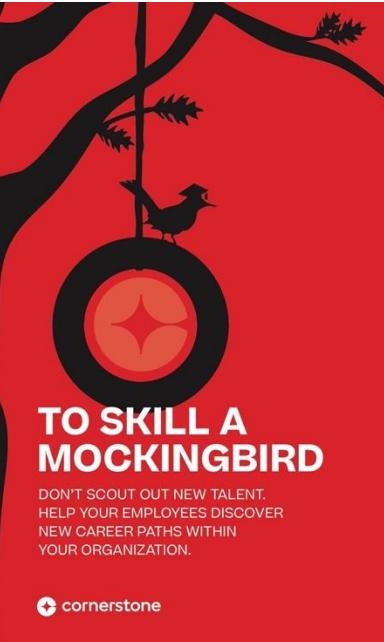
cornerstone

# STAFF WARS THE WORK FORCE AWAKENS

WE MUST UPSKILL OUR EMPLOYEES!  
IT'S OUR ONLY HOPE!



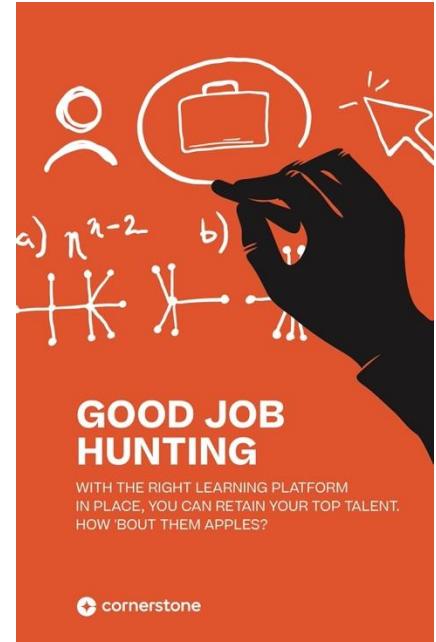
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## TO SKILL A MOCKINGBIRD

DON'T SCOUT OUT NEW TALENT.  
HELP YOUR EMPLOYEES DISCOVER  
NEW CAREER PATHS WITHIN  
YOUR ORGANIZATION.

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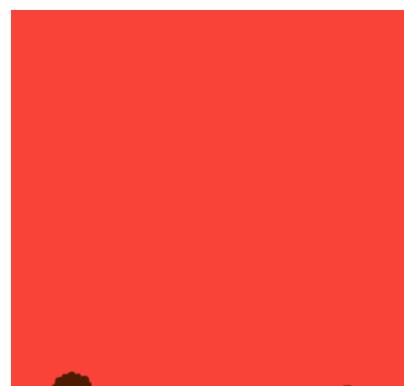
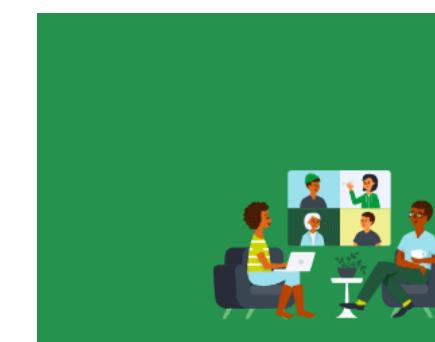


## GOOD JOB HUNTING

WITH THE RIGHT LEARNING PLATFORM  
IN PLACE, YOU CAN RETAIN YOUR TOP TALENT.  
HOW 'BOUT THEM APPLES?

cornerstone





**AGE WAS KILLING MY PROFITS**

When I realized how much money I lost on my inventory, it was a real punch in the gut. My new inventory management strategy is so much smoother, and over time, it was a hard realization, but now sales and profits are better than ever — and that's what matters in the end.

vAuto  
LIVE MARKET VIEW

FIND OUT WHAT AGED INVENTORY IS COSTING YOU.

Request a personalized demo of our used car inventory management software.  
vAuto.com/age | 888-362-5783

\$88,362.5783

PER MONTH

maintaining cars that aren't earning

REQUEST A DEMO NOW

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I'M NEW CAR    I'M USED CAR    I'M WHOLESALE

SOLVING CHALLENGES

WHAT ARE YOUR BIGGEST INVENTORY CHALLENGES?

FRANCHISE DEALERS    INDEPENDENT DEALERS

A LIVE MARKET VIEW FOR EVERY KIND OF CAR DEALER

HOW OUR SOFTWARE SOLUTIONS CAN HELP SOLVE YOUR INVENTORY

WHOLESALE INVENTORY MANAGEMENT & PRICING SOFTWARE

ckwave: Used car auction software

“THREE KEYS TO OPTIMIZING NEW CAR INVENTORY”

Fill out the form below to download the ebook.

DEALERSHIP NAME:

DEALERSHIP ZIP:

FIRST NAME:

LAST NAME:

EMAIL ADDRESS:

PHONE NUMBER:

ACCESS CONTENT

YOUR TURN: 2

FOR DEALERSHIPS USING EXISTING BUYING STRATEGIES

\$166,000

LET US HELP YOU TAKE BACK WHAT YOU'VE LOST

Talk to us about how a customer-based stocking strategy can change your numbers.

BOOK YOUR REVENGE

SEE THE POWER OF PROVISION

Take a tour of Provision

Find out how Provision® helps cars at the perfect price.

Before you explore Provision® and its Live Market View in person, find out what it can do for your dealership.

DEALERSHIP NAME:

DEALERSHIP ZIP:

FIRST NAME:

LAST NAME:

EMAIL ADDRESS:

PHONE NUMBER:

SUBMIT

7 Reasons to Switch to Provision

7 REASONS TO SWITCH TO PROVISION

WATCH THE VIDEO

Fill out the form below to download the ebook.

DEALERSHIP NAME:

DEALERSHIP ZIP:

FIRST NAME:

LAST NAME:

EMAIL ADDRESS:

PHONE NUMBER:

SUBMIT

7 Reasons to Switch to Provision

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FIRST NAME:

LAST NAME:

EMAIL ADDRESS:

PHONE NUMBER:

SUBMIT

7 Reasons to Switch to Provision

WATCH THE VIDEO

Do you know the age of your used car inventory?

Watch the video to learn the effects of age on your used car inventory — and see how Provision can help.

YOUR TURN: 6

AVERAGE TURNOVER: 12

LOST MONTHLY PROFIT: \$75,000

LAUNCH THE CALCULATOR

WATCH THE VIDEO

WATCH THE VIDEO

If you can read a report card, you can stock an ideal inventory.

With Provision and the unique grading system, you'll easily acquire high-end, customer-pleasing vehicles.

CLICK FOR A TOUR

WATCH THE VIDEO

WATCH THE VIDEO

Picking used cars that will quickly move into buyer hands shouldn't be left to chance. Instead, you need to know exactly what to look for, where to find them, and what to bid. That's where Provision comes in.

As our experts will tell you, Provision designs dealer grades to match specific needs, suggesting exactly which cars to stock, where to find them, and what to bid. That's how your inventory looks better than ever and is more profitable.

- Aligns real-time marketplace data to make specific recommendations
- Shows you what inventory to purchase, when to get it and at what price
- Helps you price inventory to 10-15 times per year on average
- Makes short work of appraisals, software, marketing and more

CLICK FOR A TOUR

REQUEST A CONSULTATION DEMO OR CALL 877-828-8614 TODAY

WATCH THE VIDEO

# How We Can Help

# Relationship Models

## Retainer-based:

- Consistent team of people working across a piece of business, dedicated to the account
- Can shift team's focus based on business, marketing or project needs
- Able to provide proactive thinking, training, best practice sharing, etc
- Ease of budgeting

## Project-based:

- Projects and programs scoped as they arise
- Flex in spend through the year
- Shorter-term commitment – though this breeds a different mindset for all involved
- Only paying for the resources you need
- Requires more time for all parties to scope and manage

## Hybrid Model:

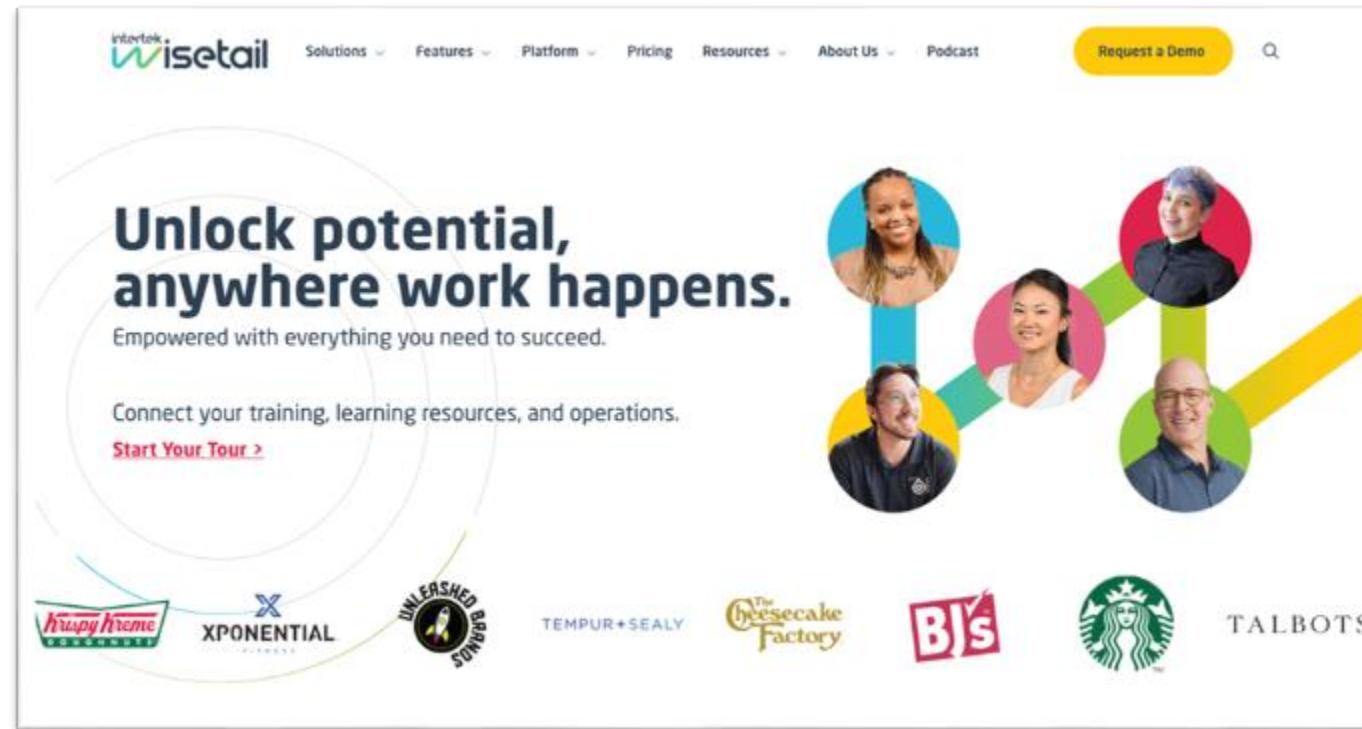
- Smaller, consistent team working across a piece of business, dedicated to the account
- Extended team, specialists scoped as needed
- Can shift core teams' focus based on business, marketing or project need
- Able to provide proactive thinking
- Flexibility in spend through the year

- Direct access to senior level, experienced team**
- Flexible in focus and consistently engaged in your business**
- Augments your team**
- Larger projects scoped outside of retainer**
- Discounted rates for 6-month and 12-month commitment**

Small	Medium	Large
<ul style="list-style-type: none"> <li>Design focused</li> <li>Light copywriting support</li> </ul>	<ul style="list-style-type: none"> <li>Equal amounts copywriting and design</li> <li>Includes Print Production Management for Trade Show and other needs</li> </ul>	<ul style="list-style-type: none"> <li>Includes retained Creative Director for creative strategy and larger projects</li> </ul>
Roles (FTE)	Roles (FTE)	Roles (FTE)
<ul style="list-style-type: none"> <li>Account Supervisor (10%)</li> <li>Sr. Copywriter (30%)</li> <li>Sr. Art Director (50%)</li> </ul>	<ul style="list-style-type: none"> <li>Account Supervisor (15%)</li> <li>Sr. Copywriter (50%)</li> <li>Sr. Art Director (50%)</li> <li>Print Production Manager (10%)</li> </ul>	<ul style="list-style-type: none"> <li>Account Supervisor (20%)</li> <li>Creative Director (10%)</li> <li>Sr. Copywriter (50%)</li> <li>Sr. Art Director (50%)</li> <li>Print Production Manager (10%)</li> </ul>
Monthly Retained Fee	Monthly Retained Fee	Monthly Retained Fee
<i>6-month commitment</i> \$25,040	<i>6-month commitment</i> \$34,320	<i>6-month commitment</i> \$39,851
<i>12-month commitment</i> \$23,649	<i>12-month commitment</i> \$32,413	<i>12-month commitment</i> \$37,637

# Scoping Considerations

- Brand refresh/Brand voice updates
- Updated user journeys to support broader targets
- Expansion of site structure
- CMS (Wordpress) needs
- Content development/SEO
- Conversion rate optimization
- Integrations with tech stack (Pardot, SF, etc.)
- Authoring/admin needs



# SAMPLE Investment Summary

## Project

ACTIVITIES/DELIVERABLES	BUDGET
<ul style="list-style-type: none"> <li>Agency immersion, needs assessment, research, environmental analysis, user stories</li> <li>Experience Brief</li> </ul>	\$30,000
<ul style="list-style-type: none"> <li>Site theory (IA, Content strategy), Creative Platform (Concept, Wireframes, Interactivity, Design System), Infrastructure and Integration Plans (CMS, Martech, Data)</li> <li>Experience Plan</li> </ul>	\$50,000
<ul style="list-style-type: none"> <li>Content Development</li> <li>Tech Development</li> <li>MAP/Data/Integrations</li> <li>Training</li> </ul>	\$105,000
<ul style="list-style-type: none"> <li>Migration, testing, launch</li> </ul>	\$5,000
Total	\$190,000

- Outsource Manufacturer of Pharma
- Website Goals: Better reflection of their brand, Improved UX, Brand Awareness, More scalable/flexible, Better authoring
- Smaller site, technical content provided by client
- % of existing Wordpress site was useable
- Minimal data integrations
- Multi-media/VR for capabilities demonstration

## Post-Launch

MAINTENANCE/OPTIMIZATION	BUDGET/MO
SEO	\$3,500
CRO	\$3,500
WP MAINTENANCE/UPDATES (2/mo)	\$1,500
Total	\$8,500/mo

## Brand Refresh

DIGITAL GUIDELINES	BUDGET
<ul style="list-style-type: none"> <li>Update and refinement of current guidelines for colors, typography, tone, photography and patterns</li> <li>Updated brand guidelines to include digital</li> </ul>	\$19,000
Total	\$19,000

# How We Could Get Started

- Finalize retainer model that we believe would fit best
- Begin immediately after contracting to start providing value
- Rapid onboarding for ways of working, brand, business background
- Monthly reviews to calibrate size of team, process as needed
- Continued conversation on website refresh, other larger initiatives that require more time and different skillsets than the core retained team

B2B Like It Oughta Be.