



# INTEGRATED MARKETING PROPOSAL



Project Proposal: Integrated Marketing & Project Management

Client: Advanced Pro Technologies

Delivered on: 3/10/2018

Submitted by: Honor Roll Studios

# OVERVIEW AND GOALS

Thank you for allowing me the opportunity to attend the APT Board Meeting and present our services to the team. It was a pleasure meeting everyone and I look forward to building a partnership that leads to great success.

Through our integrated marketing retainer, we will execute a results-oriented strategy and will refine the program and campaigns to achieve the best results possible. Digital marketing isn't something you do once, it takes consistent content creation, fine tuning and ongoing measurement to establish brand awareness and be recognized as the vendor of choice in the industry. Following the retainer model, we effectively become your marketing department. HRS will develop and implement the company marketing strategy, develop quality leads and drive positive ROI.

## DELIVERABLES

- Build company awareness in the marketplace
- Introduce products and services to the market
- Drive customer identification and establish new leads
- Establish company narrative and build brand loyalty
- Develop and implement a unified corporate marketing strategy

# SCOPE OF SERVICES

## DESIGN AND IMPLEMENT CORPORATE MARKETING PLAN

Develop a marketing plan that takes stock of your current position, and implement strategies and activities that will meet the APT annual goals.

## DEFINE TARGET DEMOGRAPHIC

For brand marketing to be truly effective you have to know who your audience is and how best to reach them. We'll take what you already know, and bring new insights, create targeted campaigns, and measure effectiveness.

## WEBSITE + ONGOING CREATION OF CAMPAIGN LANDING PAGES

We will perform a complete website review and update, implement proper SEO tools, establish clear call to action requests, and develop targeted landing pages to connect all integrated marketing initiatives.

## IMPLEMENT CORPORATE WEBSITE + SOCIAL MEDIA LEAD GENERATION TOOLS

Utilizing existing content, we will update all brand and marketing messaging and install tools to begin capturing leads immediately. We will perform regular monthly reviews to ensure effectiveness and success of messaging that results in optimal lead capture.

## CREATE EDITORIAL CALENDAR

In order to keep content flowing smoothly, we'll create a collaborative editorial calendar that will keep all content creators on the same page.

## WEEKLY CONSULTING & MONTHLY REPORTING

As your marketing department, we will develop, implement, manage and work in partnership with the APT leadership and sales teams to achieve company goals. We'll also spend time helping you analyze your existing results, and strategizing for success.

## MARKETING RESOURCES AND TOOLKIT

Establish and create marketing resources for specific sales goals, campaign development and implementation, and analytics reporting.

Develop marketing toolkit for sales team (including message, collateral, resources, videos)

# SCOPE OF SERVICES

## HUBSPOT MANAGEMENT + TRAINING & SUPPORT

We'll handle all details of running the HubSpot tools, including workflows, list segmentation, landing pages, etc. Our goal is to serve as a strategic partner and not to operate separately from APT.

## WEEKLY KEYWORD ANALYSIS

We spend substantial time researching what's working, and potential opportunities for our ongoing marketing efforts. This combination of science and art is an important aspect of foundational marketing initiatives.

## LAUNCH TARGETED CAMPAIGNS

Create targeted marketing campaigns for identified verticals & decision makers. For each campaign, our team will do all creative content development (video, text, static, display) and manage promotion on all social media portals including LinkedIn, Facebook and YouTube.

## EMAIL MARKETING

Based on our strategies, we'll help execute all email marketing campaigns using HubSpot.

## CREATE NEW MONTHLY OFFERS

New offers create new leads, so we'll need to continually create new content that your customers will want to read. We'll coordinate new offers each month using our signature production method.

## CREATE THE ENTIRE LEAD GENERATION SEQUENCE FOR EACH OFFER

An effective offer path means that we create calls-to-action, landing pages, the appropriate forms, thank you pages, and follow-up emails that all work together.

## DEVELOP AUTOMATED WORKFLOWS AND LIST SEGMENTATION

We'll set up workflows that help move leads through the sales funnel.

## SALES CRM GUIDANCE & INTEGRATION

In order to create an integrated campaign flow leading to positive ROI, we'll work with your CRM to tie in the data between HubSpot and the CRM. This effort should close more sales from generated online leads. By connecting HubSpot and APT's CRM, we'll be able to report specific ROI on your marketing dollars.

# YOUR INVESTMENT

Below is the monthly budget we've estimated based on the scope of services outlined earlier in this proposal. Our fees are based on the time required and services rendered and will be billed at the all-inclusive fixed rate for the contract period of one (1) year from the date of the contract.

## MONTHLY BUDGET

DESCRIPTION	MONTHLY COST
Full Integrated Marketing & Digital Services <i>HRS will absorb \$15k of fees per month</i>	\$50,000 -\$15,000
<b>*Integrated Marketing and Digital Services monthly fee - <i>Strategy, Creative/Branding, Digital Marketing &amp; Advertising</i></b>	\$35,000

\* If you select the Discounted Integrated Marketing & Digital Services Monthly Package, we can work to establish a backend compensation model.

Expenses for creative still ads, display, music, video production, web design, travel (within 200 miles of our studio), meals, lodging, report production and analytics are included or will be absorbed by HRS (Honor Roll Studios). Actual print cost, advertising at conferences, TV/Cable, radio will be billed direct to APT. Creative for ad placements will be covered by HRS. In addition, if there are fees for purchasing tools, APIs, or software specific needs to connect into APT CRM or other systems we will bring those to APT for consideration. We are sensitive to the financial challenges facing a growing business. It is our objective to help shoulder some of this expense in the marketing arena by discounting our services and fees so together we can build something bigger. We will always use our utmost discretion to keep costs low and still achieve the desired results. There will be times which require new development (building an app, online training platform, or other new opportunities that we agree would be beneficial) and in those instances we will work together to determine the most cost effective options to reach optimal return.



## WHY US?

At Honor Roll Studios, we're all about the results. We uncover who your target market is, we build marketing personas to determine how to reach your audience, we develop creative to engage the desired audience, and we drive traffic to your sites/landing pages, and create and manage APT social media accounts to convert leads into paying customers. Corporate marketing, product marketing, and services marketing are all about creating an engaging experience that transforms leads into clients, and clients into customers for life.



**AGREEMENT FOLLOWS**

# COMPREHENSIVE INTEGRATED MARKETING RETAINER AGREEMENT

Date: 3/15/2018

Between "us", Honor Roll Studios / ES Honor Roll LLC (HRS), and "you", Advanced Pro Technologies (APT)

Advanced Pro Technologies, located at "6860 N. Dallas Parkway, Suite 242 Plano, TX 75024" are hiring Honor Roll Studios located at 4801 Spring Valley Rd Suite 116 Dallas TX 75244 to perform Integrated Marketing and Digital Services for the total price of \$35,000/month as outlined in the proposal.

## 1.0 SERVICES RENDERED

### MARKETING CONSULTATION

We will work in partnership with you to create a marketing strategy that will increase lead generation, expand brand awareness, and increase sales. We will meet with the APT leadership team and sales teams on a regular basis to ensure continuity and desired outcomes.

### HUBSPOT INSTALLATION AND TRAINING

If agreed upon, we will set up Hubspot for marketing campaign efficiency and tracking. Hubspot is a third-party software, so we are unable to control development or version control. However, Hubspot is the leading software utilized by companies and agencies around the globe for managing marketing campaigns and is our recommended platform for implementation.

### CONTENT DEVELOPMENT

HRS will develop a content strategy for your campaign each month including video, creative, social media posts, Ads & copy and collateral.

### WEBSITE LANDING PAGE DESIGN & TESTING

HRS will create top-of-funnel offers and design landing pages to drive traffic and establish leads. We write code using HTML, CSS, Javascript, test on Mac OSX, Windows, iOS & Android devices.

### SOCIAL MEDIA CONSULTING & MANAGEMENT

HRS will use Hubspot and our other proprietary platforms to monitor your social media analytics and manage all social accounts.

### TECHNICAL SUPPORT

HRS will offer support relating to your Wordpress website and Hubspot software. We don't offer hosting, but will secure hosting with another company who will handle downtime or email issues relating to your hosting account.



## **CHANGES AND REVISIONS**

We recognize fixed price retainers can be challenging if flexibility is not established from the beginning. It is our goal to be a partner of APT and grow with you along the way. There will be times when certain campaigns, development, new applications, and other activities will be necessary to consider. It is our objective to utilize our team and facilities in the most effective way possible. We are reducing our market rates so that we can demonstrate our commitment to this partnership while also being realistic to what is necessary to achieve the desired outcomes we have discussed.

## **ERRORS**

We can't guarantee that our work will be error-free (we are human) so we can't be liable to you or any third-party for damages, including lost profits, lost savings or other incidental, consequential or special damages, even if you've advised us of them. We will be marketing your materials, products, and services based upon guidance provided from you and will rely on you to notify us of material changes or alterations that are needed to any communications, advertisements, or product descriptions.

## **2.0 MUTUAL COOPERATION**

We agree to use our best efforts to fulfill and exceed your expectations on all deliverables listed in the proposal. You agree to aid us in doing so by making available to us needed information pertaining to your website, products & services and to cooperate with us in expediting the work necessary to achieve the desired results.

## **3.0 CHARGES FOR SERVICES PERFORMED**

3.1 Requests above and beyond our monthly budget may be considered out-of-scope and an amendment to the budget will be recommended. Projects that go dormant for longer than 45 days may incur fees to resume work at the discretion of Honor Roll Studios.

## **4.0 TERMS OF PAYMENT**

### **4.1 BILLING SCHEDULE**

We're sure you understand how important it is as a small business that payment of services be a seamless process.

The total monthly budget for this project during the next twelve months has been discounted from a market rate of \$50,000 to a partner rate of \$35,000 per month.

Honor Roll Studios is ready to begin this journey and will invoice 50% of the monthly retainer upon approval of this agreement and with an anticipated start of March, 15, 2018. Moving forward, HRS will invoice APT on the 15th of each month with a payment due date of the 1st calendar day of the month.

APT will supply HRS with all necessary purchase order numbers and other internal information required for invoice processing as applicable.

### **4.3 CLIENT AGREEMENT TO PAY**

APT agrees to pay the contract initiation invoice upon receipt which will act as the launch of the project. Every invoice after will be sent to APT on the 15th of the month and due on the 1st calendar day of each month. In the event payment is not made on the first calendar day of the month, HRS will charge a late payment fee of 1% per month on any overdue and unpaid balance not in dispute, to cover the manpower, interest, and other costs HRS pays for carrying overdue invoices from APT. In addition, HRS reserves the right to stop work until payment is received.

### **4.4 COLLECTION COSTS**

In the event that HRS incurs legal fees, costs and disbursements in an effort to collect outstanding invoices, in addition to interest on the unpaid balance, APT agrees to reimburse HRS for these expenses.

## **5.0 CANCELLATION OF PLANS**

You have the right to modify, reject, cancel or stop any and all plans or work in process. However, you agree to reimburse us for all costs and expenses we incurred prior to your change in instructions, and which relate to non-cancelable commitments, and to defend, indemnify and hold us harmless for any liability relating to such action. We agree to use our best efforts to minimize such costs and expenses.

## **6.0 RESPONSIBILITIES OF HONOR ROLL STUDIOS**

### **6.1 RESPONSIBILITY FOR RELEASES**

HRS will obtain releases, licenses, permits or other authorization to use testimonials, copyrighted materials, photographs, art work or any other property or rights belonging to third parties obtained by HRS for use in performing services for APT (as applicable).

### **6.2 CLIENT RESPONSIBILITY FOR RELEASES**

APT guarantees that all elements of text, images, or other artwork you provide are either owned by APT, or that you have permission to use them.

When your final payment has cleared, copyright will be automatically assigned as follows:

APT will own the visual elements that we create for this project. We'll give you source files and finished files and you should keep them somewhere safe as we're not required to keep a copy. You own all elements of text, images and data you provided, unless someone else owns them.

HRS will own the unique combination of these elements that constitutes a complete design and we'll license that to you, exclusively and in perpetuity for this project only, unless we agree otherwise. We can provide a separate estimate for those costs at that time.

### **6.3 CLIENT RESPONSIBILITY FOR ACCURACY**

You shall be responsible for the accuracy, completeness and propriety of information concerning your products and services which you furnish to us verbally or in writing in connection with the performance of this Agreement.

## **7.0 CONFIDENTIALITY**

Honor Roll Studios acknowledges its responsibility, both during and after the term of its appointment, to use all reasonable efforts to preserve the confidentiality of any proprietary or confidential information or data developed by Honor Roll Studios on behalf of APT or disclosed by APT to Honor Roll Studios.

## **8.0 TERM AND TERMINATION**

### **8.1 PERIOD OF AGREEMENT AND NOTICE OF TERMINATION**

This Agreement shall become effective as of 3/15/2018 and shall continue until terminated by either party upon not less than 60 days' notice in writing given by either party to the other.

### **8.2 TERMINATION FOR CAUSE**

Either party to this Agreement may terminate the Agreement if the other party defaults in the performance of any of its material duties and obligations and the default is not cured within thirty (30) days of the receipt of notice of said default, or if the default is not reasonably curable within said period of time, unless the defaulting party commences cure within said period of time and diligently proceeds to cure the default. This agreement will auto renew for an additional twelve (12) month period unless either party initiates changes to the existing agreement.

### **8.3 PAYMENT FOR NON-CANCELABLE MATERIAL?**

We agree to use our best efforts to minimize such liabilities immediately upon written notification from you. We will provide written proof, upon request of APT, that any such materials and services, are non cancelable.

Any non-cancelable materials, services, etc., we have properly committed ourselves to purchase for your account, (either specifically or as part of a plan such as modules, photography and/or external services) shall be paid for by you, in accordance with the provisions of this Agreement.

#### **8.4 MATERIALS UNPAID FOR**

If upon termination there exist any materials furnished by us or any services performed by us for which you have not paid us in full, until such time as you have paid us in full you agree not to use any such materials, in whole or in part, or the product of such services.

#### **8.5 TRANSFER OF MATERIALS**

Upon termination of this agreement, provided that there is no outstanding indebtedness then owing by APT to Honor Roll Studios, Honor Roll Studios shall transfer, assign and make available to APT all property and materials in its possession or control belonging to APT. APT agrees to pay for all costs associated with the transfer of materials.

### **9.0 GENERAL PROVISIONS**

#### **9.1 GOVERNING LAW**

This Agreement shall be governed and construed in accordance with the laws of the State of Texas.

#### **9.2 REPRESENTATIONS AND WARRANTIES**

The parties each individually represent and warrant that each has full power and authority to enter into this Agreement and to perform all of their obligations hereunder without violating the legal or equitable rights of any third party.

#### **9.3 ENTIRE AGREEMENT**

Except as otherwise set forth or referred to in this Agreement, this Agreement constitutes the sole and entire Agreement and understanding between the parties hereto as to the subject matter hereof, and supersedes all prior discussions, agreements and understandings of every kind and nature between them as to such subject matter.

#### **9.4 SEVERABILITY**

If any provision of this Agreement is held to be illegal, invalid, or unenforceable under any present or future law, then that provision will be fully severable. In such instance, this Agreement will be construed and enforced as if the illegal, invalid, or unenforceable provision had never comprised a part of this Agreement, and the remaining provisions of this Agreement will remain in full force and effect.

Jason B. Roach, to accept this contract, please sign below and you will be given a signed copy for your records.

## NEXT STEPS

1. Please read the entire agreement on the previous pages to make sure you understand all the details involved with us working together. It's really important to us that everything is transparent and understood from the beginning so that we lay a solid foundation for a great working relationship.
2. If you have any questions at all, please let us know. We're happy to clarify any points and there may be some items that we can sort out together. We're committed to finding the best way to work together.
3. Once you feel confident about everything and are ready to move forward, please sign below above your printed name.
4. Once we receive a signed copy of this agreement acknowledging your acceptance, we'll contact you shortly to sort out next steps and get the project rolling.

\_\_\_\_\_ DATE: \_\_\_\_\_

KENT POTTER

CO-FOUNDER HONOR ROLL STUDIOS, ES HONOR ROLL LLC.

\_\_\_\_\_ DATE: \_\_\_\_\_

JASON B. ROACH

VP BUSINESS DEVELOPMENT, ADVANCED PRO TECHNOLOGIES