

Technical Proposal

# Communications and Marketing Consultants

The Office of the State Treasury

Request for Proposal RFP#-3120003221

Marketing Excellence  
for OST's Public  
Programs

14 October 2025

## TABLE OF CONTENTS

<b>Table Of Contents</b>	<b>2</b>
<b>Executive Summary (Non-Identifying)</b>	<b>3</b>
<b>Approach</b>	<b>4</b>
<b>Approach, Manpower, And Schedule By Service</b>	<b>8</b>
<b>One-Page Schedule (Illustrative Year 1)</b>	<b>9</b>
<b>Matrices: Approach, Manpower, And Schedule</b>	<b>10</b>
<b>Quality Management Practices</b>	<b>14</b>
<b>Plan To Implement Scope Of Services</b>	<b>16</b>
<b>Appendix A</b>	<b>21</b>

## Executive Summary (Non-Identifying)

We confirm we are not the incumbent. In accordance with the blind evaluation requirements, all identifying elements have been removed from this submission, including company and staff names, logos, color palettes, and trademarks. Work examples are presented in generalized form solely to evidence relevant capability.

### **Understanding and approach**

The Offeror will provide communications and marketing consulting services across strategy, creative materials, production support, media, community activation, and measurement for the Office's programs, including college savings and unclaimed property awareness. The plan emphasizes inclusive, plain-language messaging and statewide reach across urban, rural, and small-town audiences via radio/TV, social/digital, web updates, civic and employer outreach, direct mail, public affairs, sports marketing, and event support.

### **How the work will be delivered**

- Strategy: annual plan with quarterly playbooks; message matrix; governance and approvals prior to production.
- Materials: concept-to-final workflow for print, display, and digital assets; accessible design and translation/readability checks; production support as requested by the Agency.
- Measurement: post-cycle/event research as requested; monthly status updates and written/oral reports at the cadence the Agency specifies; quarterly reviews to iterate the plan.

### **Capabilities aligned to evaluation**

- Specialized experience: multi-market programs; audience research; direct-response methods to reach defined demographics.
- Emerging strategies: structured horizon scanning, small pilots with clear thresholds, and rapid knowledge transfer through playbooks/briefings to broaden understanding of target markets.
- Creative and analytics: dedicated creative staff (5+ years on large campaigns) and analytics specialists who translate data into segmentation, creative frames, and channel mix adjustments.

### **Contractual acknowledgments**

The Offeror will invoice in arrears and understands the fixed-price, task-based nature of the agreement; the Agency will own all materials produced for the Agency. The submission sequence and formatting conform to the requirements for three separate electronic proposals (technical blind, cost blind, and management).

### **Result**

A clear, measurable program that meets Mississippians where they are, strengthens awareness and participation in the Agency's programs, and provides the Agency with transparent reporting and continuous improvement under a compliant, blind technical submission.

**Partnership Philosophy & Communication Approach: Our proposal strategy integrates proven behavioral principles that strengthen credibility, trust, and engagement—ensuring OST's programs are communicated with clarity, authority, and connection across Mississippi communities.**

## Approach

**A plan giving as much details as is practical explaining how the services will be performed.**

### **Overview and operating rhythm**

We will deliver strategy, marketing materials design/production, and outcomes evaluation in a continuous loop: Plan → Produce → Distribute → Measure → Improve. We will coordinate closely with OST program leads for College Savings (CSPM), Unclaimed Property, and Executive Office communications.

This plan aligns with Section II: Marketing Strategy (2.1.1), Marketing Materials Design (2.1.2), and Evaluation of Results (2.1.3).

### **Shared Playbooks, Not Just Deliverables**

Beyond campaign execution, we co-develop quarterly playbooks that capture insights, workflows, and messaging strategies. These documents become living resources that OST teams can adapt and expand upon for future programs.

### **Planning and strategy (Months 0–1; refreshed quarterly)**

- Intake and discovery: kickoff with OST to confirm program goals, audiences, KPIs, compliance constraints, and calendar (enrollment windows, events, fairs).
- Annual and long-term strategy: build an annual communications plan plus quarterly tactics for each OST program, including media and community touchpoints listed in 2.1.1 (e.g., radio/TV, internet campaigns, civic events, employer outreach, sports partnerships, website updates, public affairs).
- Workplan and approvals: finalize a quarter-by-quarter workplan, deliverable schedule, and review gates; submit for OST approval prior to production.
- Accessibility and brand standards: apply plain-language, ADA-aware, and OST brand requirements across all materials.

Deliverables: annual strategy deck, quarterly plans, message matrix, production calendar.

### **Materials design and production (Monthly sprints)**

- Creative brief and concepts: develop taglines and messaging that the public can readily identify with each OST Program (per 2.1.2), route for OST approval.
- Print and display assets: design enrollment booklets, single-sheet flyers, fold-over brochures, posters, banners, and display stands; prepare press-ready files and printer specs.
- Digital assets: prepare web graphics, email templates, social content, and short-form video/motion where appropriate; coordinate web updates with OST.
- Versioning and language access: provide versions for priority audiences (e.g., Spanish) and adjust for channel fit and readability.

Deliverables: creative brief, approved proofs, print-ready files, digital asset packages; OST may elect for the vendor to produce materials or to source production via competitive bids at OST's discretion.

### **Capacity Building Through Collaboration**

We don't just manage campaigns — we mentor internal partners. Our cross-functional teams conduct mini

working sessions on analytics interpretation, copy testing, and channel optimization, helping OST's team grow more confident with each cycle.

#### **Distribution and outreach coordination (As scheduled)**

- Event and community support: prepare materials for conventions, fairs, employer benefit fairs, and civic meetings; provide booth display files and print specs.
- Owned and paid channels: assist OST staff with internet marketing, email sends, and sponsored placements as needed; coordinate timelines with public affairs/media relations.

#### **Measurement, reporting, and improvement (Monthly/quarterly)**

- Monitoring framework: define KPIs for awareness, engagement, and enrollment/event outcomes; maintain a tracking dashboard and deliver scheduled reports requested by OST.
- Post-event and cycle wrap-ups: at the conclusion of CPSM enrollment periods or Unclaimed Property events, conduct awareness/buyer research as requested and present lessons learned to shape subsequent strategies.
- Governance: hold monthly status reviews and quarterly business reviews to align decisions and iterate materials and tactics.

Deliverables: monthly status updates, quarterly reports, post-event research summaries.

#### **Reusable Creative and Reporting Assets**

Every content series, reporting template, and automation flow we deliver is editable and portable, giving OST full ownership and flexibility to update or replicate assets independently.

#### **Project management, staffing, and quality control**

- Team and tools: We provide an integrated in-house team and use project trackers, staff matrices, and documentation protocols to ensure schedule, quality, and accountability.
- SLAs and approvals: define review cycles with OST for proofs, compliance checks, and final approvals; maintain a substantiation log and version control.
- Continuity: name backups for each role; provide an org chart and bios in the management section per evaluation criteria.

#### **Schedule and milestones (illustrative Year 1)**

- Month 0–1: discovery, annual strategy, Q1 plan, message matrix; initial creative briefs.
- Months 2–3: first production sprint for print/digital; event kits; initial website/email updates.
- Months 4–12: monthly production sprints; ongoing community/event support; monthly status reports; quarterly reviews and plan refresh.

#### **Commercial terms and compliance**

- Contract term and renewals: align delivery to the three-year base with two optional one-year renewals.
- Invoicing and payment type: We will invoice in arrears at the agreed interval (monthly), on a fixed price per completed task/activity as required.
- Ownership: all materials/data produced for OST will be owned by OST.
- Packaging note: We will keep all identifying information out of the Technical and Cost proposals and place staffing and company identity in the Management Proposal to maintain blind evaluation.

## **Service delivery approach and controls**

### **Purpose**

This Technical Proposal outlines how we will plan, produce, distribute, and measure communications and marketing materials for the Agency's programs. It operationalizes the enclosed "Appendix A — Deliverables & Review Gates Checklist" into a repeatable cadence with clear acceptance criteria and decision gates.

### **Reciprocity Through Transparency**

All performance data, optimizations, and financial pacing reports are shared in real time. This open-data model fosters institutional trust by ensuring that OST staff and our team make informed decisions together, using the same information.

### **Operating rhythm**

Plan → Produce → Distribute → Measure → Improve, executed in monthly sprints and governed by quarterly planning. Each sprint includes: discovery updates, creative brief, production, QA, approvals, and reporting.

### **Scope traceability**

The table below illustrates how we align our work with the RFP scope.

- RFP §2.1.1 Marketing Strategy → annual strategy; quarterly tactics plan; message matrix; audience map
- RFP §2.1.2 Marketing Materials Design/Production → creative briefs; concepts; print assets (flyers, brochures, banners, display stands); digital assets (web/email/social/video); language versions
- RFP §2.1.3 Evaluation of Results → KPI dashboard; monthly status report; quarterly business review; post-event wrap-ups and lessons learned

### **Workplan and review gates**

Our organization will use the following acceptance points (see Appendix A for the one-page checklist):

- S1 Strategy approval: the Agency approves the annual strategy and KPIs per program.
- S2 Quarterly plan approval: the Agency approves the next quarter's tactics and production calendar.
- P1 Concept approval: the Agency approves concepts and key messages before production.
- P2 Proof approval: the Agency approves final proofs and press-ready files before release/print.
- P3 Accessibility/brand QA: we certify WCAG-aware formatting, alt text, plain-language review, and brand compliance.
- D1 Event readiness: all event kits pass a readiness check at least five business days prior to the event.
- M1–M4 Measurement cycle: data QA, monthly status meeting, quarterly review decisions, and post-event lessons learned captured.

### **Quality assurance and accessibility**

- Plain language and readability: materials targeted to appropriate reading levels; jargon minimized; key actions surfaced.
- Accessibility: WCAG-aligned color contrast, font sizes, alt text for imagery, logical reading order, and accessible PDFs where applicable.
- Version control: single source of truth for files; proof logs maintained with date/time, approver, and hash checksum for final deliverables.
- Language access: Spanish and additional language versions as requested by the Agency; translation QA included as a review gate.

### **Project management and communication**

- Cadence: weekly working session; monthly status report and review; quarterly business review.
- Tools: shared production calendar; RACI; risk/issue (RAID) log; decision log; KPI dashboard.
- Continuity: named backups for each role; surge capacity for time-sensitive campaigns and events.

R = Responsible — does the work

A = Accountable — owns the outcome and signs off (only one A per task)

C = Consulted — gives input before work/decisions

I = Informed — kept in the loop after decisions/updates

### **Return Beyond the Contract**

Our goal is to create durable systems — not dependencies. By engagement's end, OST will retain structured toolkits, dashboards, and trained staff capable of maintaining campaign momentum without outside intervention.

### **Change control**

- Any change to scope, deliverables, or timeline is recorded in a change request, including rationale, impacts, and revised acceptance criteria.
- Changes require written Agency authorization before work proceeds.

### **Illustrative schedule (Year 1)**

- Month 0–1: discovery, annual strategy, message matrix, initial creative briefs
- Months 2–3: first production sprint for print and digital; event kit templates; initial web/email updates
- Months 4–12: monthly sprints; ongoing events support; monthly reports; quarterly plan refresh

### **KPIs and reporting**

Our Team will track and report on the following metrics: awareness (impressions, reach), engagement (CTR, site engagement, event interactions), efficacy (enrollment inquiries, event attendance), quality (approval cycle time, rework rate), and equity (language-version utilization as available). KPI targets will be confirmed at S1 and refined at each quarterly plan.

### **Data ownership and confidentiality**

All materials and data created under this contract are the Agency's property. Source files, working files, and production logs are delivered upon request and at close-out.

### **Compliance and packaging**

To preserve blind evaluation, this Technical Proposal contains only technical methods, processes, and deliverables. Staff identities, locations, and corporate information are confined to the Management Proposal; pricing appears only in the Cost Proposal.

**Partnership Philosophy & Communication Approach:** Our leadership team brings deep expertise in digital communications, brand strategy, and performance marketing. Co-Founders Kevin Miller and Jonathan Zacharias lead a nationally recognized agency trusted by leading brands such as Ritual, Lancer Skincare, and MVMT. Their guidance ensures that every campaign is grounded in data-driven best practices and executed with precision.

## Approach, Manpower, and Schedule by Service

**The Respondent shall provide information specifically describing their approach to providing each service listed, the manpower which will be devoted and required to fulfill each task, and the proposed schedule of time required to complete each task.**

### **Service: Marketing strategy (program plans for CSPM, Unclaimed Property, Executive/Agency)**

#### **Approach**

- Discovery and alignment: confirm goals, audiences, KPIs, compliance, and calendar.
- Annual plan + quarterly playbooks: channel mix, key messages, creative briefs, and event/PR opportunities.
- Accessibility and brand: plain-language, ADA-aware standards applied to all outputs.

#### **Manpower (FTE)**

- Engagement lead: 0.15 FTE steady state (0.25 in Month 0–1)
- Client success/PM: 0.20 FTE steady (0.25 in Month 0–1)
- Creative director (strategy input): 0.10–0.15 FTE during planning waves
- Paid media/social leads (inputs): 0.10 FTE combined during planning waves

#### **Schedule**

- Month 0–1: discovery, draft annual plan + Q1/Q2 playbooks, approvals
- Quarterly thereafter: 2-week refresh window before each quarter

### **Service: Marketing materials design and production (print, digital, video/motion, language versions)**

#### **Approach**

- Brief → concepts → proofs → final: iterate rapidly with weekly checkpoints.
- Print/display: brochures, flyers, banners, stands with press-ready files and specs.
- Digital: website graphics, email templates, social assets, short-form motion/UGC.
- Language access: prioritized translations; maintain a version log.

#### **Manpower (FTE)**

- Creative director: 0.15 FTE steady (0.20 in heavier sprints)
- Senior creative producer: 0.25 FTE steady (0.30 in heavier sprints)
- Email/lifecycle manager: 0.25 FTE steady for templating and QA
- Social/media managers: 0.25–0.30 FTE combined during asset build weeks

#### **Schedule**

- Monthly sprints: two-week cycles for concepting and proofing, one week for finalization/hand-off
- Turnarounds: standard 5–10 business days from approved brief to final files (complex displays 10–15)

### **Service: Distribution and outreach support (owned, paid, events/community)**

#### **Approach**

- Owned: publish email updates, post to web and social per calendar; ensure A/B tests and UTM tagging.
- Paid: schedule search/social/YouTube flights around program moments and events; weekly pacing/optimizations.
- Events: build event kits, displays, and handouts; prepare run-of-show and recap templates.

#### **Manpower (FTE)**

- Paid media lead: 0.20 FTE steady (0.25 during launches)



- Paid social director/manager: 0.35 FTE combined steady
- Client success/PM: 0.20 FTE steady for logistics and approvals
- Creative producer: 0.10–0.20 FTE around event windows

#### **Schedule**

- Ongoing: weekly channel ops and pacing; monthly campaign checks
- Event windows: materials locked two weeks prior; recap delivered within 10 business days post-event

#### **Service: Evaluation of results and continuous improvement**

#### **Approach**

- Define tracking and KPIs; build a dashboard covering awareness, engagement, and program outcomes.
- Monthly status: insights and actions; quarterly business reviews with plan updates.
- Post-cycle/readouts: synthesize what worked, retire underperformers, and update the backlog.

#### **Manpower (FTE)**

- Engagement lead: 0.10–0.15 FTE steady
- Channel leads (media/social/email): 0.10–0.20 FTE combined steady
- Analyst support: flex 0.10 FTE during reporting weeks

#### **Schedule**

- Monthly: metrics deck + actions
- Quarterly: QBR with plan refresh
- Annual: Year-end readout + Year-2 plan

#### **Empowered Partnership**

We treat collaboration as an exchange of expertise. We contribute deep marketing intelligence, while OST contributes invaluable program knowledge — together creating messages that resonate authentically with Mississippians.

## One-Page Schedule (Illustrative Year 1)

#### **Month 0–1**

- Discovery, annual strategy, and Q1 plan
- First wave of creative briefs
- Dashboards set up

#### **Month 2–3**

- Sprint 1: print + digital assets; email templates; first placements
- Event kit package 1; website graphics

#### **Months 4–5**

- Sprints 2–3; owned/paid optimization
- Monthly status; minor plan tunes

## Month 6

- QBR and plan refresh; mid-year creative updates

## Months 7–9

- Sprints 4–5; event season support; ongoing optimization

## Months 10–11

- Next-cycle strategy workshop; brief wave for next year

## Month 12

- Annual readout; Year-2 plan and calendar

## Staffing notes

- Continuity: every lead has a named backup; meeting rhythm includes weekly WBRs and quarterly QBRs.
- Approvals: proofs and trafficking are gated; nothing ships without OST sign-off.
- Flex capacity: additional creative/analyst support is available for surges and deadlines.

## Matrices: Approach, Manpower, and Schedule

Approach • Manpower • Schedule			
Service	Approach (how we'll do it)	Manpower (FTE)	Schedule (when/how long)
Marketing strategy (CSPM, Unclaimed Property, Executive/Agency)	Discovery and alignment; annual plan with quarterly playbooks; channel mix and key messages; accessibility/brand standards applied to all outputs	Engagement lead 0.15 (0.25 in Month 0–1); Client success/PM 0.20 (0.25 in Month 0–1); Creative director 0.10–0.15 during planning waves; Media/Social leads 0.10 combined during planning waves	Month 0–1: discovery + annual plan + Q1/Q2 playbooks approved; quarterly: 2-week refresh before each quarter
Marketing materials design & production (print, digital, motion, language versions)	Brief → concepts → proofs → final; press-ready print/display assets; digital assets (web/email/social/motion/UGC); prioritized translations + version log	Creative director 0.15 (0.20 in heavy sprints); Senior creative producer 0.25 (0.30 in heavy sprints); Email/lifecycle manager 0.25; Social/Media managers 0.25–0.30 combined during build weeks	Monthly sprints: 2 weeks concept/proof, 1 week finalization/hand-off; typical turnaround 5–10 business days (complex displays 10–15)
Distribution & outreach support (owned, paid, events/community)	Owned: publish email/web/social per calendar with A/B + UTM; Paid: search/social/YouTube around	Paid media lead 0.20 (0.25 during launches); Paid social director/manager 0.35	Ongoing weekly ops and pacing; monthly campaign checks; event materials locked

	program moments with weekly pacing/optimizations; Events: event kits, displays, handouts, run-of-show + recap	combined; Client success/PM 0.20; Creative producer 0.10–0.20 around event windows	2 weeks prior; recap within 10 business days post-event
Evaluation & continuous improvement	KPIs and tracking; dashboard; monthly insights/actions; quarterly business review; post-cycle readouts to retire underperformers and update backlog		Monthly status deck; Quarterly QBR + plan refresh; Annual readout + Year-2 plan

### Compliance Crosswalk

RFP clause / requirement	Our activities	Deliverables / outputs	Evidence / artifacts	OST review & approval gates
2.1.1 Marketing strategy	Discovery; audience/KPI definition; annual plan; quarterly tactics per program; channel mix/calendar	Annual strategy deck; quarterly plans; message matrix; production calendar	Kickoff notes; approval emails; version-controlled plans	Kickoff; strategy approval; quarterly plan sign-off
2.1.2 Materials design & production	Creative briefs; concepts; copy/design; accessibility review; print/digital prep; language versions	Approved proofs; print-ready files; digital asset packages; spec sheets	Briefs; proof PDFs; ADA checklist; translation logs	Concept review; proof approval; production go/no-go
2.1.3 Evaluation of results	Define KPIs; dashboard; monthly reporting; post-event/cycle analysis and recommendations	Monthly status reports; quarterly reviews; lessons-learned memos	Reporting deck; data exports; improvement backlog	Monthly status; QBR; end-of-cycle readout
Community & event support	Event kit planning; booth/display files; pre/post comms; logistics support	Event kits; run-of-show; recap	Print specs; vendor quotes; photo logs (as available)	Event materials approval; post-event recap review
Owned & paid channel support	Email builds/sends; website asset coordination; paid placements	Email templates; web assets; paid media placements plan	UAT checklists; change logs; trafficking sheets	Pre-launch QA; launch approval; weekly pacing check

Project management & quality	calendar and trafficking			
	Weekly WBR; risk/issue tracking; decision log; backups; version control	Action register; RAID log; decision log; staffing matrix	WBR minutes; RAID tracker	Weekly WBR; monthly governance review

### Illustrative One-Year Work Plan

Timeline	Key tasks & milestones	Primary owners	Outputs	Approval gate
Month 0–1	Discovery; annual strategy; Q1 plan	(Engagement), (Lifecycle)	Strategy deck; Q1 plan; message matrix	Strategy approval
Month 2	Creative brief; Sprint 1 (print + digital)	(Creative), (Production)	Proofs; print-ready files; email/social assets	Concept + proof approvals
Month 3	Event kit build; initial web/email updates; paid placements (if applicable)	(CS), (Paid Media), (Paid Social)	Event kits; web graphics; trafficking sheets	Pre-launch QA
Months 4–5	Sprints 2–3; A/B testing; monthly reporting	All workstreams	Monthly status; refreshed assets	Monthly status review
Month 6	Quarterly business review; plan refresh	Engagement + Leads	QBR deck; revised roadmap	QBR approval
Months 7–9	Sprints 4–5; event support; optimization	All workstreams	Assets; reports; recaps	WBR + mid-quarter check
Months 10–11	Next-cycle strategy and briefs	Engagement + Leads	Draft next-cycle plan; briefs	Plan approval
Month 12	Annual readout; Year-2 plan	Engagement + Leads	Annual results; Year-2 plan	Annual approval

### RACI Matrix

Activity	OST Lead	Engage	Client	Life Cycle	E-Mail CM	Paid Soc. Dir	Soc. CM)	Med. Lead	Create. Dir	Sr. Create. Prod.
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Strategy & annual plan	A	R	C					C	C	
Quarterly plan refresh	A	R	C					C	C	
Creative brief & concepts	A	C	C						R	C
Asset production (print/digital)	A	C	C						A/R	R
Email/life-cycle builds	A	C	C	A/R	R					
Paid social planning & ops	A	C	C			A	R			
Paid search/YouTube ops	A	C	C					A/R		
Event kit & logistics support	A	C	R						C	C
Website asset coordination	A	C	R						C	C
Reporting & dashboards	A	R	C	C	C	C	C	C		
Governance (WBR/QBR)	A	R	R							
Risk/issue MGMT	A	R	R							

Service	Approach	Manpower (FTE)	Schedule (when/how long)
Marketing strategy (program plans for CSPM, Unclaimed Property, Executive/Agency)	Discovery and alignment; annual plan with quarterly playbooks; channel mix and key messages;	Engagement lead 0.15 (0.25 in Month 0-1); Client success/PM 0.20	Month 0-1: discovery + annual plan + Q1/Q2 playbooks approved; each quarter: 2-week refresh before start

Service	Approach	Manpower (FTE)	Schedule (when/how long)
	accessibility/brand standards applied to all outputs	(0.25 in Month 0–1); Creative director 0.10–0.15 during planning waves; Media/Social leads 0.10 combined during planning waves	
Marketing materials design and production (print, digital, motion, language versions)	Brief → concepts → proofs → final; print/display assets (brochures, flyers, banners, stands) with press-ready files; digital assets (web graphics, email templates, social, short-form motion/UGC); prioritized translations + version log	Creative director 0.15 (0.20 in heavy sprints); Sr. creative producer 0.25 (0.30 in heavy sprints); Email/lifecycle manager 0.25; Social/Media managers 0.25–0.30 combined during build weeks	Monthly sprints: 2 weeks concept/proof, 1 week finalization/hand-off; typical turnaround 5–10 business days (complex displays 10–15)
Distribution and outreach support (owned, paid, events/community)	Owned: publish email/web/social per calendar with A/B tests + UTM tagging; Paid: search/social/YouTube around program moments; weekly pacing/optimizations; Events: event kits, displays, handouts, run-of-show + recap	Paid media lead 0.20 (0.25 during launches); Paid social director/manager 0.35 combined; Client success/PM 0.20; Creative producer 0.10–0.20 around event windows	Ongoing weekly ops and pacing; monthly campaign checks; event materials locked 2 weeks prior; recap within 10 business days post-event
Evaluation and continuous improvement	Define KPIs and tracking; dashboard; monthly insights/actions; quarterly business review with plan updates; post-cycle readouts to retire underperformers and update backlog	Engagement lead 0.10–0.15; Channel leads (media/social/email) 0.10–0.20 combined; Analyst support flex 0.10 during reporting weeks	Monthly status deck; Quarterly QBR + plan refresh; Annual readout + Year-2 plan

## Quality Management Practices

**Each Respondent shall describe its quality management practices and achievements in same. Respondent shall include examples of current quality reporting.**



Please see our examples of quality reporting in Appendix A.

### Quality policy and governance

Our Team maintains an end-to-end quality system designed to prevent defects, surface risks early, and document decisions. Quality is governed through weekly business reviews (WBRs) and quarterly business reviews (QBRs), with clear owners, SLAs, and approval gates for every deliverable.

### Planning and approvals

- Requirements capture: written briefs confirm objectives, audiences, KPIs, accessibility, formats, and deadlines.
- Version control: all artifacts use standardized file naming, change logs, and a decision log to capture approvals.
- Risk/issue tracking: a RAID register is reviewed in WBRs; high-impact items have owners and due dates.

### Creative and production controls

- Two-step review: concept review (fit to brief) and proof review (accuracy, accessibility, brand).
- Accessibility and plain-language: readability targets; alt text and color-contrast checks; translation/version logs.
- Print preflight: trim/bleed, color space, linked assets, fonts, image resolution; press-ready PDFs with specs.
- Digital QA: link checks, UTM standards, responsive layout checks, image optimization, file weights.

### Channel execution controls

- Email/lifecycle: seed-list tests, render checks, suppressions, deliverability monitoring, and rollback criteria.
- Paid social/search/YouTube: trafficking checklist, naming conventions, budgets/pacing alerts, policy compliance.
- Web/social publishing: staging approvals, accessibility checks, and scheduled posts with owner sign-off.

### Measurement and continuous improvement

- KPI framework: leading (reach, delivery, QA pass rate) and lagging (engagement, conversion/desired action) indicators defined per program.
- Monthly and quarterly reporting: dashboards, insights, and a prioritized improvement backlog; closed-loop tracking from recommendation to implementation.

### Roles and accountability

- Engagement lead: accountable for overall quality and outcomes; chairs WBR/QBR.
- Client success: owns timeline, approvals, RAID, decision log.
- Creative director: responsible for creative brief quality, brand/accessibility compliance, and final sign-off.
- Channel leads: responsible for trafficking QA, policy compliance, pacing, and performance accuracy.

### Weekly WBR Summary

Workstream	Status	Key accomplishments	Risks/issues (owner, due)	Approvals needed next week
Creative/Production	On track	CPSM brochure proofs approved	Event poster final art pending printer specs (Shaun, Fri)	Unclaimed Property social set 2 concepts
Email/Lifecycle	On track	Welcome series A/B launched	Deliverability dip on domain B (Zach, Wed)	Q2 nurture calendar sign-off

Workstream	Status	Key accomplishments	Risks/issues (owner, due)	Approvals needed next week
Paid Media	Watch	Search campaigns live	CPA above target; add exact-match set (Kira, Thu)	YouTube flight schedule
Paid Social	On track	New creative tests built	None	Creative test wave 3 approval

Date	Item	Severity	Resolution time	Root cause	Corrective action
Apr 3	Broken link in email v1 (caught in QA)	Low	15 min	Template token mismatch	Added link-lint step to pre-send checklist
Apr 18	Printer color shift on banner proof	Medium	1 day	Pantone conversion	Locked CMYK profile; printer test strip required

#### Approval gates we observe

- Strategy plan approval; concept approval; proof approval; production go/no-go; pre-launch QA; post-launch check; monthly and quarterly reviews.

#### Quality achievements

- Sustained on-time delivery above 95% and first-proof QA pass rates above 98% across comparable multi-workstream programs.
- Mature governance with documented RAID/decision logs and traceable approval history.

**Partnership Philosophy & Communication Approach:** We operate as a collaborative extension of OST's internal team—sharing tools, templates, and performance insights that strengthen OST's long-term marketing capacity. Our approach ensures mutual value: OST benefits from both immediate campaign results and transferable frameworks for future programs.

## Plan To Implement Scope of Services

**Each Respondent shall provide a written statement of their firms understanding of the services requested herein as well as a detailed written plan outlining how the firm proposes to go about providing services required by Section II.**

Our organization understands the Agency seeks a partner to plan and execute strategic communications that increase awareness and engagement for its programs. The scope includes: (1) annual and quarterly marketing strategy; (2) design and production of multi-format marketing materials (print, digital, motion); (3) distribution support across owned and paid channels and at community/event touchpoints; and (4) evaluation of results with routine reporting and continuous improvement. Please see our above detailed written plan under Section — Approach, manpower, and schedule by service.



## **Plan of performance**

### **Phase 1 — Discovery and strategy (Month 0–1)**

- Confirm program goals, audiences, KPIs, calendar, and compliance needs
- Deliver an annual strategy with quarterly playbooks, message matrix, and production calendar
- Establish governance: weekly WBRs, quarterly business reviews, approval gates, and version control

### **Phase 2 — Materials design and production (monthly sprints)**

- Convert strategy to creative briefs; develop concepts; route proofs for approval
- Produce press-ready print assets (brochures, flyers, banners, displays) and digital assets (web graphics, email templates, social/motion)
- Apply accessibility and plain-language standards; provide language versions as requested

### **Phase 3 — Distribution and outreach**

- Support owned channels (web, email, social) and paid placements (search, social, YouTube) per the approved calendar
- Build event kits and display packages; prepare run-of-show and post-event recap templates

### **Phase 4 — Measurement and improvement**

- Maintain a KPI dashboard; provide monthly status updates and quarterly reviews
- Produce post-cycle readouts; retire underperformers; update the backlog and next-quarter plan

### **Staffing and time allocation (steady-state estimates)**

- Engagement lead (0.15 FTE) and client success/project management (0.20 FTE)
- Creative director (0.15 FTE) and senior creative producer (0.25 FTE; flex up during sprints)
- Lifecycle/email manager (0.25 FTE); paid social team (0.35 FTE combined); paid media lead for search/YouTube/display (0.20 FTE)

### **Schedules and service levels**

- Planning waves: Month 0–1, then two weeks prior to each quarter for refresh
- Production: two-week concept/proof cycle + one-week finalization; typical 5–10 business-day turn on standard assets (10–15 for large displays)
- Reporting: monthly status, quarterly business reviews, annual readout

### **Risk Management & Contingencies**

- Compressed legislative timelines → maintain surge capacity and pre-approved templates.
- Media availability swings → diversified channel plan and flexible placements calendar.
- Privacy/compliance → documented approval gates; version control; audit-ready logs.

### **Assumptions & Dependencies**

- Timely access to data, brand standards, and approvals.
- Designated Agency points of contact for strategy, creative, and public affairs.
- Scheduling alignment for community events and enrollment cycles.

**Proven history and experience in dealing with specialized projects. Due scope of services provided by OST, expertise in managing specialized marketing programs that touch multiple markets is desired. Experience in market research and direct marketing campaigns to target certain demographics is preferred.**

Our team has planned and executed specialized, multi-market programs across marketplaces, organic search, paid media, and lifecycle channels. Representative outcomes include: increasing conversion rates and ordered sales in a regulated supplement category through storefront redesign and conversion-focused creative; scaling organic traffic from tens of thousands to hundreds of thousands of monthly visitors via research-driven content and landing-page optimization; executing a time-sensitive, high-SKU product launch across shopping ads and social with strong return on ad spend; reversing performance decline for a prestige skincare program with targeted audience strategies and creative iteration to deliver significant month-over-month revenue growth; sustaining high ROAS for a premium CPG line through Performance Max segmentation and remarketing; expanding new-to-brand customers for a men's health line using commerce DSP audiences; lifting total revenue for a tools/accessories seller through non-brand acquisition; growing subscriptions for a women's wellness line with subscribe-and-save optimization; and more than doubling monthly email revenue through redesigned templates, segmentation, and testing. Collectively, these efforts demonstrate expertise in market research and direct marketing to reach specific demographics and deliver measurable results across multiple markets.

**Knowledge of emerging marketing strategies with the desire to relay that to the client to broaden our understanding and scope of our target markets to better reach and communicate with our constituents.**

### **Our philosophy**

We actively scan, test, and operationalize emerging strategies across paid, owned, and earned channels—then translate what works into simple, reusable playbooks that expand understanding of target markets and strengthen constituent communication.

### **How we stay current (horizon scanning)**

- Ongoing review of platform updates, policy changes, and new ad formats
- Quarterly synthesis of behavior shifts (search intent, social creative trends, inbox deliverability, onsite UX patterns)
- Accessibility and language-inclusion checks woven into every tactic

### **Experimentation → adoption pipeline**

1. Identify opportunities: new placements, creative framings, audience definitions, or data signals.
2. Design micro-tests: small pilots with clear hypotheses, guardrails, and success thresholds.
3. Run and observe: 2–4 week sprints with weekly readouts.
4. Decide and scale: if thresholds are met, we standardize into playbooks and fold into the quarterly plan.

### **What we share with you (knowledge transfer)**

- Playbooks (6–10 pages): audience insight, use cases, set-up steps, sample creative/copy frames, QA checklist, measurement plan
- Briefings: monthly 30-minute “what’s new/what’s next” walk-throughs
- Toolkits: swipe files for headlines/hooks, creative specs, and compliance notes
- Office hours: structured Q&A for program leads and field partners
- Post-pilot debriefs: objective, what we tried, results, what we keep/stop/adjust

### **Where it matters (constituent reach)**

- Urban/rural/small-town segmentation: channel mixes tailored to access, device, and media habits
- Community touchpoints: civic, employer, and event activation with localized messages
- Lifecycle and direct response: email/SMS best practices (list hygiene, segmentation, frequency, plain-language readability)
- Web and content: search-informed topics, accessibility-first layouts, multilingual versions as appropriate

### **Measurement & governance**

- Pilot scorecard: reach, engagement quality, cost/efficiency, and equity of reach across target groups
- Quarterly reviews: retire underperformers; scale proven tactics; refresh audiences and creative
- Documentation: every adopted tactic has a versioned playbook and a QA checklist

### **90-day roadmap (example)**

- Days 1–30: horizon scan, opportunity shortlist, 2–3 micro-tests planned and approved
- Days 31–60: run pilots; weekly readouts; first playbook drafted
- Days 61–90: scale winners into the quarterly plan; deliver 1–2 playbooks + a “what’s next” briefing

### **Deliverables**

Playbooks, pilot briefs, weekly test readouts, monthly “emerging strategies” briefing, and a living toolkit (copy frames, specs, checklists). Each item is written in plain language so internal teams and partners can apply it immediately.

### **Result**

You gain a steady stream of practical, field-ready tactics—and the know-how to apply them—so your target markets are understood more precisely and your communication with constituents becomes measurably clearer, more inclusive, and more effective.

**Staff dedicated to creative with at least 5 years of experience in graphic design for large marketing campaigns that vary in interest and target markets. Staff specialized in analytics to assist in breaking down market research and developing creative approaches**

### **Staff dedicated to creative (5+ years, large campaigns; varied audiences/markets)**

Our creative bench includes senior leadership and producers with 5–10+ years guiding end-to-end content strategy, video and motion production, and cross-functional creative delivery for multi-channel, large-scale marketing campaigns. Their work spans concepting through post-production, team mentorship, and on-time, on-budget execution across diverse audience segments and platforms.

### **Dedicated creative staff (5+ years; large, multi-market campaigns)**

- Creative Director.
- Senior Creative Producer.

### **Staff specialized in analytics (market research → creative development)**

Our lifecycle, paid media, and paid social specialists bring deep analytics proficiency—translating platform data, campaign performance, and audience signals into clear market insights and actionable creative direction. This includes constructing cross-channel strategies, leading performance reviews, optimizing segmentation and deliverability, and converting test results into creative iterations and media adjustments that better reach defined demographics.

### **Analytics-specialized staff (market research → creative approaches)**

- Director, Email & SMS (Lifecycle Marketing Lead).
- Senior Email Campaign Manager.
- Senior Campaign Manager, Paid Media.
- Paid Social Director.
- Senior Campaign Manager, Paid Social.

Role	Years in communications/marketing	Focus areas (scope)	Financial-services/investments exposure
Engagement Lead (Director, Client Activation)	11+	Full-funnel strategy; client activation; KPI/governance; cross-functional leadership	Oversees portfolios that include regulated/finance-adjacent brands.
Director, Email & SMS	10+	Lifecycle strategy; segmentation/cadence; automation; reporting	Lifecycle frameworks applicable to financial-comms (compliance, deliverability).
Sr. Email Campaign Manager	6+	Email calendar/build/QA; deliverability; analytics; retention	Experience translating complex topics into accessible email flows.
Sr. Campaign Manager, Paid Media	7+	Search/YouTube/display; \$1M+ monthly budgets; testing; pacing	Search/YouTube programs in regulated/brand-safe categories.
Director, Paid Social	3+ (senior leadership)	Cross-platform paid social; creative testing; escalation/governance	Practices for budget/pacing and approvals compatible with finance topics.
Account Management (Client Success)	6+	Program management; approvals; risk/issue control; reporting cadence	Coordinates compliance packaging and stakeholder reviews.
Creative Director	10+	Briefs; content roadmap; QA; accessibility/brand standards	Plain-language asset development for sensitive/regulated messaging.
Sr. Creative Producer	5+	Print/digital/motion production; vendor/creator pipeline; on-time delivery	Experienced with high-scrutiny brands; rigorous proofing and version control.

## Appendix A

### Deliverables & Review Gates Checklist

#### 1) Planning & Strategy

Deliverable	Due / Cadence	Owner	Review Gate / Approval	Status <input type="checkbox"/>
Annual Communications Strategy (per program)	Month 1; refreshed annually	Engagement Lead	Gate S1: OST Strategy Approval	<input type="checkbox"/>
Quarterly Tactics Plan (per program)	Quarterly, prior to sprint	Engagement Lead	Gate S2: OST Quarterly Plan Approval	<input type="checkbox"/>
Message Matrix & Audience Map	Month 1; update as needed	Lifecycle Lead	Gate S3: Messaging Sign-off (Public Affairs)	<input type="checkbox"/>

#### 2) Materials Design & Production

Deliverable	Due / Cadence	Owner	Review Gate / Approval	Status <input type="checkbox"/>
Creative Brief + Concepts	Each sprint (monthly)	Creative Director	Gate P1: Concept Approval	<input type="checkbox"/>
Print Assets (flyers, brochures, banners)	As scheduled	Creative Director	Gate P2: Proof Approval (Pre-press)	<input type="checkbox"/>
Digital Assets (web/email/social/video)	As scheduled	Lifecycle/Paid Leads	Gate P3: Accessibility & Brand QA	<input type="checkbox"/>
Language Versions (e.g., Spanish)	As needed	Creative Producer	Gate P4: Translation QA / OST Approval	<input type="checkbox"/>

#### 3) Distribution & Outreach

Deliverable	Due / Cadence	Owner	Review Gate / Approval	Status <input type="checkbox"/>
Event Kits (booth displays, posters)	Per event	Account Management	Gate D1: Event Readiness Check	<input type="checkbox"/>
Email Sends / Owned Channel Updates	Per calendar	Lifecycle Lead	Gate D2: Content & List QA	<input type="checkbox"/>
Paid Placements (search/social/video)	As authorized	Paid Media/Social Leads	Gate D3: Media Plan Approval	<input type="checkbox"/>

#### 4) Measurement, Reporting & Improvement

Deliverable	Due / Cadence	Owner	Review Gate / Approval	Status <input type="checkbox"/>
KPI Tracking Dashboard	Monthly	Analytics/Channel Leads	Gate M1: Data QA / OST Review	<input type="checkbox"/>
Monthly Status Report (MSR)	Monthly	Account Management	Gate M2: MSR Review Meeting	<input type="checkbox"/>
Quarterly Business Review (QBR)	Quarterly	Engagement Lead	Gate M3: QBR Decisions & Actions Logged	<input type="checkbox"/>
Post-Event / Cycle Wrap-Up	Post-event/period	Channel Leads	Gate M4: Lessons Learned Approved	<input type="checkbox"/>

#### 5) Project Management & Quality Reporting

1. Deliverable	Due / Cadence	Owner	Review Gate / Approval	Status <input type="checkbox"/>
Production Calendar & RACI	Month 1; maintain weekly	Account Management	Gate Q1: Calendar Sign-off	<input type="checkbox"/>
Proof Log & Version Control	Ongoing	All Workstreams	Gate Q2: Final File Check	<input type="checkbox"/>
Risk/Issue Log (RAID)	Weekly	Account Management	Gate Q3: RAID Review	<input type="checkbox"/>
Backups & Coverage Plan	Month 1; update quarterly	Engagement Lead	Gate Q4: Continuity Confirmed	<input type="checkbox"/>

#### 6) Schedule & Milestones (Illustrative Year 1)

Deliverable	Due / Cadence	Owner	Review Gate / Approval	Status <input type="checkbox"/>
Discovery & Annual Strategy	Month 0–1	Engagement Lead	Gates S1–S3 complete	<input type="checkbox"/>
Initial Production Sprint	Months 2–3	Creative Director	Gates P1–P3 complete	<input type="checkbox"/>
Ongoing Sprints & Reviews	Months 4–12	Channel Leads	Gates D1–D3 / M1–M4 recurring	<input type="checkbox"/>

## GR0 LLC – Cost Proposal

### RFP #3120003221 – Communications and Marketing Consultants Mississippi Office of the State Treasurer

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#### 1. Overview of Pricing Approach

GR0's pricing model is designed for transparency, scalability, and measurable value. Our rates reflect the experience of a senior digital-first agency while being aligned with public-sector budgets in Mississippi. All costs are fully inclusive of labor, supervision, creative development, analytics, technology, and administrative overhead.

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#### 2. Service Rates by Function

Function	Proposed Rate	Scope of Work Covered
Program & Project Leadership	\$130/hr	Strategic planning, coordination, stakeholder management, status reporting.
Creative Development & Design	\$120/hr	Concept design, copywriting, graphics, layout, accessibility review, and asset production.
Paid Media & Campaign Management	\$112/hr	Media strategy, ad placement, pacing, performance optimization, and reporting.
Digital Engagement (Email / SEO / Web)	\$108/hr	Content creation, web updates, SEO/SEM, and lifecycle marketing.
Research, Measurement & Analytics	\$99/hr	Surveys, KPI tracking, dashboards, and post-campaign performance analysis.

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#### 3. Campaign Media and Placement

- GR0 will manage paid placements transparently with a **10.8% commission** on actual media spend.
  - Rate includes campaign setup, targeting, testing, and reporting.
  - Discount tiers** are automatically applied when annual media expenditures exceed **\$200,000**.
- 

#### 4. Creative Asset Production

Below are representative production costs for campaign deliverables. All assets are developed in compliance with ADA accessibility, plain-language, and OST brand standards.

Asset Type	Unit Price	Includes
Community Mailer (tri-fold)	\$1.50 each	Design, layout, and print-ready artwork.
Digital Display Set (5-size ad package)	\$950 per set	Static and motion versions, optimized for Google and Meta.
Public Information Poster (24x36)	\$8.50 each	Full-color, matte or gloss finish.
Event Banner (Vinyl / Retractable)	\$43.00 each	Layout, graphic prep, and print-ready file.
30-Second Video Spot	\$3,400 each	Scripting, filming, editing, subtitles, and sound mixing.
Radio Spot (15–30 sec)	\$850 each	Script, voiceover, editing, and delivery in broadcast format.
Email Template Design	\$275 per template	Responsive layout, copywriting, and QA testing.

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## 5. Performance Reporting and Insights

- Campaign dashboards and monthly performance summaries are included within the base hourly rates.
- For post-event or end-of-year evaluations requiring primary data collection (e.g., surveys or focus groups), rates will be billed under **Research & Analytics (\$99/hr)**.

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## 6. Billing and Terms

- **Frequency:** Monthly, in arrears.
- **Format:** Each invoice will include a breakdown of deliverables, hours, and media spend.
- **Payment:** Net-30 from receipt.
- **Ownership:** All materials produced under this agreement become the property of the Mississippi Office of the State Treasurer.

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## 7. Summary of Rates and Units – APPENDIX A

Category	Rate / Unit
Program & Project Leadership	\$130 per hour
Creative Development & Design	\$120 per hour



<b>Category</b>	<b>Rate / Unit</b>
Paid Media & Campaign Management	\$112 per hour
Digital Engagement (Email / SEO / Web)	\$108 per hour
Research, Measurement & Analytics	\$99 per hour
Media Commission	10.8% of media spend (discount tiers apply above \$250k)
Community Mailer	\$1.50 each
Digital Display Ad Set	\$950 per set
Poster	\$8.50 each
Banner	\$43 each
Video Spot (30 sec)	\$3,400 each
Radio Spot	\$850 each
Email Template	\$275 each

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## **8. Value Statement**

GR0's cost structure is intentionally straightforward — enabling OST to predict spend, track ROI, and maintain flexibility as campaign needs evolve.

All services are scalable across the three-year base term and optional renewals, ensuring cost stability and continuity.

