



# Management 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>Cover Letter</b>	<b>3</b>
<b>Management Proposal</b>	<b>5</b>
<b>Key personnel</b>	<b>6</b>
<b>Respondent's Organization And Credentials</b>	<b>11</b>
<b>Quality Management Practices (with Sample Reporting)</b>	<b>20</b>
<b>Appendix A</b>	<b>22</b>



## Cover Letter

### **Gr0 LLC**

12511 Beatrice St  
Los Angeles, California, 90066  
[www.Gr0.com](http://www.Gr0.com)

October 14, 2025

Mississippi Office of the State Treasurer (OST)  
501 N. West Street, Suite 1101  
Jackson, MS 39201

### **RE: Proposal Submission – RFP# - 3120003221, Communications and Marketing Consultants**

Dear Theresa Abadie:

GR0 LLC (GR0) is pleased to submit our proposal in response to the Mississippi Office of the State Treasurer's RFP# - 3120003221, Communications and Marketing Consultants RFP. We applaud the OST's leadership in managing the State's financial resources, overseeing the wise investment of funds, and searching for new opportunities to enhance the State's economy. We are excited by the opportunity to help shape behavior change through culturally relevant and data-informed marketing.

GR0 specializes in driving measurable outcomes for both brands and public initiatives. Our mission is to demystify online marketing for organizations, allowing them to realize their full potential in crowded and regulated spaces. We serve as a natural extension of our clients' teams—combining creativity, compliance, and digital fluency to execute impactful campaigns from start to finish.

### **Our track record is bold and proven:**

- **Over \$1 billion in revenue generated** for clients through performance marketing.
- **Landing pages that increase conversion rates by 50–100%.**
- **\$500 million+ in Google Ads spend managed** by our team of experts.
- **70% of our client base comes from referrals**—a testament to our results and reliability.

Our proposal addresses all components of the Communications and Marketing Consultants' scope, including:

- Marketing Strategy
- Marketing Materials Design
- Evaluation Of Communication And Marketing Results



Our excellence has been recognized across the industry, including:

- **2023 Search Engine Land Award – Best SEO Initiative – Agency**
- **Adweek’s Fastest Growing Agencies (2 years in a row)**
- **Inc. 5000 Fastest Growing Private Companies in America**
- **Featured as a “Top Digital Marketing Agency” by Clutch and DesignRush**

Our campaigns are built for Mississippi—reaching urban, rural, and small-town audiences through public affairs, radio/TV, digital/social, website updates, civic and employer outreach for College Savings and Unclaimed Property—supported by post-event research and written/oral reporting as requested.

Primary contact information for this proposal is as follows:

- **Contact Name:** Jonathan Zacharias/President
- **Phone:** 310-386-3319
- **Email:** [jz@gr0.com](mailto:jz@gr0.com)

Thank you for considering our proposal. We look forward to the opportunity to support the OST’s Communications and Marketing Consultants’ requirements with a powerful, inclusive, and evidence-based marketing strategy.

Warmly,

*Jonathan Zacharias*

Jonathan Zacharias  
President  
[jz@gr0.com](mailto:jz@gr0.com)  
310-386-3319

## Management Proposal

**The name of the consultant and all principals, the location of the consultant's primary place of business and, if different, the place of performance of the proposed contract;**

Consultant (legal name): GR0 LLC

Principals: Jonathan Zacharias, Co-Founder & President; Kevin Miller, Co-Founder & Chief Executive Officer

Primary place of business: 12511 Beatrice St, Los Angeles, CA 90066

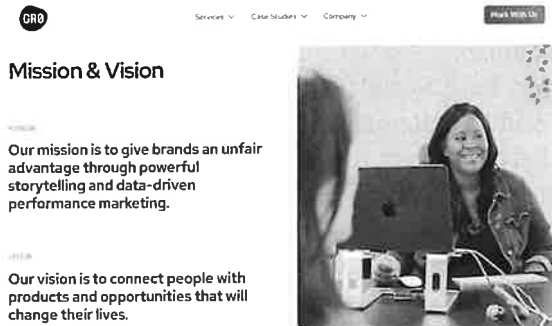
Place of performance: Work will be performed primarily from GR0's Los Angeles headquarters with on-site meetings and activities at the Office of the Mississippi State Treasurer in Jackson, Mississippi, as requested by the Agency.

**The age of the consultant's business and average number of employees over a previous period of time, as specified in the Request for Proposal;**

Age of business: GR0 LLC was founded in 2020; as of October 12, 2025, the firm is 5 years old.

Average number of employees (previous 12 months): During October 1, 2024 – September 30, 2025, GR0 averaged approximately 125–150 full-time employees (FTEs). This aligns with publicly reported company-size bands of 51–200 employees and third-party snapshots showing 75–176 employees in recent years.

**The abilities, qualifications, and experience of all persons who would be assigned to provide the required services;**



### **Team overview:**

GR0 will staff this engagement with a cross-functional team covering strategy, lifecycle (email/SMS), paid media, paid social, and creative production. The team brings deep DTC and eCommerce experience with a record of ROI-positive growth, strong client retention, and large-scale campaign execution.

**Partnership Philosophy & Communication Approach:** Our team shares OST's mission of community empowerment. Every message we craft centers on the belief that Mississippians deserve transparent, accessible information that helps them make informed decisions about their financial future. GR0 is committed to amplifying that mission with authenticity and measurable reach.

***GR0's Strength:*** GR0 has generated over \$1 billion in revenue for its clients through measurable, data-driven performance campaigns.



## Key personnel

### **Engagement Lead — Director, Client Activation: Sarah Magaña**

11+ years in digital marketing leading client onboarding, growth strategy, and retention for D2C brands; Hermes Creative Awards Platinum for strategic marketing. Responsibilities: executive alignment, growth roadmap, performance governance.

### **Lifecycle Marketing Lead — Director, Email & SMS: Jordan Vanek**

Builds retention programs across email/SMS; established GR0's Klaviyo Elite Partner practice; focuses on LTV, segmentation, and experimentation. Responsibilities: lifecycle strategy, automation architecture, testing/analytics.

### **Senior Email Campaign Manager: Zachary Witzig**

Manages lifecycle programs across multiple brands; maintains high client retention and clear growth planning. Responsibilities: calendar/cadence, segmentation, copy/creative coordination, reporting.

### **Paid Media Lead — Senior Campaign Manager, Paid Media: Kira Terry**

Runs ecommerce/lead-gen across Google, Microsoft, Meta, TikTok, Snapchat, YouTube, CTV, and Programmatic; previously oversaw \$1M+ monthly spend. Responsibilities: full-funnel media strategy, budget/pacing, optimization.



### **Paid Social Director: Jessica Muntz**

Directs paid social for high-value accounts; experienced across Meta, LinkedIn, TikTok; known for creative testing at scale and team mentorship. Responsibilities: social strategy, creative iteration, P&L stewardship for social workstream.

### **Senior Campaign Manager, Paid Social: Adam Witmer**

Leads DTC social planning and execution; certified Meta and TikTok media buyer; prior omni-channel growth marketer. Responsibilities: audience architecture, offer/creative iteration, KPI management.

### **Client Success — Account Management: Ashley Wines**

Owns strategic relationships in enterprise-scale environments; drives retention and cross-functional delivery. Responsibilities: weekly business reviews, delivery coordination, risk/issue management.

### **Creative Director: Shaun Lewin**

Leads creative strategy and production workflows; integrates performance insights into briefs and content roadmaps. Responsibilities: creative brief development, content calendar, quality and velocity.

### **Senior Creative Producer: Justin Ercole**

Delivers high-impact ad creative and UGC; manages creator onboarding and rapid video/motion production. Responsibilities: UGC sourcing and direction, performance-driven iteration, on-brand asset delivery.

### Staffing notes and availability

- Coverage model: Core team above plus flex support from GR0's creative and analytics pools for surges and specialized deliverables.
- Knowledge transfer: Weekly operating rhythm with KPI dashboards and decision logs to ensure continuity.
- Backups: Each lead has a named secondary to maintain SLAs during PTO or volume spikes.

Role / Name			Qualifications & Responsibilities		
Engagement Lead — Director, Client Activation: Sarah Magaña			11+ years leading client onboarding, growth strategy, and retention for D2C brands; Hermes Creative Awards Platinum. Responsibilities: executive alignment, growth roadmap, performance governance.		
Lifecycle Marketing Lead — Director, Email & SMS: Jordan Vanek			Builds retention programs across email/SMS; established GR0's Klaviyo Elite Partner practice. Responsibilities: lifecycle strategy, automation architecture, testing/analytics.		
Senior Email Campaign Manager: Zachary Witzig			Runs multi-brand lifecycle programs; strong retention. Responsibilities: calendar/cadence, segmentation, QA, reporting.		
Paid Media Lead — Senior Campaign Manager, Paid Media: Kira Terry			Full-funnel search/shopping/video with \$1M+/mo portfolio experience. Responsibilities: budget/pacing, optimization, testing roadmap.		
Paid Social Director: Jessica Muntz			Directs high-value social accounts across Meta/LinkedIn/TikTok. Responsibilities: creative testing at scale, escalation support.		
Senior Campaign Manager, Paid Social: Adam Witmer			Certified Meta/TikTok buyer; DTC growth marketer. Responsibilities: audience architecture, ad ops, KPI management.		
Client Success — Account Management: Ashley Wines			Enterprise stewardship; retention and delivery orchestration. Responsibilities: WBRs, roadmap sync, risk/issue management.		
Creative Director: Shaun Lewin			10+ years creative leadership. Responsibilities: creative brief, content roadmap, quality bar, performance insights.		
Senior Creative Producer: Justin Ercole			Emmy-recognized production; high-velocity ad ops. Responsibilities: UGC sourcing/direction, motion/video, rapid production.		
Name	Role	Core responsibilities	Relevant experience highlights	FTE allocation	Weekly cadence touchpoints
Sarah Magaña	Engagement Lead — Director, Client Activation	Executive alignment; program governance; success metrics; risk/issue escalation	11+ yrs leading growth programs; award-winning strategic marketing leadership	0.25 FTE in ramp, 0.15 FTE steady-state	Weekly executive sync; monthly QBR; ad-hoc decision reviews
Jordan Vanek	Lifecycle Marketing Lead — Director, Email & SMS	Lifecycle strategy; automation architecture;	Built Klaviyo Elite practice; deep retention and CRM expertise	0.20 FTE ramp, 0.15 FTE steady-state	Weekly channel planning; biweekly

\_\_\_\_\_

\_\_\_\_\_

upon request.



- **Creative**

- Alaskan King Crab Co.
- RDJ
- Dreamcars

- **Content Writing**

- Herbaly
- Powder

- **Paid Social**

- 4moms
- Lancer
- Skincare

- **Email Marketing**

- FCTRY Lab
- Circufiber

- **Google Ads**

- CoinTracker
- Pluto



- **Ritual** increased organic site traffic from **12,000 to over 200,000 monthly visitors**, ranking #3 on Google for ‘Prenatal Vegan Vitamins,’ while saving **over \$150,000 in ad spend** through GR0’s SEO framework.
- For **Bragg**, GR0 doubled email campaign revenue from **\$8,500 to \$18,500** and raised open rates from **41% to 50%**—proof that optimized lifecycle marketing translates into measurable awareness and engagement.
- **Kismet** achieved a **71% increase in revenue** with only an **11% increase in ad spend**, showing the effectiveness of GR0’s disciplined, performance-based creative strategy.

**Partnership Philosophy & Communication Approach:** Our success stories reflect measurable growth in awareness and participation across diverse audiences. Case studies consistently demonstrate lift in reach, engagement, and brand sentiment—proving our ability to translate marketing strategy into real-world impact for large-scale, mission-driven initiatives.

**Respondent shall identify all employees by name who will participate in this contract and the nature and scope of the duties and responsibilities of each such employee.**

Name	Title/Role	Nature and scope of duties
Sarah Magaña	Engagement lead (Director, Client Activation)	Lead the engagement; align strategy to OST goals; govern performance; chair WBR/QBR; manage risks/issues and approvals

Name	Title/Role	Nature and scope of duties
Ashley Wines	Client success (Account Management)	Program management; schedule and action tracking; stakeholder comms; SLA oversight; approval coordination
Jordan Vanek	Lifecycle marketing (Director, Email & SMS)	Lifecycle strategy/architecture; segmentation and cadence; testing plan; template build/QA; KPI reporting
Zachary Witzig	Email campaign manager (Senior CM)	Campaign build/deploy; calendar management; QA/deliverability; performance analysis; weekly/monthly reporting
Jessica Muntz	Paid social director	Paid-social strategy; creative testing framework; pacing/budget governance; escalation handling; quarterly optimization planning
Adam Witmer	Paid social (Senior CM)	Daily paid-social ops; audience/placement architecture; offer/creative iteration; KPI dashboarding; test implementation
Kira Terry	Paid media lead (Senior CM, Paid Media)	Search/YouTube/display strategy and execution; budget/pacing; experiment design; landing-page coordination
Shaun Lewin	Creative director	Creative briefs and content roadmap; concept and proof reviews; brand/accessibility/quality control; final sign-offs
Justin Ercole	Senior creative producer	Production of print/digital/motion assets; creator/vendor pipeline; file prep (press/web/social); on-time delivery

### **Engagement Lead** — Sarah Magaña, Director, Client Activation

Leads day-to-day engagement; aligns strategy with OST objectives; sets success metrics; chairs weekly business reviews; owns risk/issue escalation and quarterly business reviews.

### **Client Success** — Ashley Wines, Account Management

Owns program management and stakeholder communications; maintains schedule, action register, and decision log; coordinates approvals; ensures SLA adherence across workstreams.

### **Lifecycle Marketing** — Jordan Vanek, Director, Email & SMS

Owns lifecycle strategy and architecture (email/SMS); designs segmentation, cadence, and testing plans; oversees build/QA of email templates; reports on retention and engagement KPIs.

### **Email**

**Management** — Senior Campaign Builds and campaigns; calendars, QA, checks; performs analysis; and monthly

### **Paid Social** —

Paid Social Sets paid-social campaign team;



### **Campaign**

Zachary Witzig, Manager deploys email manages and deliverability performance produces weekly channel reports.

Jessica Muntz, Director strategy; mentors defines creative



testing frameworks; oversees pacing/budget governance; resolves escalations; contributes to quarterly optimization plans.

**Paid Social** — Adam Witmer, Senior Campaign Manager

Executes day-to-day paid-social operations; architects audiences and placements; iterates offers and creatives; maintains KPI dashboards; implements learnings from tests.

**Paid Media** (search/video/display) — Kira Terry, Senior Campaign Manager, Paid Media

Owns search, YouTube, and display strategy and execution; manages budgets and pacing; leads bid/creative experiments; coordinates landing-page requirements with creative and web teams.

**Creative Direction** — Shaun Lewin, Creative Director

Translates strategy into creative briefs; sets content roadmap; reviews concepts, proofs, and final files; enforces brand, accessibility, and quality standards across print and digital.

**Creative Production** — Justin Ercole, Senior Creative Producer

Produces campaign assets (print layouts, web/social graphics, short-form motion/UGC); manages creator/vendor pipeline; ensures on-time, press-ready, and channel-ready deliverables.

**Partnership Philosophy & Communication Approach:** To ensure the highest level of attention and performance, GR0 limits concurrent public-sector engagements. This selectivity guarantees dedicated leadership oversight and senior-level involvement throughout the duration of OST's program.

## Respondent's Organization And Credentials

**Proposals must include substantial evidence of the Respondent and its staffs' ability to undertake the services required and outlined in this RFP. Proposals must include the following:**

**Name of each staff member or subcontractor (if any) that the firm proposes to use in fulfilling its responsibilities.**

As of the date of this proposal, GR0 proposes to fulfill the contract using in-house staff only; no subcontractors are being used. If specialized services are later required, GR0 will request OST's prior written approval before engaging any subcontractor and will ensure all terms, confidentiality, and compliance requirements are met.

Name	Role
Sarah Magaña	Engagement lead — Director, Client Activation
Ashley Wines	Client success — Account Management
Jordan Vanek	Lifecycle marketing — Director, Email & SMS
Zachary Witzig	Senior Email Campaign Manager
Jessica Muntz	Paid Social Director
Adam Witmer	Senior Campaign Manager, Paid Social
Kira Terry	Senior Campaign Manager, Paid Media



Name	Role
Shaun Lewin	Creative Director
Justin Ercole	Senior Creative Producer

**The submission of detailed statements which cite the qualifications of the Respondent as a whole, as well as the qualifications of each participating staff member within the firm fulfilling their responsibilities hereunder.**

**Respondent (firm) qualifications**

- Integrated, in-house team spanning strategy, creative development/production, lifecycle (email/SMS), paid social, paid search/YouTube, and account management.
- Proven delivery of end-to-end communications programs: annual strategy and quarterly playbooks; multi-format marketing materials (print, digital, motion); owned and paid channel execution; and results evaluation with monthly/quarterly reporting.
- Experience serving brands with public-interest messaging, education/awareness objectives, and large-scale campaign governance.
- Mature operating rhythm: weekly business reviews, quarterly business reviews, decision and risk logs, version control, and accessibility/brand checks embedded in production.
- Tooling and partnerships: advanced email/lifecycle practice (Klaviyo/HubSpot), performance media across Google/YouTube and major social platforms, collaborative production workflows for print and digital.

Please see attached resumes for each team member listed below.

***GR0's Strength: Across industries, GR0 maintains high efficiency—achieving 7× ROAS for Agent Nateur and scaling growth without compromising spend discipline***

**Participating staff qualifications (matrix)**

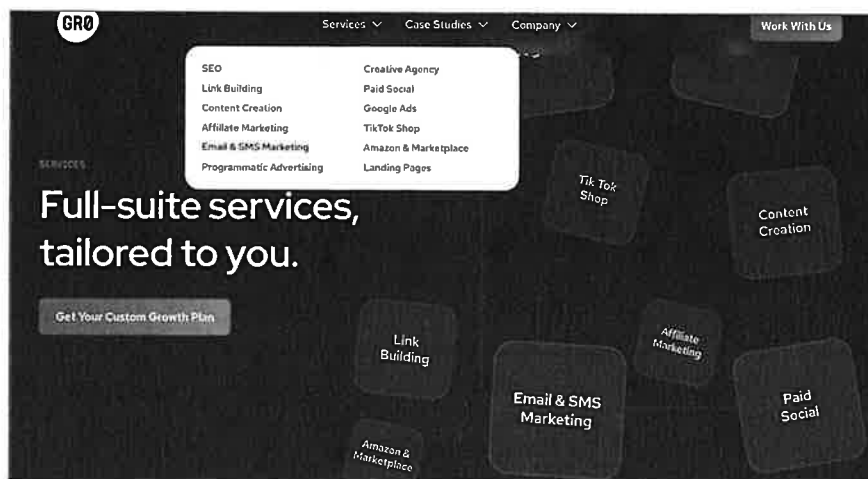
Name	Role (responsibility)	Years/experience summary	Core qualifications	Notable highlights
Sarah Magaña	Engagement lead — governs delivery, alignment, metrics, risk/issue escalation	11+ years leading growth and client programs	Executive alignment; program governance; KPI design; facilitation of WBR/QBR; cross-functional leadership	Award-recognized strategic marketing leadership; high retention across enterprise accounts
Ashley Wines	Client success — program management, approvals coordination, schedule/SLA control	Enterprise account stewardship	Stakeholder comms; action/decision logs; risk/issue tracking; vendor coordination; compliance packaging	Led complex multi-workstream schedules with on-time delivery
Jordan Vanek	Lifecycle marketing lead — email/SMS strategy and architecture	Advanced lifecycle practice leadership	Segmentation and cadence design; automation/journeys;	Built and led high-performing lifecycle

Name	Role (responsibility)	Years/experience summary	Core qualifications	Notable highlights
			A/B testing; deliverability and QA; KPI reporting	programs across multiple brands
Zachary Witzig	Senior email campaign manager — build/deploy, QA, performance reporting	Multi-brand lifecycle and campaign ops	Campaign calendar and production; QA and deliverability; analytics; weekly/monthly reporting	Consistent channel growth and client satisfaction across diverse portfolios
Jessica Muntz	Paid social director — strategy, testing frameworks, pacing/budget governance	Senior leadership in paid social	Cross-platform strategy (Meta/LinkedIn/TikTok); creative testing at scale; escalation handling; mentorship	Drives performance while maintaining governance and brand safety
Adam Witmer	Senior campaign manager, paid social — day-to-day operations	DTC and public-facing campaign execution	Audience architecture; placement mix; offer/creative iteration; KPI dashboards	Certified buyer experience; rapid test-and-learn cycles
Kira Terry	Senior campaign manager, paid media — search/YouTube/display	Managed large monthly budgets across platforms	Search and YouTube strategy; pacing/budget control; experiment design; landing-page collaboration	Stewardship of high-spend portfolios with measurable outcomes
Shaun Lewin	Creative director — briefs, content roadmap, quality/accessibility	10+ years creative leadership (agency/brand)	Creative direction; brand and accessibility standards; proof reviews; final sign-offs	Converts strategy into effective print/digital materials at scale
Justin Ercole	Senior creative producer — asset production (print/digital/motion/UGC)	High-velocity production across formats	Press-ready print; web/social graphics; short-form motion; creator/vendor pipeline	Delivers on-time, channel-ready assets; strong UGC and video chops

**Description of the experience of staff, including the number of years, in providing communications and marketing services. Experience in marketing financial services products or similar investments, while not required, should be clearly noted.**

GR0's proposed team brings deep, hands-on experience across strategy, creative, lifecycle/email, and paid media. Several team members have led high-spend campaigns and governed complex stakeholder programs.

- **Sarah Magaña** — 11+ years leading digital marketing and client activation across full-funnel programs.
- **Jordan Vanek** — 10+ years in lifecycle (email/SMS) leadership; department head at GR0.
- **Zachary Witzig** — 6+ years in lifecycle/email and multi-brand campaign ops (2019→present).
- **Kira Terry** — 7+ years in paid media/search/video (2018→present; \$1M+/mo portfolios).
- **Jessica Muntz** — 3+ years senior paid-social leadership across platforms; current GR0 Paid Social Director.
- **Ashley Wines** — 6+ years account management/program governance in multi-channel environments.
- **Shaun Lewin** — 10+ years creative leadership (content strategy, video/motion, production ops).
- **Justin Ercole** — 5+ years (and two Emmy awards) in creative production and campaign oversight.



### Financial-services / investment-adjacent experience

- **CoinTracker (crypto tax/finance)** — GR0's paid media work scaled profitable spend; supports finance/"investment-like" compliance and education. [gr0.com](https://gr0.com)
- **Pluto (digital wealth management)** — GR0's Google Ads reduced CPA ahead of a notable acquisition, demonstrating regulated-adjacent messaging expertise. [gr0.com+1](https://gr0.com+1)

If the Evaluation Committee prefers traditional banking/retirement examples, we can provide additional finance-adjacent case synopses to supplement or replace them.

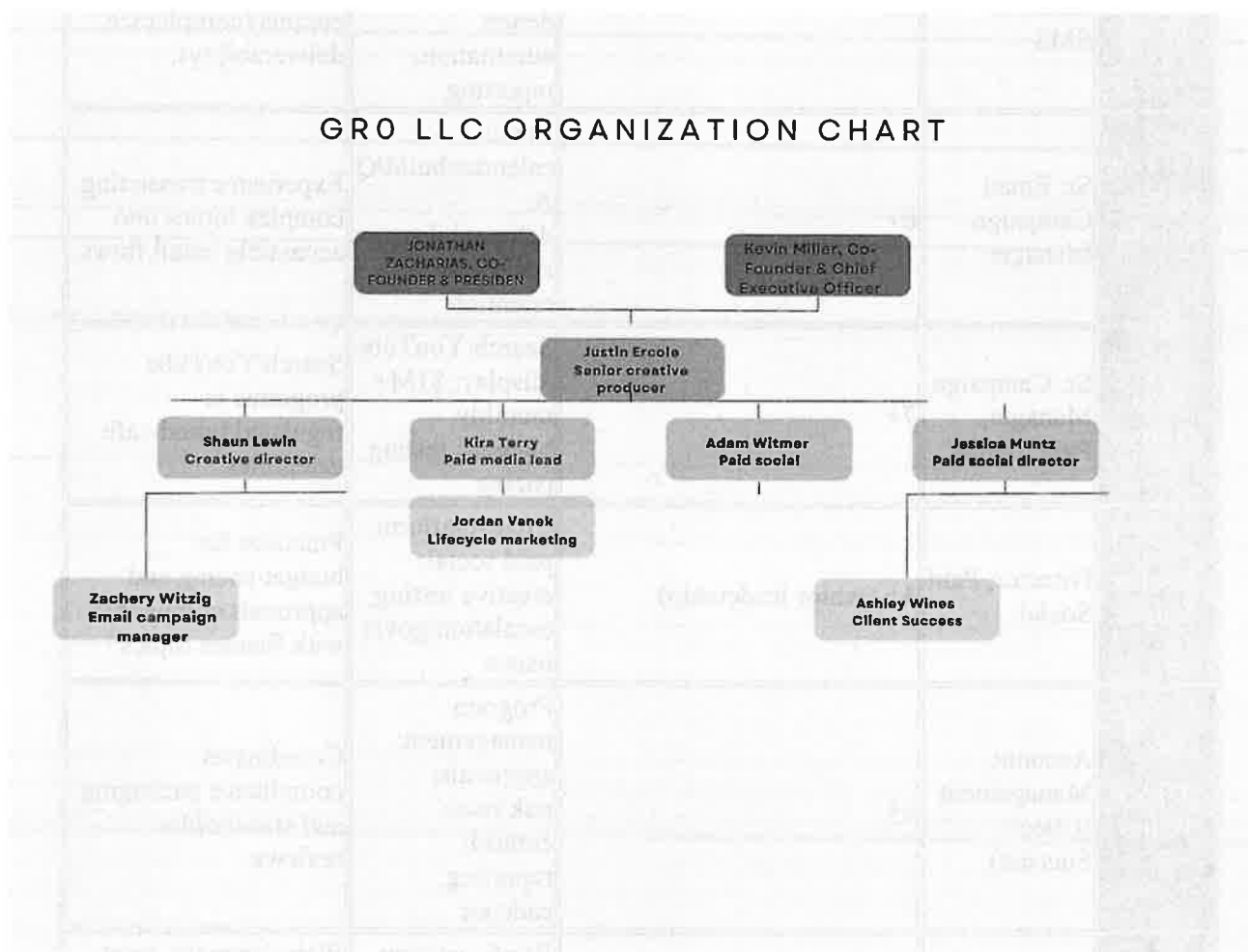
Name	Role	Years in communications/marketing	Focus areas (scope)	Financial-services/investments exposure
Sarah Magaña	Engagement Lead (Director, Client Activation)	11+	Full-funnel strategy; client activation; KPI/governance; cross-functional leadership	Oversees portfolios that include regulated/finance-adjacent brands.

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



**Partnership Philosophy & Communication Approach:** We believe in a partnership built on respect, responsiveness, and shared purpose. GR0 integrates seamlessly with client teams—maintaining open communication, weekly touchpoints, and a collaborative spirit that keeps creativity high and stress low.

**Organization chart of the firm and indicate the position of each of the above personnel.**



**Name of person(s) who will be assigned major roles in the fulfillment of the work obligations outlined under Section II and resumes for such should be provided.**

- Jonathan Zacharias, Co-Founder & President
- Kevin Miller, Co-Founder & Chief Executive Officer
- Sarah Magaña — Engagement Lead (Director, Client Activation)
- Ashley Wines — Client Success / Program Management
- Jordan Vanek — Lifecycle Marketing Lead (Director, Email & SMS)
- Zachary Witzig — Senior Email Campaign Manager
- Kira Terry — Senior Campaign Manager, Paid Media (search/YouTube/display)
- Jessica Muntz — Director, Paid Social



- Adam Witmer — Senior Campaign Manager, Paid Social
- Shaun Lewin — Creative Director
- Justin Ercole — Senior Creative Producer

Please see attached resumes for all key personnel mentioned above.

**Statement of the percentage of time that each person will be available to perform the work under the contract.**



("Ramp" = Month 0–1 setup; "Steady" = ongoing delivery. Percentages represent approximate FTE allocation.)

Name	Role	Ramp %	Steady %
Sarah Magaña	Engagement Lead	25%	15%
Ashley Wines	Client Success / Program Management	25%	20%
Jordan Vanek	Lifecycle Marketing Lead	20%	15%
Zachary Witzig	Senior Email Campaign Manager	30%	25%
Kira Terry	Sr. Campaign Manager, Paid Media	25%	20%
Jessica Muntz	Director, Paid Social	20%	10%
Adam Witmer	Sr. Campaign Manager, Paid Social	30%	25%
Shaun Lewin	Creative Director	20%	15%
Justin Ercole	Senior Creative Producer	30%	25%

**Statement of the willingness of the Respondent to provide adequate on-site support as needed.**

GR0 will provide adequate on-site support as needed. Core team members are available to travel for kickoff, stakeholder workshops, events, and critical reviews at the Agency's location in Jackson, Mississippi or other Agency-designated sites. Standard practice is to schedule on-site sessions during planning waves and major launches; ad-hoc visits can be accommodated with reasonable notice. All travel will be coordinated with the Agency in advance, and remote participation will remain fully available between visits to ensure continuity.

**Names of customers currently using similar skills, services, and products of the Respondent as identified in this RFP. The name of a contact person, title, address, and telephone number for each customer shall also be specified. OST reserves the right to contact each reference listed in the Respondent's proposal.**

#### Client References

**Client:** Lancer Skincare

**Address:** 440/400 N. Rodeo Drive, Beverly Hills, CA 90210



**Phone:** 1-310-278-8444

**Link:** <https://gr0.com/case-study/lancer>

**Client:** Herbaly

**Address:** Not listed

**EMail:** [info@herbaly.com](mailto:info@herbaly.com)

**Link:** <https://gr0.com/case-study/herbaly>

***Kismet – Conscious Parenting Brand Awareness***

**Client:** Kismet

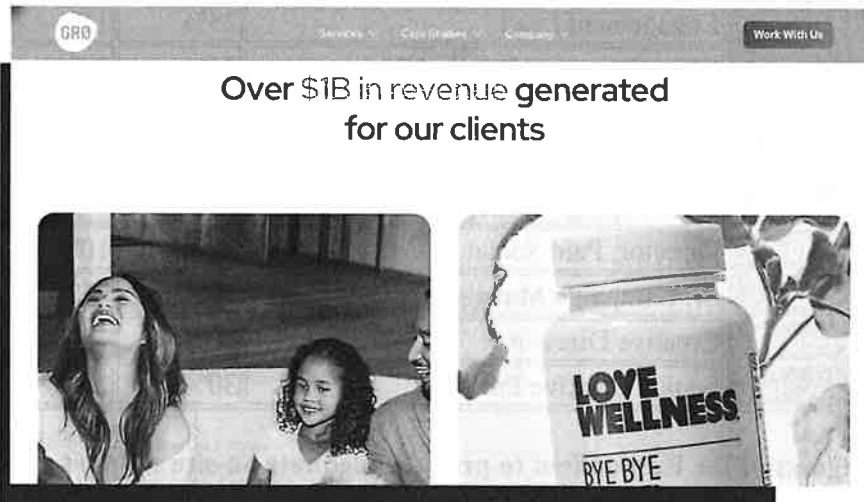
**Address:** Houston, TX 77471

**Phone:** 832-786-0450

**Link:** <https://gr0.com/case-study/kismet>



We help ambitious brands  
make big impressions.



**Certification that the Respondent is in compliance with all current contracts.**

GR0 LLC hereby certifies that it is in material compliance with all current contracts and purchase orders to which it is a party, and that no notices of default, cure, suspension, termination for cause, or other adverse actions are outstanding as of the date of this proposal.

Full certificate

Certification of Compliance with Current Contracts

I, the undersigned, duly authorized to bind GR0 LLC, certify that:

1. GR0 LLC is in material compliance with all current contracts and purchase orders to which it is a party;



2. GR0 LLC has not received any outstanding notice of default, cure, suspension, termination for cause, or debarment related to such contracts; and
3. GR0 LLC is not otherwise aware of any condition that would impair its ability to fully perform under existing agreements.

Exceptions:

- None

#### **Authorized Signatory**

Name: Jonathan Zacharias

Title: President

Company: GR0 LLC

Address: 12511 Beatrice St, Los Angeles, CA 90066

Email/Phone: jz@gr0.com (310) 386-3319

Signature: Jonathan Zacharias Date: 10/14/2025

#### **Use of Subcontractors**

**If the Respondent proposes to use one or more subcontractors, the proposal must identify the contemplated subcontractors and must include evidence of each subcontractor's ability to fill its respective duties.**

As of the proposal date, GR0 proposes to perform all services with in-house staff; no subcontractors are contemplated. If specialized services are later required, GR0 will request prior written approval from the Agency and provide evidence of each subcontractor's qualifications, scope, and compliance with all contract terms.

#### **Regulatory Restrictions And Litigation**

**Each Respondent must describe in detail any past or pending regulatory restrictions, consent orders, or litigation to which the Respondent's firm or any of its principals, owners, directors, or officers have ever been a party. Proposal must indicate if any principals, owners, directors, or officers have been convicted of a felony. If so, a detailed description of each incident must be included.**

To the best of our knowledge and after reasonable inquiry as of the proposal date:

- GR0 LLC has no past or pending regulatory restrictions or consent orders material to the services proposed herein.
- We are not a party to litigation that would impair our ability to perform under the contract.
- No principal, owner, director, or officer of the Respondent has been convicted of a felony.

If the Agency requests, GR0 will furnish a signed certification and, if applicable, detailed descriptions of any matters arising after submission up to the date of award.

#### **Economy Of Presentation**

**Each proposal shall be prepared simply and economically providing a straightforward, concise delineation of the Respondent's capabilities to satisfy the requirement of the RFP. Two or more firms may submit joint proposals to this RFP provided one firm is designated as the Respondent and the other firm(s) is designated as subcontractors to the Respondent.**



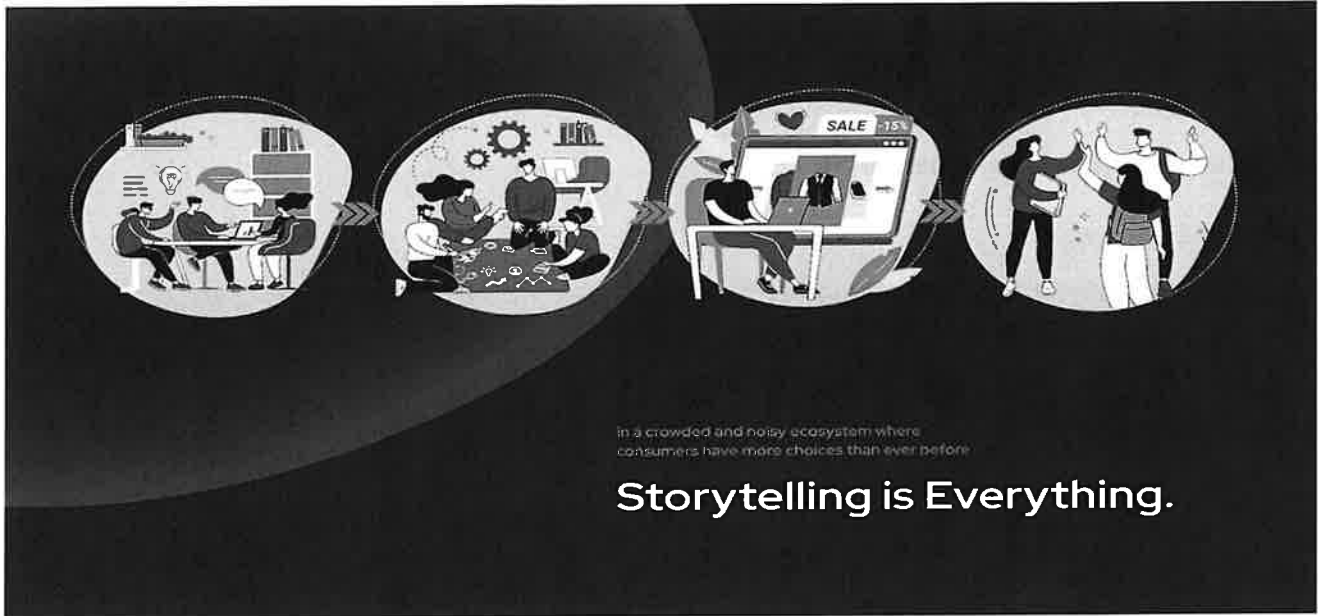
The proposal has been prepared to be straightforward and concise, focusing only on the information necessary to establish capability and compliance. GR0 understands joint proposals are permitted. Should the Agency pursue a joint approach, GR0 can serve as Respondent and designate approved firms as subcontractors, with clear scopes, points of contact, and single-point accountability to the Agency.

#### **Quality Management Practices (with Sample Reporting)**

- Governance: weekly business reviews and quarterly business reviews; RAID and decision logs maintained.
- Planning & approvals: written briefs, version control, approval history, and change control.
- Creative/production controls: concept and proof reviews; accessibility and brand compliance; preflight for print; digital QA for links/responsiveness.
- Channel controls: trafficking checklists; pacing/budget alerts; suppression/deliverability checks.
- Measurement: leading/lagging KPIs; monthly/quarterly reporting; improvement backlog.

Please see Appendix A below.

**Partnership Philosophy & Communication Approach:** Our process is built around sustained alignment with OST's mission to expand awareness and participation in financial and education programs. Through quarterly playbooks, monthly insights reports, and consistent messaging refinement, GR0 maintains a continuous cycle of learning and improvement that builds momentum year-round.



Thank you for the opportunity to submit this proposal. We are prepared to serve as the Agency's communications and marketing consultant and principal advisor—planning, producing, and measuring campaigns that reach Mississippians statewide with clarity and care. GR0's operating rhythm is simple: clear owners, named backups for continuity, transparent reporting, and steady improvement grounded in data and plain-language practice.



## 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"/>



## **SECTION II**

### **SCOPE OF SERVICES REQUESTED**

#### **2.1 REQUIRED SERVICES**

**This RFP contemplates that the Agency will contract with the successful Respondent to be the communications and marketing consultants for the OST and its Programs and the principal advisor and provider for the following specified services:**

Gr0 LLC acknowledges the above 2.1. Required Services.

##### **2.1.1 MARKETING STRATEGY**

**The Contractor shall be expected to assist the Agency in the development and implementation of annual and long-term marketing strategies and plans for executing those strategies.**

**OST staff would oversee the marketing of each Program. The proposed contractor would consult with staff in designing, planning, implementing, etc. Examples of efforts to distribute program information and marketing materials may include, but not be limited to:**

- A. Advertising through, radio and television.**
- B. Creation of commercial creative and production of spots.**
- C. Assist with Internet Marketing Campaigns.**
- D. Marketing to civic organizations and community events.**
- E. Marketing to employers in the state and promotion of college savings plans as an employee benefit.**
- F. Marketing to communities in the state to bring awareness of the Unclaimed Property program and help citizens find and claim their unclaimed property.**
- G. Display & booth set up at conventions, association meetings, fairs, etc.**
- H. Assist with updates to the Treasury website.**
- I. Public affairs and media relations for the Executive Office.**
- J. Assist with direct mailings to targeted groups**
- K. Assist with advertising through sports marketing entities.**

Gr0 LLC acknowledges the above 2.1.1. Marketing Strategy.





### **2.1.2 MARKETING MATERIALS DESIGN**

**The Contractor shall develop and create tag lines readily identified by the public for use by each Program. All marketing tag lines and slogans must be approved by the OST.**

**Contractor will design and assist OST staff in the production of printed marketing materials, which may include, but not be limited to, the following:**

**A. The Mississippi Prepaid Affordable College Tuition Enrollment Booklet. The booklet contains Program application, description, rules, disclosure and forms.**

**B. Single Sheet Flyers for distribution by Unclaimed Property and CSPM in a variety of outlets, conventions, emails, payroll deduction benefit fairs, magazines, newspapers, social media, etc.**

**C. Fold-Over brochures for distribution by Unclaimed Property and CSPM at conventions, banks, libraries, etc.**

**D. Posters and display stands advertising Unclaimed Property and CCSM.**

**E. Banners announcing Unclaimed Property and CSPM suitable for display at Fairs and Conventions, etc.**

**The OST staff may request production of the above listed materials be completed by the Respondent. However, OST staff reserves the right to produce materials by means of competitive written bids in accordance with Mississippi Code Annotated 31-7-13.**

Gr0 LLC acknowledges the above 2.1.2. Marketing Materials Design.

### **2.1.3 EVALUATION OF COMMUNICATION AND MARKETING RESULTS**

**At the conclusion CPSM enrollment period or Unclaimed Property event, the Contractor shall conduct awareness and buyer research as requested by OST to aid in developing subsequent strategies and campaigns.**

**The contractor shall provide oral and written reports on their work, suggestions or conclusions at such frequency as requested by the Agency or the State Treasurer.**

Gr0 LLC acknowledges the above 2.1.3. Evaluation of Communication and Marketing Results.

### **2.2 EXPERIENCE**

**A. Respondent must have at least five (5) years' experience in communications and marketing.**

Gr0 LLC acknowledges the above 2.2 Experience.

**Compliance & Integrity Disclosures**

- Certification of compliance with current contracts: Provided.
- No past or pending regulatory restrictions material to this work, to the best of knowledge at submission.
- No felony convictions among principals, owners, directors, or officers.

**Invoicing Interval & Ownership**

- Invoicing: in arrears, typically monthly.
- Ownership: all materials/data produced for the Agency will be owned by the Agency.

28 May 2025

# Zachary Witzig

Indianapolis, IN • +1 317-864-9785 • zach@witzigconsulting.com

## Enterprise Account Manager Summary

- I am a strong ecommerce marketing expert with the proven ability to provide best-in-class client experience, deliver exceptional communication, and dictate strategy to over 30 clients at one time.
- I excel at building and fostering strong relationships with my clients and have maintained an average 97% client retention and renewal rate over the last 36 months.

## WORK EXPERIENCE

### GR0 • Remote • 02/2024 – Present

#### Senior Email Campaign Manager • Full-time

- Manage the email marketing and lifecycle marketing efforts for a portfolio of 9 DTC and B2B brands that comprise \$50,000+ of monthly reoccurring revenue for GR0.
- Collaborate with brand stakeholders and internal creative teams to execute on campaigns that drive engagement, retention, and revenue.
- Responsible for client health and retention and have maintained a 95%+ retention rate in this role.

### Enterprise Account Manager

- Responsible for leading the strategy, communication, and management surrounding ongoing client campaign and digital marketing needs for a \$250,000 book of business (30+ ecommerce clients).
- Proactively provide strategic recommendations and growth-focused solutions to keep my managed book of business client churn below 3% every quarter.

### Amerisales.com • Indianapolis, IN • 05/2019 – 01/2024

#### Director of Client Success

- Responsible for all client facing communication and retention; ensuring that clients were renewing their contracts at or above a 90% rate.
- Lead a team of 4 account managers focused on driving revenue growth for clients via email lifecycle and retention marketing.

#### Director of Marketing

- Grew Amerisales from a Klaviyo Master Silver Partner to a Master Platinum Partner (Top 5% of 8000+ agencies) in under 11 months.

### Senior Paid Advertising Account Manager

- Implemented our Facebook Lead generation system into 104 different home service companies.

### Apple, Inc. • Indianapolis, IN • 06/2017 – 05/2018

#### Product Sales Specialist

## **EDUCATION**

### **Bachelor Of Science In Marketing and Business Administration**

Indiana Wesleyan University • 08/2013 - 04/2016

# JESSICA MUNTZ

jessmuntz@gmail.com

(901) 734-9147

Olive Branch, MS, 38654

## EDUCATION

### MISSISSIPPI STATE UNIVERSITY

Mississippi State, MS

Bachelor of Arts (B.A.) Communication

## SYSTEMS/SOFTWARE

Facebook  
Instagram  
Pinterest  
TikTok  
Google Analytics  
Looker Studio  
Salesforce  
SoCi  
Monday  
Smartsheet  
Motion  
Icon  
Foreplay  
Click Up  
Microsoft Office

## CERTIFICATIONS & PRESENTATIONS

**Triple Whale Webinar:** How Smart Beauty & Wellness Brands Scale Acquisition Profitably, May 2025  
TikTok Media Buying Certification

### DIRECTOR, PAID SOCIAL

GR0 (Remote)

Jan 2025 – Present

- Lead strategic discussions for paid social campaigns, shaping strategies across platforms such as Meta, LinkedIn, and TikTok to achieve impactful results.
- Oversee high-value accounts with budgets of \$75,000–\$100,000 in Monthly Recurring Revenue (MRR) across 4–6 accounts, ensuring alignment with client KPIs.
- Maintain a healthy P&L based on Gr0's operating plan and Paid Social's contribution to that plan.
- Manage and optimize multi-platform campaigns, leveraging attribution tools and advanced insights to enhance audience segmentation and creative performance.
- Mentor and develop team members, driving performance and fostering a culture of continuous learning and collaboration.
- Resolve escalations related to campaign performance, budget adjustments, or strategic shifts independently while maintaining client trust and satisfaction.
- Direct operational strategies, ensuring seamless execution of workflows and alignment with broader business objectives.
- Drive growth by identifying upsell opportunities, delivering strategic pitches, and fostering long-term client relationships.
- Lead agency innovation by introducing new tools, strategies, and practices to maintain a competitive edge in the paid social landscape.
- Monitor industry trends, integrate emerging best practices, and guide creative strategies to align ad visuals and messaging with campaign goals.
- Develop and implement retention strategies to reduce churn, proactively addressing client risks and maintaining strong satisfaction scores.
- Negotiate and manage contracts for paid social services, ensuring favorable terms.

### SENIOR CAMPAIGN MANAGER, PAID SOCIAL

GR0 (Remote)

July 2024 – January 2025

- Manage paid ads on social media for 10–15 client accounts with monthly budgets ranging between \$50,000–\$500,000+/month per client.
- Responsible for onboarding new clients and learning their brand messaging inside and out.

- Touch base with clients on a regular basis and host weekly client calls.
- Optimize client campaigns using unique, creative strategies and concepts.
- Ideate, script and storyboard creative concepts for new ads.

## **DIRECTOR, PAID SOCIAL**

*Didit LLC (Remote)*

*December 2022 – May 2024*

- Develop, implement, and optimize advanced paid social media strategies on various platforms including Meta, Instagram, TikTok, Pinterest, and LinkedIn
- Create forecasts and recommendations for media spend with projected CACs
- Develop monthly reporting decks to showcase paid performance along with making proactive recommendations to drive stronger performance the following month
- Present and sell strategies/plans to clients
- Draft creative briefs and develop compelling ad copy for target audiences
- Manage day-to-day flow of social media performance, including pacing, monitoring KPIs, and troubleshooting within respective self-service ad platforms
- Analyze and distill performance data into actionable plans to improve campaign effectiveness
- Identify and define target audience segments using demographic, psychographic, and behavioral data  
Identify effective and innovative social media advertising strategies that deliver results
- Work closely with the content, creative, and marketing teams to ensure cohesive messaging and branding across all channels
- Manage client expectations and provide exceptional customer service to build long-term relationships.

## **SENIOR MARKETING MANAGER**

*NP Digital (Remote)*

*June 2022 – November 2022*

- Deliver B2B paid social media strategy and recommendations for clients
- Communicate directly with multiple partners to report on results, define priorities, and manage expectations, acting as the expert that will help partners grow their businesses
- Project estimated campaign performance results based on client budgets and benchmark costs and rates
- Develop & implement paid social campaign structures to manage and optimize against performance goals such as CPL, sales, or LTV
- Steward clients' budgets through meticulous management of daily or lifetime spending and monthly, quarterly, or annual pacing
- Improve campaign performance by making optimization recommendations and using paid social campaign management checklist to identify opportunities
- Analyze and resolve diverse and complex issues based on in-depth knowledge of paid social platforms

# Shaun Lewin

## *Creative Director | Brand Storytelling & Content Leadership*

---

Tucson, Arizona, United States • [shaunlewin@gmail.com](mailto:shaunlewin@gmail.com) •  
[www.linkedin.com/in/shaun-lewin-86967554](http://www.linkedin.com/in/shaun-lewin-86967554)

Creative leader with over a decade of experience in content strategy, video production, and team development for top agencies and brands. Delivers innovative campaign solutions by uniting storytelling expertise and operational rigor to drive measurable results.

### **PROFESSIONAL EXPERIENCE**

#### **Creative Director | GR0 | Los Angeles, California, United States**

*Feb 2024–June 2025*

- Shapes creative vision and strategy across all brand channels, ensuring cohesive and high-impact messaging.
- Mentors and manages a diverse team of creators, providing both strategic guidance and hands-on support to achieve ambitious deliverables.
- Oversees end-to-end production workflows, from ideation through post-production, balancing creative quality with deadlines and budget requirements.
- Collaborates closely with client stakeholders and internal partners to refine creative briefs, ensuring alignment with evolving marketing goals.
- Implements data-driven solutions to maximize campaign effectiveness and audience engagement.

#### **Head of Creative Content | MuteSix | Los Angeles, California, United States**

*Sep 2021–February 2024*

- Directed content planning and execution for a diverse portfolio of DTC and enterprise clients, consistently boosting engagement and conversion metrics.
- Built and coached a cross-functional team of writers, editors, and producers, introducing streamlined processes that improved output efficiency by over 20%.
- Crafted narrative frameworks and creative assets tailored to different platforms, enhancing brand presence and voice.
- Harmonized feedback from marketing, design, and analytics teams to iterate campaigns for optimal performance.
- Analyzed content effectiveness, offering actionable insights to elevate future projects and team capabilities.

#### **Lead Content Producer | MuteSix | Los Angeles, California, United States**

*Mar 2020–February 2024*

- Directed multi-channel content campaigns, balancing storytelling innovation with data-driven decision making to achieve client KPIs.
- Orchestrated all stages of video production, from concept development through editing, ensuring alignment with brand tone and objectives.
- Guided teams on best practices in pre-production planning, creative ideation, and post-production review.
- Facilitated smooth collaboration between creative, technical, and account teams to deliver scalable content solutions.
- Piloted workflow enhancements that reduced turnaround times and increased campaign output.

#### **Creative Strategist / Producer / Director | TubeScience | Greater Los Angeles Area**

*Jun 2017–December 2019*

- Developed and produced high-converting video ads by analyzing market trends and user insights.
- Collaborated with performance marketing teams to refine creative approach based on campaign data.
- Led brainstorming sessions, transforming raw concepts into compelling creative treatments.
- Managed on-set production and direction, ensuring quality standards and project timelines were met.
- Contributed to client growth by delivering insightful post-campaign reviews and optimization strategies.

#### **Associate Producer / Production Coordinator, Epic Rap Battles of History | Maker Studios Inc | Culver City, CA**

*Jan 2016–January 2017*

- Supervised logistics and scheduling for high-volume shoots, effectively coordinating teams and resources.
- Oversaw content approvals and quality control, ensuring consistency with brand and creative vision.
- Worked directly with talent, vendors, and crew to support seamless productions.
- Documented and reported on project progress, facilitating transparent communication with senior producers.
- Researched and procured necessary equipment and locations within budgetary constraints.

## **Production Assistant, Epic Rap Battles of History | Maker Studios Inc | Culver City, CA**

*Jan 2013–January 2016*

- Supported all aspects of day-to-day set operations, maintaining a proactive approach to troubleshooting.
- Assisted in prop and set management, contributing to efficient shoot execution.
- Ensured logistical needs were met for cast and crew during production days.
- Organized and maintained production inventory, streamlining asset availability.

## **Mail Room Supervisor | CorrectiveSolutions | San Clemente, CA**

*Dec 2007–December 2012*

- Oversaw a high-volume mail room operation, addressing workflow bottlenecks and improving service delivery.
- Implemented inventory tracking systems, reducing material loss and optimizing supply orders.
- Developed training materials and onboarded new personnel, enhancing team reliability and morale.
- Maintained rigorous records and compliance with data handling protocols.

## **SKILLS**

Creative Direction  
Content Strategy  
Team Leadership  
Video Production

Storytelling  
Cross-functional Collaboration  
Brand Development  
Content Optimization

Project Management  
Visual Design  
Digital Media  
Client Relations

## **Reference:**

Stacey Norgren  
Creative Director: Fabletics  
staceynorgren@gmail.com



## SUMMARY

Account Manager with a strong background in managing enterprise-level accounts and nearly \$2M in monthly ad spend. Skilled in strategic planning, cross-functional collaboration, and performance optimization. Proven ability to build trusted client relationships, drive retention, and identify growth opportunities across diverse verticals. Brings a results-driven, relationship-first approach to every client engagement.

## SKILLS

- Strong problem-solving
- Workflow Optimization
- Collaboration
- Critical thinking
- Analytical skills
- Google Suite
- Asana Project Management
- Internal/External Team Communication

## WORK EXPERIENCE

### GRO

Account Manager • October 2024 - Present

- Own strategic relationships with enterprise clients across multiple verticals.
- Serve as the primary point of contact, driving alignment between client business objectives and internal execution teams.
- Lead weekly performance meetings, proactively surfacing insights and strategic opportunities to drive performance and deepen partnerships.
- Collaborate cross-functionally to ensure campaigns are launched on time, meet performance goals, and adapt to shifting priorities or budgets.
- Develop and maintain internal documentation, reporting frameworks, and communication cadences to ensure transparency and consistency across teams.
- Support revenue growth by identifying upsell opportunities, expanding channel mix, and improving client satisfaction and retention.

### MuteSix

Client Success Manager • April 2023 - October 2024

- Foster strong client relationships through regular communication and client-facing interactions, addressing concerns, and ensuring client satisfaction.
- Assist in onboarding new clients, providing support to account teams, and aligning marketing strategies with client expectations.
- Work closely with Data and Reporting Analysts, and Campaign Managers to streamline day-to-day project tracking and management through Asana and Slack.
- Contribute to ongoing process improvement initiatives across the campaign team, enhancing workflow efficiency and client service delivery.
- Identify opportunities for upselling additional marketing channels, ensuring clients receive a comprehensive and integrated marketing strategy by collaborating with the Growth Strategy Team.

### Adentro

Campaign Manager • August 2019 - February 2023

- Managed an enterprise-level book of business achieving a consistent month-over-month growth rate of 10% and less than 6% churn rate.
- Pulled and analyzed media pacing reports, evaluating performance against key performance indicators (KPIs) for Social, Programmatic, and Display Campaigns.
- Achieved a remarkable 4x return on ad spend across various paid channels through meticulous campaign optimization.
- Determined target audiences for brands and strategically optimized campaigns for maximum return on investment (ROI).
- Crafted compelling proposals for diverse platforms, including Social, Display, TikTok, and CTV, demonstrating a nuanced understanding of client requirements.
- Collaborated with clients to develop engaging copy and creative assets aligning with their business models.

# ASHLEY WINES

ACCOUNT MANAGER

505.688.8639

ashleynwines@icloud.com

## CONTINUED WORK EXPERIENCE

### Yelp

Revenue Operations Specialist • September 2017–August 2019

- Established new advertising accounts and effectively managed top Key Performance Indicators (KPIs) within the operations department.
- Orchestrated Salesforce account management to streamline processes and enhance operational efficiency.
- Conducted thorough vetting of site listings and deals to ensure compliance with established policies and standards.
- Played a pivotal role in unlocking revenue by imparting comprehensive knowledge and solutions to Yelp sales associates, empowering them to navigate all functions of the Yelp website and enhance user and owner experiences.

## REFERENCES

### Chelsea Nisbet

Vice President of Customer Success, Adentro  
chelsearnisbet@gmail.com

### Candice Chambers

Manager, Account Management, Fieldwire by Hilti  
candicemchambers81@gmail.com

# Jordan Vanek

---

Portland, Oregon Metropolitan Area · jordan.vanek@gr0.com

LinkedIn: <https://www.linkedin.com/in/jordan-erickson-72423866/>

## Professional Summary

Accomplished digital marketing leader with 10+ years of expertise in lifecycle marketing, known for driving eCommerce growth through high-impact email, SMS, PPC, and content strategies. Former founder of a successful digital agency, blending strategic vision with hands-on execution to deliver measurable ROI for small and mid-sized businesses. Currently spearheading lifecycle marketing at GR0, where I lead email and SMS efforts to boost retention and maximize customer lifetime value through data-driven, creative campaigns. Under my leadership, the department earned Klaviyo Elite Partner status—placing us in the top 0.2% of agencies—and became a certified HubSpot partner, further solidifying our commitment to performance and platform expertise.

## Key Skills

- Lifecycle Marketing Strategy
- Email & SMS Marketing (Klaviyo, Postscript, Hubspot, Attentive)
- eCommerce Growth & Retention
- Digital Campaign Optimization
- Marketing Automation
- Customer Loyalty Programs
- Paid Media (PPC) & Content Strategy
- Leadership & Team Management
- CRM and Data Analytics

## Professional Experience

### GR0 — Director of Email & SMS

May 2023 – Present

- Lead lifecycle marketing efforts across GR0's client portfolio, with a focus on maximizing ROI through personalized email and SMS strategies.
- Collaborate with brand stakeholders and internal creative/technical teams to execute campaigns that drive engagement, retention, and revenue.

## **Refine Digital Marketing — Founder & Owner**

Oct 2015 – May 2023 | Portland, OR

- Founded and managed a boutique agency serving small to mid-sized eCommerce businesses.
- Delivered comprehensive marketing services including email, PPC, social media, and content marketing.
- Achieved exceptional client growth through efficient, cost-effective strategies tailored to each brand.
- Supervised creative production and analytics to refine campaigns and improve performance continuously.

## **Omblogo, Inc. — Digital Marketing Strategist**

Feb 2015 – Oct 2015 | Brooklyn, NY

- Transitioned from data analysis to digital strategy role, spearheading the launch of the company's eCommerce site, TechMikeNY.com.
- Conducted market research and pricing strategy under CFO supervision.
- Managed full-cycle digital marketing planning and execution for the company's eCommerce site including PPC, email marketing, and SEO.

## **Design Corp, Inc. — Marketing Manager**

Jun 2013 – Jan 2015 | Brooklyn, NY

- Managed sales and teaching staff, led marketing operations, inventory planning, and event coordination.
- Increased average order value from \$21 to \$58 in three months.
- Developed and executed branding and promotional strategies that improved customer engagement and retention.

## **Education**

### **Baruch College**

Bachelor of Business Administration (BBA), Marketing — 2012–2015

## **Certifications & Volunteering**


Delivery Volunteer, The Children's Book Bank — Nov 2015 – Present

Dog Foster, One Tail at a Time PDX + Columbia Humane Society — March 2020 – Present

# Sarah Magaña

---

Los Angeles Metropolitan Area

 LinkedIn: [linkedin.com/in/sarahjanemagana](https://www.linkedin.com/in/sarahjanemagana)

## Professional Summary

Award-winning Digital Marketing Leader with over 11 years of experience in driving growth for D2C and eCommerce brands. Proven expertise in SEO, client activation, and full-funnel marketing strategy. Recognized for mentoring high-performing teams, enhancing client satisfaction, and improving retention through operational efficiency and innovative strategy execution. Adept at managing multimillion-dollar portfolios and scaling digital campaigns that maximize ROI.

## Key Skills

Digital Marketing Strategy, SEO (Search Engine Optimization), Client Activation & Retention, Leadership & Team Development, Project Management, Performance Analysis, Communication & Stakeholder Management, Social Media Strategy, B2B and B2C Campaigns

## Professional Experience

**GR0 — Los Angeles, CA**

**Director, Client Activation**

Dec 2024 – Present

- Leading client onboarding and success strategy to maximize D2C growth across the marketing funnel.
- Leverage in platform data and advanced analytics tools to develop and execute comprehensive marketing strategies for enterprise level clients
- Collaborate closely with multiple teams to drive growth for clients

**Associate Director, Client Activation**

Feb 2024 – Dec 2024

- Increased marketing efficiency by 21% YoY for a luxury apparel client
- Reduced C2C client's YoY revenue gap by 15% from September to October
- Managed strategic planning and performance optimization for client accounts.
- Championed cross-functional collaboration to improve delivery timelines and service quality.

**Associate Director, SEO**

Sep 2022 – Feb 2024

- Oversaw SEO campaigns focused on growth and retention.
- Received the 2023 Hermes Creative Awards Platinum Winner for Strategic Marketing Excellence.

**ProSites — Temecula, CA**

**Senior Digital Account Manager**

Aug 2020 – May 2021

- Directed high-profile digital campaigns, serving as the primary point of contact and marketing consultant.

**Digital Account Manager**

Jun 2019 – Aug 2020

- Built client trust by providing transparent performance insights and strategic marketing recommendations.

**Website and Social Media Onboarding Specialist**

Oct 2018 – Jun 2019

- Facilitated onboarding processes and trained clients on website and social media tools.

**OPEN USA (formerly NexusB4T) — Remote**

**Social Media Coordinator**

Oct 2015 – Jan 2018

- Executed targeted campaigns across major social platforms including Facebook and Twitter.

## **Education**

**California Baptist University**

Bachelor of Arts in English, Concentration in Creative Writing

2013 – 2015

GPA: 3.62 | Graduated Cum Laude

Member of Sigma Tau Delta Honor Society

Published in the university's literary journal

**Mt. San Jacinto College**

Associate Studies in English

2009 – 2012

Member of Phi Theta Kappa Honor Society

# Adam Witmer

---

Indianapolis, Indiana, United States

LinkedIn: [linkedin.com/in/adamjwitmer](https://www.linkedin.com/in/adamjwitmer)

## Professional Summary

Results-oriented digital marketing professional with extensive experience in paid social, growth marketing, and campaign strategy. Proven ability to drive revenue through innovative campaign execution, data-driven optimization, and cross-functional collaboration. Strong track record in managing full-funnel strategies for B2C and D2C brands. Known for initiative, creativity, and a passion for performance marketing.

## Key Skills

Paid Social Campaign Management, Campaign Strategy Development, Channel Account Management, Growth Marketing, Client Communication, Digital Advertising, Meta & TikTok Media Buying, Team Collaboration, Marketing Analytics

## Professional Experience

- GRO
  - Senior Campaign Manager, Paid Social
  - Jan 2025 – Present
  - Lead strategic planning and execution of paid social campaigns for DTC brands.
- Primer (Sendbridge, Inc)
  - Senior Growth Marketing Manager
  - Jun 2021 – May 2024
  - Directed high-performance marketing campaigns with focus on scaling revenue growth.
  - Managed strategic development and optimization of omnichannel campaigns.
- Lendly, LLC — Dayton, OH
  - Marketing Coordinator
  - Jan 2019 – Jun 2021
  - Coordinated campaign execution and analyzed marketing performance data.

## **Education**

- **Miami University**
  - Bachelor of Arts in Professional Writing
  - 2014 – 2018

## **Certifications**

- TikTok Media Buying Certification Exam – TikTok for Business, Issued Mar 2025 (Valid through Mar 2027)
- Facebook Certified Media Buying Professional – Meta, Issued Jan 2020

## **References**

- **Dawn Wild**
  - Senior Director of Growth Marketing at Primer (Sendbridge, Inc)
  - Relationship: Previous Manager at Primer
  - <https://www.linkedin.com/in/dawnwild/>
  - [dawn@goprimer.com](mailto:dawn@goprimer.com)
- **Julien Malet**
  - Senior Director at The Quality Edit
  - Relationship: Previous Manager at Primer
  - [www.linkedin.com/in/julienmalet](https://www.linkedin.com/in/julienmalet)



# Kira Terry

28 May 2025

Springville, Utah  
84663  
T: 801.368.4843  
E: kira.a.terry@gmail.com

## EXPERIENCE

### **GRO, Remote — Senior Campaign Manager, Paid Media**

April 2024 - PRESENT

- Strategically manage ecommerce & lead gen paid media campaigns across multiple digital platforms for B2C & B2B clients.
- Develop and execute cross-channel media strategies tailored to client objectives, business size, industry, and budget.
- Lead strategic performance reviews with clients, providing data-driven insights and actionable optimizations.
- Mentor junior team members and provide strategic input across broader digital marketing efforts.

### **MuteSix, Remote — Senior Paid Media Campaign Manager**

August 2021 - April 2024

- Managed over \$1 Million monthly in media spend across Google, Microsoft & Meta Ads. Responsible for client's day-to-day channel management, optimization, strategy & testing.

### **Blue Fire Leads, Provo, Utah — Account Manager, Digital Marketing Strategist**

August 2020 - August 2021

- Managed lead-gen digital marketing campaigns for a variety of clients in the Solar & Home Energy space. Handled company marketing Strategy for Google Search, Display, Discovery & Microsoft Ads.

### **ThriveHive, Remote — Paid Media Strategic Accounts Campaign Manager**

Feb 2018 - July 2020

- Created, managed and optimized high-spend digital marketing campaigns. Fulfilled search, social, display and video ads to generate leads for top Enterprise clients.

### **Las Vegas Review-Journal, Las Vegas, NV — Sports Digital Producer & Online Producer**

February 2014 - February 2018

- Edited, produced & posted content for the Sports Department & Newsroom. Enhanced daily content for the publication's digital platform. Managed the department's social media platforms. Assisted reporters with live reporting, video producing, social media & editing.

### **Education: Utah Valley University, Orem, UT — Studied Communications with an emphasis in Journalism**

January 2008 - August 2011

## SKILLS

Google and Microsoft Ads, Meta, TikTok, Snapchat, Display & Programmatic, Native, YouTube, Connected TV, Email Marketing & Reddit Ads.

Motivated, dedicated, detail organized & efficient. Resourceful & goal driven team player.

Exceptional and effective communication skills both in writing and verbally.

Computer-literate with knowledge of a variety of software, applications & operating systems.

Expert in digital media, social media, basic HTML, Wordpress & web publishing.

Graphic design, video editing & photo editing.

## CERTIFICATIONS

Google Ads, Microsoft Ads, Meta Ads, Google Analytics, YouTube, Programmatic & Display, Reddit Ads

**PROFESSIONAL REFERENCE**  
Nate Miller: (925) 337-9371  
natemillerads@gmail.com

28 May 2025

# JUSTIN ERCOLE

Creative producer skilled in crafting high-impact content that drives engagement.

## CREATIVE AGENCY PRODUCING EXPERIENCE

### 2024–Current | Gr0 Agency – SR Creative Producer

- Led the creation of high-impact content and performance ads, utilizing data-driven insights to optimize creative strategies and maximize client ROI.
- Collaborated with cross-functional teams, including designers and marketing, to produce cohesive video, motion graphic and static image assets that align with brand values.
- Managed the onboarding of UGC creators and maintained relationships to ensure effective collaboration in content production.
- Analyzed creative test results to inform strategic recommendations and iterate on content for continuous improvement.
- Developed and implemented production budgets, achieving a 40% profit margin while maintaining project timelines and quality.
- Mentored junior team members, sharing best practices and industry trends to enhance overall creative output.
- Managed P&L for the department, led the restructuring of standard operating procedures, and developed clear contractual language that drove growth and operational efficiency.

### 2024 | Prager U – Supervising Producer

- Planned and managed comprehensive AV production workflows, ensuring alignment with strategic goals and timely execution.
- Oversaw budget management, optimizing resources to maintain production schedules and achieve high-quality outcomes.
- Hired and directed crew members, delegating tasks to various departments to meet project objectives effectively.
- Collaborated with physical and post-production teams to deliver content that meets client needs and brand image while enhancing audience engagement.

### 2023 | Abbson (agency) – Executive Producer

- Managed all administrative logistics for physical production, ensuring seamless coordination across teams.
- Oversaw crew onboarding and sourced local vendors, enhancing operational efficiency and project execution.
- Acted as a liaison between production, marketing, and post-production departments to ensure cohesive communication and alignment.
- Coordinated casting and recording activities, effectively managing the creation of high-quality media content.
- Developed and implemented production budgets, achieving a 40% profit margin while maintaining project integrity.
- Tracked progress of series across internal teams, ensuring timely delivery and adherence to production schedules.
- Created and managed workback schedules and production timelines, optimizing workflow and resource allocation.
- Organized media and built stringouts for the editing team, facilitating smooth post-production processes.
- Engaged directly with talent, conducting interviews and operating

## CONTACT

C: (973)349-4561

E: Justin.Ercole@gmail.com

## EDUCATION

Bucknell University, Lewisburg, PA

## SKILLS

**Owned equipment:** Sony FX6, 24-105mm Lens, RODE Wireless PRO

**Programs:** Ads Manager, MotionApp, Foreplay, Whatagraph, Descript, CapCut, Showbiz Budgeting, Adobe Premiere, Avid, iNews, PilotWare, Final Draft, Final Cut X, Microsoft Office, Offshoot

**Technical:** Budgeting, Interviewing, field notes, VO's, scripting, cue cards, leading multi-camera crews, production timelines, call sheets, DIT

## REFERENCES

(additional available upon request)

### SHAUN LEWIN

Gr0 Agency, Director of Creative

E: Shaun.Lewin@Gr0.com

### ANTON SEIM

PragerU, Creative Director

E: AntonSeim@gmail.com

### HUNTER JOHNSON

CEO of Xpedition

E: Hunter@Xpedition.co

## AWARDS

2018 Daytime Emmy Award

"The Talk"- Outstanding Talk Show

2016 Daytime Emmy Award

"The Talk"- Outstanding Talk Show

camera equipment to capture compelling content.

### **2021-2023 | Xpedition (agency) - Producer For "Fitbit"**

- Produced and directed over 300 fitness segments in six languages, enhancing brand engagement for a leading tech client.
- Developed innovative, high-impact content ideas aligned with brand values, driving member acquisition and engagement.
- Collaborated with cross-functional teams, including content post-production, creative agencies, and localization partners, to ensure seamless execution and timely delivery of projects.
- Managed end-to-end content workflows, ensuring all deliverables were on-brand, within budget, and met tight timelines.
- Oversaw casting and physical production development, providing creative direction and ensuring high-quality visual assets.
- Hired, trained, and led team members, fostering a collaborative environment to drive project success.
- Assisted in social marketing efforts,

### **TELEVISION PRODUCING EXPERIENCE**

#### **2021 | Untitled Netflix Prank Show - Producer (field/post)**

- Supervised logistical preparation for field shoots including casting, releases, & permitting
- Built production schedules to meet aggressive timelines
- Communicated across multiple departments to facilitate a smooth workflow in the field to achieve maximum results
- Assisted in creative ideation of episode storylines

#### **2021 | Shark Week w/ Brad Paisley - Field & Story Producer**

- Developed script for episode featuring Brad Paisley & J.B Smoove
- Directed crew on international shoot in the Bahamas
- Aided in research, scheduling & casting
- Managed departments, shot lists & releases in field

#### **2019- 2020 | Battlebots (Season 4 & 5)- Field & Story Producer**

- Interviewed cast members on camera in "the pit" to aid storyline & cover important story beats
- Conducted research on teams & built production bible for new hires
- Responsible for talent relations extending beyond production in-between seasons

#### **2020 | Crime Tech (Season 1)- Field & Story Producer**

- Coordinated logistics for pre and physical production
- Responsible for building roster of on camera talent & conducting pre-interviews
- Managed call sheets and onboarding team members

#### **2019 | Guitar Hunters (Season 1)- Field & Story Producer**

- Managed all logistics for pre and physical production
- Responsible for building roster of on camera talent
- Traveled on-the-road for 2 months directing & filming content
- Managed call sheets, releases, permitting, travel
- Handled all expenses including invoices, reimbursements, etc.

#### **2019 | Celebrity Big Brother (Season 2)- Field & Story Editor**

- Worked 12-15 hour night shift in control room monitoring camera feeds for A and B storylines
- Typed string outs of selected story beats for morning team



## APPENDIX A PRICING SCHEDULE

Fill out the below table with the service and the proposed price. Include the unit for price (per hour, percentage above cost, etc)

SERVICE	PROPOSED PRICE
Program & Project Leadership	\$130 per hour
Creative Development & Design	\$120 per hour
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 \$200k)
Community Mailer	\$1.50 each
Digital Display Ad Set	\$950 per set
Poster	\$8.50 each
Banner	\$43 each
Video Spot (30 sec)	\$3400 each
Radio Spot	\$850 each
Email Template	\$275 each



**APPENDIX B**  
**Office of the State Treasurer**

**Request for Proposals - Communications and Marketing Consultants**

**OFFEROR'S REPRESENTATION REGARDING CONTINGENT FEES**

By responding to the solicitation the offeror represents that it has not retained any person or agency on a percentage, commission, or other contingent arrangement to secure this contract. If the offeror cannot make such a representation, a full and complete explanation shall be submitted in writing with the offeror's response.

**REPRESENTATION REGARDING GRATUITIES**

Offeror represents that it has not, is not, and will not offer, give, or agree to give any employee or former employee of OST a gratuity or offer of employment in connection with any approval, disapproval, recommendation, development, or any other action or decision related to the solicitation and resulting contract. Offeror further represents that no employee or former employee of OST has or is soliciting, demanding, accepting, or agreeing to accept a gratuity or offer of employment for the reasons previously stated; any such action by an employee or former employee in the future, if any, will be rejected by offeror. Offeror further represents that it is in compliance with the Mississippi Ethics in Government laws, codified at Mississippi Code Annotated §§ 25-4-101 through 25-4-121, and has not solicited any employee or former employee to act in violation of said law.

**CERTIFICATION OF INDEPENDENT PRICE DETERMINATION**

By submitting a proposal, the offeror certifies that the prices submitted in response to the solicitation have been arrived at independently and without any consultation, communication, or agreement with any other offeror or competitor for the purpose of restricting competition.

L. Prospective Contractor's Representation Regarding Contingent Fees – By responding to this solicitation, the offeror represents that it has not retained any person or agency on a percentage, commission, or other contingent arrangement to secure this contract. If the offeror cannot make such a representation, a full and complete explanation shall be submitted in writing with the offeror's response to the Office of the State Treasurer prior to contract execution. (Appendix B)

Company Name Gr0

Signed Jonathan Zacharias

Print Name Jonathan Zacharias

Title Co-Founder and President

Date 11/02/2025  
MM DD YY





**APPENDIX C**  
**Release of Proposal as Public Record**

The offeror shall acknowledge which of the following statements is applicable regarding the release of its proposal as a public record. An offeror may be deemed non-responsive if the offeror does not acknowledge either statement, acknowledges both statements, or fails to comply with the requirements of the statement acknowledged.

**CHOOSE ONE:**

☐ Along with a complete copy of its proposal, offeror has submitted a second copy of the proposal in which all information offeror deems to be confidential commercial and financial information and/or trade secrets is redacted in black. Offeror acknowledges that it may be subject to exclusion pursuant to Chapter 15 of the PPRB OPSCR Rules and Regulations if MEMA or the Public Procurement Review Board determine redactions were made in bad faith in order to prohibit public access to portions of the proposal which are not subject to Miss. Code Ann. §§ 25-61-9, 75-26-1 through 75-26-19, and/or 79-23-1. Offeror acknowledges and agrees that MEMA may release the redacted copy of the proposal at any time as a public record without further notice to offeror. A offeror who selects this option but fails to submit a redacted copy of its proposal may be deemed non-responsive.

☒ Offeror hereby certifies that the complete unredacted copy of its proposal may be released as a public record by MEMA at any time without notice to offeror. The proposal contains no information offeror deems to be confidential commercial and financial information and/or trade secrets in accordance with Miss. Code Ann. §§ 25-61-9, 75-26-1 through 75-26-19, and/or 79-23-1. *Offeror explicitly waives any right to receive notice of a request to inspect, examine, copy, or reproduce its proposal as provided in Miss. Code Ann. § 25-61-9(1)(a).* An offeror who selects this option but submits a redacted copy of its proposal may be deemed non-responsive.

Signed Jonathan Zacharias

Print Name Jonathan Zacharias

Title Co-Founder and President

Date 11/02/2025  
MM DD YY



**APPENDIX D**  
**Acknowledgement of Amendments**

The offeror shall acknowledge receipt of any amendment to the RFP in writing. The acknowledgement shall be submitted with your bid package. Each bidder shall submit a written acknowledgement of every amendment to the Office of the State Treasurer on or before the submission deadline.

Please list the amendments acknowledged by the amendment number and date:

---

Amendment 1 received on 10/15

Amendment 2 received on 10/20

---

**Company Name:**

Gr0

---

**Printed Name of Representative:**

Jonathan Zacharias

---

**Signature / Date**

*Jonathan Zacharias*

11/02/2025

**Note:** Failure to sign the acknowledgement form may result in the bid/offer being rejected as non-responsive. Modifications or additions to any portion of this bid document may be cause for rejection.



**Request for Proposals  
Communications and Marketing Consultants  
RFP# 3120003221**

**Amendment #2  
Questions and Answers**

<b>Question#</b>	<b>Section#</b>	<b>Page#</b>	<b>Question (as submitted)</b>	<b>OST Response</b>
1	N/A	N/A	Is there a budget or budget range for this RFP?	Over the last five years, we have spent approximately \$685,000 for all communications and marketing. We hope to stay within this range.
2	N/A	N/A	Is there an anticipated or recommended budget range that OST would like respondents to consider?	See previous response to Question #1.
3	N/A	N/A	Will OST give preference to Mississippi-based agencies or those with an in-state presence?	Preference won't be given to in-state firms; however, any company selected must be a registered business entity with the Mississippi Office of the Secretary of State.
4	4.3.G	17	Is the intent to award a single contract, or would OST consider awarding portions of the scope to multiple vendors?	The RFP is open to awarding multiple contracts.
5	N/A	N/A	Are there specific KPIs (e.g., awareness lift, lead generation, claims processed for Unclaimed Property, CPSM/MACS enrollments, media reach/engagement) that OST wants tracked and reported?	We have internal systems that track claims processed and contract enrollments. No other KPIs are needed.

6	N/A	N/A	Should respondents assume the contractor will manage all media planning/buying, or does OST have existing media relationships/contracts we should plan around?	The current contract, which expires on December 2, 2025, is the only communications and marketing contract we have. However, we have working relationships with local media outlets, and we reserve the right to maintain those relationships.
7	N/A	N/A	We did not see a pre-proposal conference/meeting referenced. Could you please confirm whether one is scheduled?	A pre-proposal meeting is not scheduled.
8	N/A	N/A	I was hoping to understand which other local or regional government municipalities that the Office of State Treasurer for MS deems as a peer/competitor? This will give us an idea on how we approach our research.	Our peer set might be the agencies of other statewide elected officials and any other state agency that has public outreach. However, since each of our state agencies have different programs and responsibilities, our marketing and communications needs vary.
	N/A	N/A	What is the measurable OST Communications and Marketing goal?	<ul style="list-style-type: none"> <li>Unclaimed Property: Understanding of UP, that UP is not a scam, and number of claims initiated, and number of claims paid.</li> <li>College and Career Savings: Understanding of both state-sponsored 529 plans – MACS and MPACT, MPACT Contract Enrollments, MACS Accounts Opened and Funded.</li> </ul>
10	N/A	N/A	How will success be measured one year after the engagement begins for College Savings Programs (MPACT and MACS) and Unclaimed Property?	<ul style="list-style-type: none"> <li>College Savings Contract Enrollments</li> <li>Unclaimed Property Claims Paid</li> </ul>

11	N/A	N/A	What are the expected KPIs and conversions for each program?	See previous response to Question #5.
12	N/A	N/A	Do written marketing and media plans exist now for (1) College Savings Programs (MPACT and MACS) and (2) Unclaimed Property?	No written marketing/media plans currently exist.
13	N/A	N/A	Will any other marketing plans be available for review and use as a foundation?	No, we want original thought and concepts brought to the table for College and Career Savings as well as Unclaimed Property.
14	N/A	N/A	Are marketing materials design-only, or should printing be included in our estimates?	Printing should be included in your estimates.
15	N/A	N/A	If printing is needed, what quantities are expected for each piece?	This varies depending on the collateral, but we usually print 1,000 of an item at a time. College and Career Savings has the most collateral; Unclaimed Property currently only has a brochure.
16	N/A	N/A	Could you describe the primary and secondary target audiences for College Savings Programs (MPACT and MACS) and for Unclaimed Property?	<ul style="list-style-type: none"> <li>• Unclaimed Property: Adults 18+ in Mississippi.</li> <li>• College and Career Savings: Young Parents and Grandparents</li> </ul>
17	N/A	N/A	What age group has been most receptive to each program?	<ul style="list-style-type: none"> <li>• Unclaimed Property: All Adult Mississippians</li> <li>• College and Career Savings: Young Parents/Grandparents</li> </ul>

18	N/A	N/A	What media channels have been most successful in achieving OST's goals?	<ul style="list-style-type: none"> <li>Local Officials</li> <li>Facebook</li> <li>Talk Radio</li> <li>General Interest TV Interviews</li> <li>Mississippi Centric Channels</li> </ul>
19	N/A	N/A	Are there any media channels OST prefers to avoid?	<ul style="list-style-type: none"> <li>TikTok</li> </ul>
20	N/A	N/A	What is the expectation for event marketing?	<ul style="list-style-type: none"> <li>Print Materials: Yard Signs, Other materials to support the event if needed (event collateral)</li> <li>Social Media Marketing</li> <li>Media Spots</li> </ul>
21	N/A	N/A	What level of agency support is most needed to assist OST staff for events?	<ul style="list-style-type: none"> <li>OST Staff will handle event staffing. No in person staffing needed from anyone other than OST staff.</li> </ul>
22	N/A	N/A	Is there a PR plan in place now?	No
23	N/A	N/A	Does OST most need PR support with identifying story opportunities, writing and distributing releases, pitching stories, or other PR activities?	<ul style="list-style-type: none"> <li>Our biggest goal is always to increase awareness of Unclaimed Property and College and Career Savings Mississippi. We have done a lot of work to bring awareness of our programs to Mississippians but feel we still have a long way to go. The biggest hurdle for Unclaimed Property is people thinking it is a scam.</li> <li>We are looking for support writing draft press releases, pitching stories, and bringing awareness to our programs.</li> </ul>



24	2.1 – 2.1.4 4.2	7-9 15-16	<p>I'm working through RFP# - 3120003221, and it is requesting a proposal for management and a separate proposal for technical.</p> <p>I've reviewed the RFP and found some sections of what should be included in our response, but I did not see a breakdown of what should specifically be included in the management and what should be in the technical.</p> <p>Apologies if I am overlooking it, but is there a section or separate document showing exactly what should go in each proposal?</p>	The Scope of Services and Information Required on Pages 7-9 as well as the Evaluation Criteria on pages 15-16 detail what should be included in your proposal.
25	1.6	5	Could we request an extension to the submission deadline considering the upcoming holiday?	The submission deadline has been extended to November 3, 2025
26	N/A	N/A	Do you have an incumbent and would they be participating in this RFP?	Yes, we currently have a communications and marketing contract / incumbent, and they will be submitting a proposal.
27	N/A	N/A	Could you let us know if you have a local preference or are you open to a Canadian agency that has done similar work with clients across the United States, with some currently being the States of California, Colorado and Wyoming?	See previous response to Question #3.
28	N/A	N/A	Could you let us know what the budget is for this work?	See previous response to Question #1.
29	2.1 – 2.1.4 4.2	7-9 15-16	Will the new amended RFP provide guidance on how your folks would like the proposals written?	See previous response to Question #24.

30	N/A	N/A	I came across your communications RFP and was wondering if you are open to bids from Canada.	See previous response to Question #3.
31	1.5	5	Is it okay if we wait until we review answers to questions, on October 20th, before deciding whether we would like to keep our previously submitted proposal, or submit a new one?	It is certainly fine to wait until October 20 to decide if you want to resubmit. The new deadline is November 3 <sup>rd</sup> .
32	Appendix B Appendix C Appendix D	26 27 28	Also, if we would like to keep our submitted proposal the same, would we need to fill out and submit the newly added Appendix C and Appendix D documents separately?	If you decide not to resubmit a proposal, please complete a new Appendix B (it has been modified), as well as Appendix C and D.
33	N/A	N/A	Will OST provide an approximate annual marketing budget or allocation per program to help respondents plan appropriate levels of strategy, creative development, and media activity?	See previous response to Question #1.
34	N/A	N/A	Does OST anticipate providing a separate media budget outside the professional services contract for paid placements, or should respondents include projected media spend within their proposed fixed-price cost structure?	In some instances where our local media relationships may come into play, we would anticipate using a separate media budget, but otherwise please include budgetary estimates in your proposal.
35	N/A	N/A	Are there any current sports marketing partnerships OST would like maintained or re-evaluated, or should respondents propose new collegiate and community partnerships from scratch?	We have several current sports marketing contracts pertaining to the college savings programs that are negotiated outside this contract. However, this does not preclude the vendor from proposing additional opportunities.
36	N/A	N/A	Is there an incumbent communications contractor, and if so, should respondents anticipate transition support during the contract start-up period?	There is a current expiring contract. So, yes, there may be action required to ensure smooth transition and continuity.

37	N/A	N/A	Can OST clarify the expected scope of employer marketing? For example, does OST envision statewide employer partnerships coordinated by the contractor, or is the intent primarily to provide creative toolkits and messaging for OST staff to distribute?	Primarily the latter.
38	N/A	N/A	Should respondents assume media-relations management (pitching, press lists, monitoring) or only message development and press-release drafting under this item?	Pitching and monitoring may be needed. However, in those cases where Treasury personnel may have existing relationships, these outreaches will be made in close coordination with Treasury staff.

**Receipt of Amendment #2 Acknowledged:**

Company: Gr0 \_\_\_\_\_

By: *Jonathan Zacharias* \_\_\_\_\_

Printed Name: Jonathan Zacharias \_\_\_\_\_

Title: Co-Founder and President \_\_\_\_\_