



Request for Proposal (RFP)

Branding & Marketing Services

Respond to:

Jerry Tice
Managing Director Synovate and Digital Products
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RFP issued by:

Synergetics Installations Worldwide, Inc.
<https://www.Synergeticsww.com>
75 Congress St., Suite 201, Franklin Block Building, Portsmouth, NH -3801

1 Summary

Synergetics is seeking a full-service agency to assist with creating a brand identity and marketing strategy for a new set of products and services we are developing and intending to launch in the coming months.

2 Company Background and Overview

Synergetics is a privately held New England-based Management Consulting firm established in 1975. With office locations in the US and UK, Synergetics operates internationally and employs over 150 professional analysts, consultants, project managers, and subject matter experts. As one of the largest “Implementation Consulting” organizations, Synergetics has completed over 1,600 business process engagements across nine distinct verticals to build more than \$8 billion in bottom line profitability and improve overall operating efficiencies.

Synergetics works with a diverse client portfolio of leading industrial and service corporations across Private Equity, Small and Medium Enterprises, and Fortune 500 Companies. With customized services and solutions, Synergetics performs hands-on detailed management, financial, and operational assessments to develop and deliver specific cost savings and revenue enhancement initiatives.

Our mission is to create business value for our clients. Value is what all businesses strive for. How that value is created and enhanced is what makes good companies great. In its simplest form, value is about profits, but it can also be measured by employee engagement, the customer experience or the price placed on a company, and its products and services.

Our company has traditionally been grouped into four business units: Business Services, Healthcare, Consumer Goods, and Industrials. Business Services serve the Financial Services, Software, Technology, and Telecommunications sectors. Healthcare, as the name suggests, services the Healthcare sector. The Consumer Goods and Industrials business units focus on the Supply Chain, Manufacturing, and Distribution aspects of their respective sectors.

Traditionally, our service offerings have been traditional management consulting projects where we are presented with a situation and help develop solutions to resolve the issues and grow business value.

We recently created a fifth business unit (BU) called Synovate & Digital Products. This is the focus of this RFP. The mission of this new division is twofold:

1. Support the other four business units by creating digital solutions in the form of Digital Control Towers, Dashboards, Analysis Tools, and other digital products that can be sold to our clients and create ongoing revenue streams after our consulting projects are complete.
2. Develop Standalone products that can be sold to our clients separately from our consulting environment, which may lead to additional consulting revenue through product implementation and training.

In essence, this creates two marketing channels – 1. As an extension of and integral to our consulting services, and 2. Direct to our client base through more traditional means.

We have tentatively named this collection of products “Synovate.” Currently, we have four products that we have either developed and sold or are developing. These are:

1. **Synovate Line Beat:** A solution that collects production data directly from manufacturing lines/areas and provides dashboards to monitor production KPIs, downtime, quality events, etcetera.

2. **Synovate Maintenance Manager:** A lightweight CMMS (Computerized Maintenance Management System) currently configured as a Microsoft Power App. We plan to convert this from a Power App to a custom app.
3. **Synovate MRO Parts Manager:** A lightweight inventory management app built as a bolt on to Maintenance Manager and developed as a Power App
4. Custom dashboards/control towers for Supply chain operations within SAP, Power BI, Tableau, etc.

All modules are then tied into our custom “Central Intelligence” Dashboards to provide management with a comprehensive view of their operation, as illustrated in Figure 1 below.

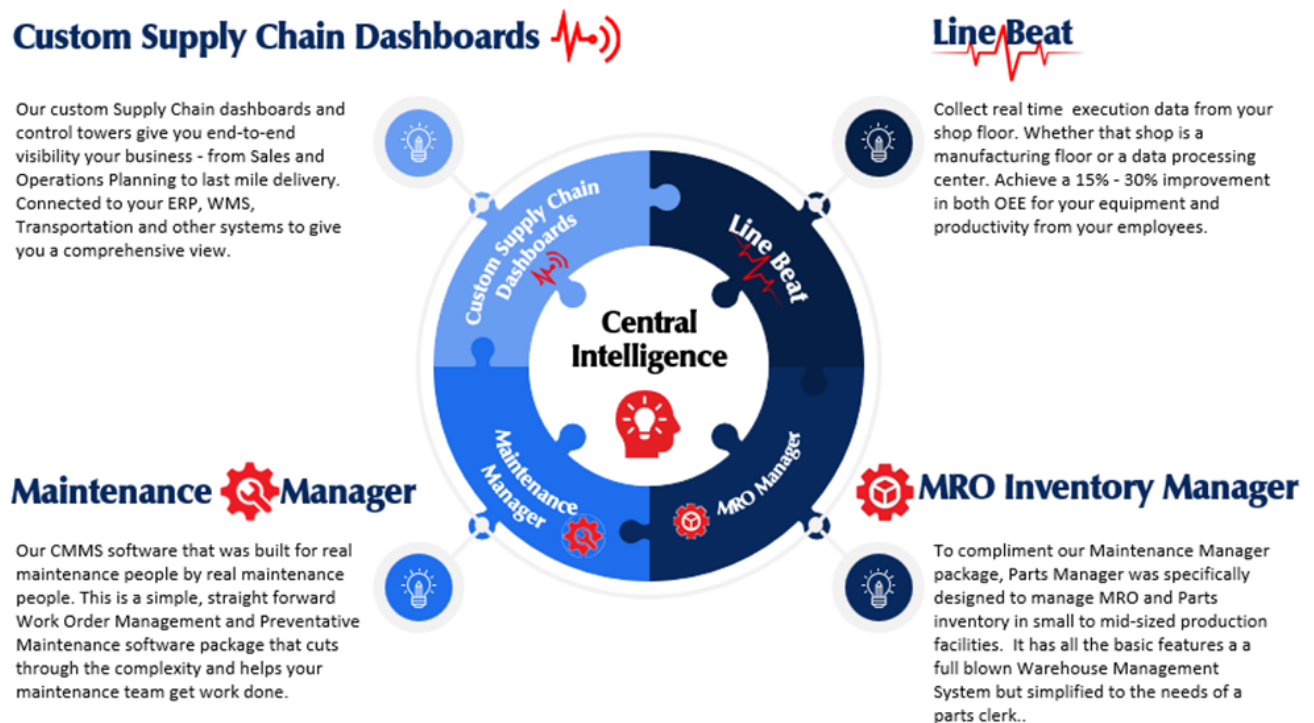


Figure 1. Current Synovate Products

Future products and modules are also being considered, as shown in Figure 2 below, and include products such as:

1. **Supply View:** Procurement Control Tower
2. **Sales Beat:** Sales and revenue management dashboard
3. **Machine Pulse:** An equipment condition monitoring system
4. **Staff View:** A staffing guide based on sales and resource requirements
5. **Logistics View:** A control tower to manage incoming and outgoing shipments from a facility or group of facilities.

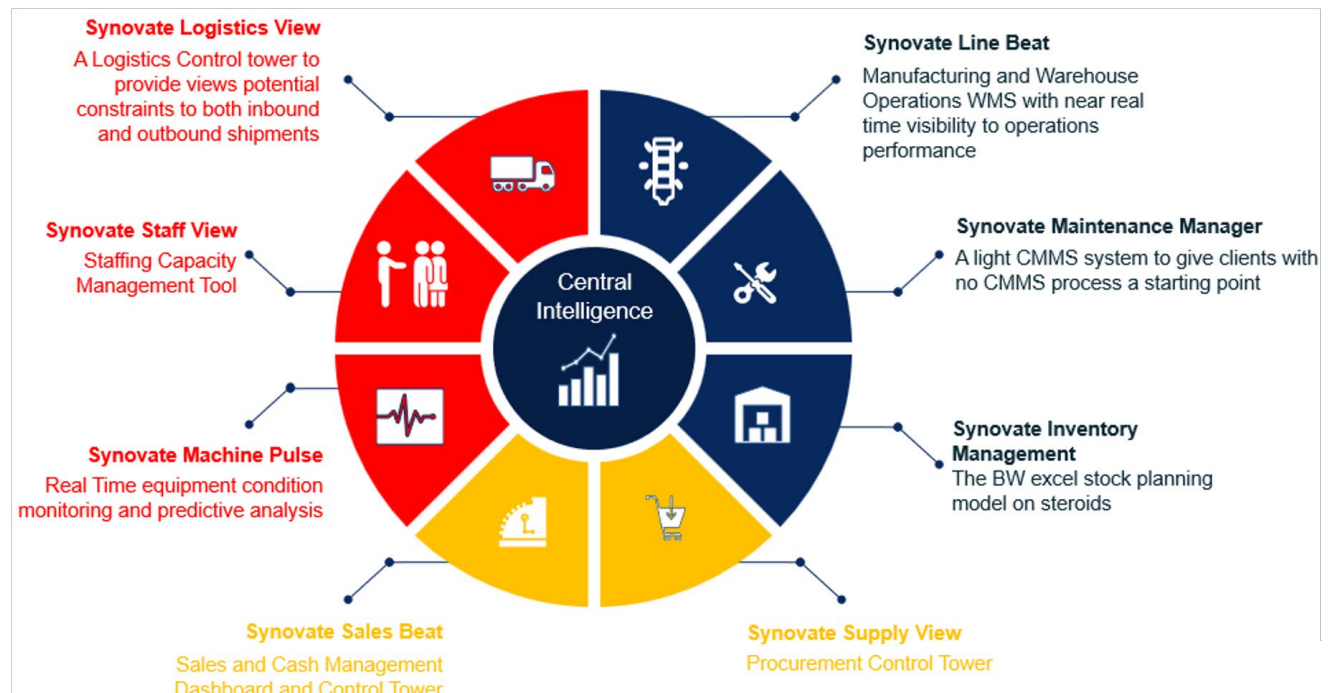


Figure 1. Current and Potential Future Synovate Products

Our initial target market for these products is small, \$10mm to \$100mm manufacturing and service firms. About 70% of our consulting projects come through a group of Private Equity firms that regularly engage us to help them add value to the companies they purchase. Most of these PE firms are targeting acquisitions in this size range. As such, it makes sense for Synergetics to first target these known clients for sales of our products within their existing portfolio of companies. However, we will soon exhaust this group and must target a larger audience.

We have an advantage over our competitors because we are manufacturing experts first and software providers second. By this, we mean that we have spent years developing a methodology for training clients to use live production data effectively and developing a culture of continuous improvement. Our competitors, conversely, are selling a product for which they provide minimal training on how to use the data. To illustrate, we often run into previous competitor implementations when we are brought in to do improvement projects. An estimated 70% of these competitor implementations are considered by the client to be either flawed or failed. Typically, we find that the production standards used to calculate KPIs are wrong, the disciplines to accurately input the required data are not in place, the behaviors required to utilize the data and obtain the benefits are lacking, etcetera. These are not necessarily due to a bad product but the lack of training and an understanding of our competitors of the criticality of these for a successful and sustainable implementation.

With this in mind, we are highly interested in developing our marketing strategies and content around our nearly 50 years of experience providing performance improvement services.

3 RFP Overview

3.1 Scope

As part of this RFP, we are looking for an agency that can assist Synergetics with:

1. Brand Strategy Development:
 - Brand Identity: Define the brand's personality, values, mission, and vision.
 - Unique Value Proposition (UVP): Identify and articulate what sets our suite of products apart from competitors.
 - Brand Positioning: Determine how the suite of products will be perceived relative to competitors.
2. Visual Guidelines:
 - Name & Logo: Design a distinctive name and logo that embodies the brand's identity and values while reflecting our product's purpose and appeal.
 - Color Palette: Choose colors that resonate with the brand's personality and appeal to the target audience.
 - Typography: Select fonts that align with the brand's voice and are legible across different mediums.
3. Promote & Launch:
 - Marketing Campaigns: Create a Business-to-Business marketing strategy/campaign for our suite of products, enabling us to generate buzz and attract business.
 - Website Content: Create content for a user-friendly and visually appealing website that reflects the brand's identity and provides information about the product. Our internal team will create the website.
 - Print Materials: Design brochures, flyers, and other printed materials that convey the brand's message and appeal to the target audience.
 - Digital/Presentation Assets: Develop digital assets such as professional presentations for pitches, demo videos, banners, social media graphics, and informative materials that sales teams can use to communicate your product's value.
4. PR Campaign:
 - Creating a PR campaign to establish our presence in the marketplace
5. Pricing Strategy
 - Seeking expert guidance to establish the optimal pricing strategy for our suite of products. We want to determine a pricing model that balances market competitiveness, customer value perception, and revenue objectives.

3.2 What Should Your Response Contain

The response to this RFP should contain details related to the below sections. Please ensure that your responses are provided in PDF format. Any additional materials you want to include should be provided in an appendix.

1. Organization Overview and Value Proposition:
 - Overview: An overview of your organization indicating the date of establishment, revenue for the past two years, relevant certifications or accreditations and any other details that will differentiate you from your competitors
 - Value Proposition: Highlight why your organization is the best fit for the project, emphasizing your unique strengths and advantages.
2. Execution Approach
 - Approach: Provide your detailed approach to address the scope of the RFP, highlighting goals and key tactics.
3. Implementation Plan
 - Timeline: Provide a detailed project timeline with key milestones and deadlines.
 - Tasks and Deliverables: Outline specific tasks and deliverables, including branding elements, marketing campaigns, and promotional materials.
 - Resource Allocation: Explain how resources will be allocated, including team members and their roles.
4. Budget and Pricing
 - Cost Breakdown: Present a detailed budget that includes costs for each of the five items listed in Section 3.1 -Scope details on all additional expenses.
 - Value Justification: Justify the costs by explaining the value and benefits provided by your proposed solutions.
5. Team and Expertise
 - Team Members: Introduce the team members working on the project, including their roles, qualifications, and relevant experience.
 - Expertise: Highlight any specialized skills or expertise contributing to the project's success.
6. Measurement and Evaluation
 - KPIs and Metrics: Define the key performance indicators (KPIs) and metrics you will use to measure the success of the branding and marketing efforts.
 - Reporting: Describe how you will report on progress, including the frequency of updates and the format of reports.
7. Case Studies and References
 - Relevant Examples: Provide at least two case studies or examples of similar projects you have completed, demonstrating your capability and success.
 - Client References: Please include at least two references from past clients that validate your expertise and performance. Reference calls will be conducted for shortlisted candidates only.
8. Risk Management
 - Risk Assessment: Identify typical risks or challenges you have encountered on similar initiatives and explain how you plan to address them.

- Contingency Plans: Outline any contingency plans you have in place to manage unforeseen issues.

9. Additional Information

- Innovative Ideas: Present any additional innovative ideas or suggestions that could enhance the project.
- Supporting Documents: Include any supporting documents in the Appendix that will differentiate you from your competitors.

Should your company feel that a portion of the scope of work is not within your capabilities, please let us know during the initial “expressing interest” phase that you would like to pursue only part of the work and which part that is.

4 RFP Process

4.1 Timeline of Key Activities

Please acknowledge the receipt (via confirmation email) of the RFP and the intent to submit a proposal.

To provide each supplier with equal information, we will answer only those questions regarding the RFP submitted in written form. If your Firm should have any questions, please submit them in writing per the date in the table below. To ensure fairness, we will email all substantive questions and answers to every supplier participating in the RFP.

Event	Date (2023)
RFP distributed	2 nd August
Deadline for submitting questions	7 th August (11 am EST)
Consolidated responses to questions	13 th August
RFP responses due to Synergetics	16 th August (11 am EST)
Agency shortlist for presentations	23 rd August
Agency presentations	4 th & 5 th September
Agency selection & notification	13 th September

All Agencies receiving this RFP must follow the deadlines above. Failure to do so may lead to the disqualification of the RFP.

4.2 Questions and Clarification

All questions must be submitted in writing to Jerry Tice (ticej@synergeticsww.com) during the RFP response period by August 13, 2024 (11:00 a.m. EST).

Ensure that the number of questions is limited to a maximum of ten individual questions. Responses to these questions will be provided in writing to all responders. No other correspondences will be entertained.

4.3 Response Submission

Responses to the RFP must be submitted via e-mail by 11:00 AM EST on August 16, 2024. Your response to this document should be sent via e-mail to Jerry Tice (ticej@synergeticsww.com).

Should you decide not to respond to this RFP, Synergetics would appreciate notification by e-mail.

4.4 Anticipated Payment Structure

The payment structure of the contract awarded pursuant will be based on the satisfactory completion of associated deliverables agreed between Synergetics and the selected agency. The final pay structure will be detailed in the resulting contract and based on a set of agreed milestones and mutually defined and documented acceptance criteria. In addition, Synergetics may apply liquidated damages based on the quality and timeliness of the Agency's performance. Synergetics will consider proposals to structure payments differently and reserves the right to select any payment structure that is in the organization's best interest.

5 Response Qualifier

The RFP is not an offer to contract, nor should it be construed as such. It is an invitation to recipients to submit a proposal addressing the response to the above. Synergetics reserves the right to make no selection, enter into no agreement as a result of this RFP, and withdraw or modify this RFP. Only the execution of a written agreement between Synergetics and the preferred provider(s) will obligate Synergetics to proceed.

It should be understood that the response to this RFP constitutes a willingness to do business on the terms stated in your Firm's response. Should a contract be awarded to you, Synergetics may, at its option, incorporate all or any part of the response to this RFP in the contract or on terms to be agreed. The response to this RFP must remain valid for one hundred and eighty (180) days after submission.

We reserve the right to communicate with the entities submitting responses to this RFP, individually or collectively, formally or informally. We reserve the right to request additional information from any entity submitting a response to this RFP. We reserve the right to extend the time within which one or more entities submitting responses to this RFP may submit responses or additional requested information.

We shall have no obligation to reveal or explain the reason(s) for awarding or not awarding the business to any entity. All costs associated with evaluating, preparing, and submitting any bid under this RFP shall be borne by you.