



# RFP RESPONSE

**DATE:** Wednesday, September 9, 2020

**TO:** Erin Ruth, AICP - Director of Planning & Development

**PROVIDED BY:** Sarah Hurley, Owner, Director of Client Marketing, at Weber Marketing

**SUBJECT:** Request for proposal response: Marketing and Brand Initiative

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## PROJECT SUMMARY

Gather insights to craft a relevant brand framework that leads to highly effective brand identification and strategy to drive business attraction and retention for the Village of Cottage Grove (VCG/Client).

## ABOUT WEBER MARKETING

Weber Marketing was established in May 2010 and is located in Cottage Grove, Wisconsin. The company employs one individual, the owner, Sarah Hurley.

Prior to Weber Marketing, Sarah served as an Account Executive (AE) at Hiebing, Madison's largest advertising and marketing agency. In the Account Executive role, the function is to work closely with the assigned client account in understanding the project needs, goals, product/service differentiation, budget and timelines and then relay the information through the agency in a way that sets each agency department/team member up for success. The Account Executive is positioned as the go-between working efficiently on project plans, translating detailed information to and from each side of the workflow (client and agency team) in order to meet project goals.

When Weber Marketing first launched, Sarah served in a similar role but relied on a virtual creative team rather than an internal one. Sarah has a close-knit relationship with a small group of independent marketing professionals she works with on an as-needed basis. This business model keeps costs down, accountability high and ideas fresh.

Over the last five years, in addition to playing this AE role, Sarah has also found a unique niche serving as a contract-based marketing director for clients. This has allowed her to go deeper in the behind-the-scenes operational efforts clients ultimately need to realize marketing success. An organization can buy the best-placed digital advertising campaign, but without the people, process and technology to understand and monitor that investment, a client will never realize a good ROI. This ability to identify operational gaps ahead of execution (or signing a large spend contract) is what sets Weber Marketing apart from other independent marketing consultants or marketing agencies. Sarah's experience, along with that of her team, collectively benefits her clients' roadmap to marketing success. Weber Marketing's goal is not to seek out the "quick" buck with cookie-cutter projects. Our goal is to set clients up for long-term success that provides results.

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## PROJECT TIMELINE *(Approximate timeline with Board meeting/approval and buffer time included)*

Vendor selection	2020
Work to begin	January 2021
<b>Phase 1:</b> Meet and greet with team	Week 1
Weber Marketing to follow up with meeting notes, <i>(if necessary)</i> revised scope & estimate	Week 2
Approval	Week 3
Research strategy and plan provided to VCG for approval	Week 5
Research - execution and assessment Research conducted: Weeks 8-12 Final report: Week 14	Week 6 - 14
Insights - development of brand framework Check-in / First round review: Week 17 Final presentation: Week 18	Week of 16 - 18
Feedback / Approval	Week 19
Brand development - concept and approval Check in / First round review: Week 22 Final presentation: Week 24	Week of 20 - 24
Feedback / Approval	Week of 25
Delivery of Brand Standards Guide	Week of 26
Marketing Plan - development of 12 month plan Check in / first round review: Week 27 Final presentation: Week 28	Week 26 - 28
Feedback / Approval	Week of 28-30
<b>Phase 2:</b> Template exploration and set up <i>Will be done in conjunction with Phase 3</i>	TBD
<b>Phase 3:</b> Execution of marketing plan <i>Will be based on plan approval</i>	TBD

Approximate project duration: January 2021 - July 2021

+ Template exploration and set up: TBD based on approved solution (approx 4-6 weeks)

+ Execution of 12 month marketing plan: August 2021 - July 2022

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## PROJECT ESTIMATE

**Phase 1:** \$32,750 - \$38,500: Marketing research, brand development, brand standards guide and marketing plan

**Phase 2:** \$4,500 - \$7,000: Evaluation and set up of marketing design software (e.g., Adobe Creative Suite) or platform (e.g., Canva) to be maintained by Village staff for marketing templates ( e.g., social media graphics, print ads, etc). To include up to 5 design templates.

**Phase 3:** \$25,500 - \$65,000: Marketing plan execution (TBD will be based on CGV approval and/or provided budget guidelines)\*‡

\*Does not include final media, digital consultation, event related location or food/beverage, and/or advertising cost

‡This portion is difficult to estimate at this point with no conversation and no research or brand to base ideation off of. *If the Village of Cottage Grove would like to stay within provided budget parameters, Weber Marketing will author a plan accordingly.*

All subcontracting work is billed through Weber Marketing.

Media, digital advertising, or other outside supplier expenses will have an estimate provided to the Village of Cottage Grove for approval. Fees can either replace other plan ideas or be added on in addition to. Such cost may be outside of the below billing cycle and will be determined by the approved outlet.

## Billing Cycle

Phase Status	Amount Due	Due Due
Phase 1	25%	December 15, 2020
Phase 1	25%	February 15, 2021
Phase 1	25%	April 15, 2021
Phase 1	Balance	June 15, 2021
Phase 2	50%	August 15, 2021
Phase 2	Balance	September 15, 2021
Phase 3	Activity to-date based on approved plan	15th of every month

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## PROJECT GOALS AND OBJECTIVES

As described in the provided RFP, Weber Marketing, led by owner Sarah Hurley, would make the ideal fit as the qualified consulting firm to meet the project goals and objectives in that:

1. **Economic development:** Sarah Hurley and her husband are both small business owners in Cottage Grove and can speak with firsthand experience of owning and operating a business in a small, yet growing community such as Cottage Grove.

Sarah is a current member of the Cottage Grove Chamber of Commerce and has been a highly active member over the last five years. She serves on the Board of Directors and is the Chairperson of the Marketing Committee. Sarah has a direct link to current business owners within Cottage Grove and has listened and learned from them on why they chose to open their doors in Cottage Grove.

Using this information, in 2019 Sarah developed the **Cottage Grove IS Open for Business** initiative that worked to reach outside the Cottage Grove boundaries to encourage Southern Wisconsin businesses to look at Cottage Grove for relocation, business development and employment opportunities. Sarah brought attention to the Cottage Grove business community through partner projects and speaking engagements.

2. **Community identity:** A native to Cottage Grove, and currently living in Cottage Grove with her family, there's no better cheerleader for Cottage Grove than Sarah Hurley.

As a member of the Cottage Grove Chamber, Sarah participated in the chamber's own branding effort to bring a professional, unified look to the chamber community's marketing and promotional activities. This included the design of the chamber logo and serving as project manager and creative director when working with outside graphic designers and other vendor partners on marketing-related initiatives.

In addition to the **Cottage Grove IS Open for Business** initiative (detailed above), Sarah also developed and executed the **Cottage Grove FIRST** initiative that promotes buying local to residences and businesses. This initiative has since been used throughout the Cottage Grove Chamber to encourage members and their employees and families to think of a Cottage Grove business first, before looking elsewhere for their personal or business needs.

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3. **Uniformity:** Sarah has 20 years of experience working as a marketing professional. She has helped clients in a variety of industries pinpoint their strategic message and then served as the liaison between clients and the creative and media personnel to successfully execute marketing projects.

Using a disciplined approach, Sarah works directly with her clients to peel back the layers to discover the defining qualities, value statements and unique selling points that are used as the foundation for a focused message strategy that leads to a realistic marketing plan with top-level creative execution.

4. **Flexibility:** Sarah brings insights from both the advertising agency world and those gained working within marketing departments for large and small companies. She has broad experience working across product and service departments and with external vendor partners, using a mix of technology platforms, and a history of executing marketing projects with a consistent brand message.

Weber Marketing has vast experience developing a brand hierarchy. In the case of the Village of Cottage Grove, the Village would be “the brand,” while departments and municipal functions within the Village would receive an adaptable template for their specific needs.

5. **Continuity:** Small businesses and organizations often request that all end products (e.g., design files) be delivered in a format that allows staff to be self-sufficient. With a variety of low-to-no cost options, this request is possible, but it will require discussion and research to determine if this is the right choice for the Village. This decision should ultimately be based on the skill level and comfort of the Village staff.

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## RESEARCH PROJECT ACTION STEPS

The following are high-level action steps for initial conversational purposes. Greater detail will be provided at project kick-off.

### **Step 1:** Background and scope

In our project kick-off meeting, VCG will provide basic information to start the conversation (e.g., "We want to know why businesses choose Cambridge to open their doors?" or "What are the selection criteria a business uses when selecting location?") that Weber Marketing will use to form a research strategy and plan.

### **Step 2:** Research

Much of this step will be determined by the answers and discussion in Step 1.

For discussion purposes, this will likely be a mix of a questionnaire administered through Survey Monkey along with focus groups. The audience would be:

- Current Cottage Grove businesses
- Community business owners as described in Step 1
- Target market (state-wide government agencies, commercial bankers, and commercial real estate agents, etc)

Weber Marketing will manage the development of the survey questions, manage the upload and analysis of Survey Monkey results, along with creating the discussion guide and conduct the focus group interviews.

### **Step 3:** Report

Weber Marketing will provide a topline report recapping the findings and recommendations.

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## BRAND FRAMEWORK ACTION STEPS:

**Step 1:** Review of surrounding community branding along with conducting insight interviews with core team members to build the starting point of Village brand framework.

**Step 2:** Development of brand framework that includes brand promise statement options, core values, benefits, and other key elements.

**Step 3:** Design and development of up to 3 logo and tagline options.

**Step 4:** Use selected logo to complete 2 branded items (i.e. social media graphic, 1 slide for powerpoint template) to show in use and discuss other use case scenarios.

**Step 5.** Finalize type, color palettes, etc.

**Step 6.** Finalize brand standards guide.

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## DEVELOPMENT OF MARKETING PLAN ACTION STEPS:

**Step 1:** Utilizing topline report from preliminary research, along with notes from the kickoff meeting, and approved budget number, Weber Marketing would author a draft marketing plan that would be based on:

- Target market
- Realistic execution goals
- Out-of-the box ideas to elevate the awareness of the Cottage Grove business community and call out key reasons to do business here
- Recognition of the need for Village staff to be self sufficient in execution, maintenance and ongoing management

While specifics for the marketing plan will come as the project proceeds, the following initiatives are likely to be included:

- Digital strategy and plan
  - SEO audit and update
  - Robust digital retargeting advertising
  - Increase in social media presence and content designed to engage target audience
  - Content development (copy and video) to be used on the Village website, email marketing and social media
- Account Based Marketing (ABM) strategy that hyper focuses on key contacts within target audience
- Public relations strategy and plan to heighten the professionalism of the Village staff, their work and vision while highlighting why doing business in Cottage Grove is worth a look
- Outreach marketing that focuses on collaborating with like-minded or organizations focused on shared target audience in collaboration activities (hosted roundtable events, webinars, co-op advertising, etc)

**Step 2:** Present plan and collect feedback from VCG staff

**Step 3:** Provide updated plan with feedback incorporated; included will be marketing calendar and cost estimate per initiative

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## EXECUTION OF MARKETING PLAN ACTION STEPS:

**Step 1:** A project plan along with a detailed timeline will be provided two weeks following the approved marketing plan.

**Step 2:** Weber Marketing to manage the execution including project kick-off meetings, team check-in meetings and necessary approvals. It is up to the VCG to bring attention to necessary stakeholder approvals that may be required. VCG will also manage the internal process to seek such approvals.

**Step 3:** Tracking of campaign success will be established based on the approved plan. Weber Marketing works in close coordination with outside vendor partners to ensure tracking metrics are set up and visible to all parties involved.

## TEMPLATE CREATION ACTION STEPS:

**Step 1:** Assess VCG preference, current in-house software and/or platforms in use for marketing design and future needs.

**Step 2:** Research options (e.g., Adobe Creative Suite, Canva, etc) and provide VCG with a list of top 3 options with pro and con list and recommendation.

**Step 3:** VCG to purchase and conduct installation of approved software or platform or combination of (including necessary training for VCG users)

**Step 4:** Create templates for up to 5 marketing project needs; recommended:

- Business card
- Powerpoint template (master slide, introduction slide and 1 interior slide)
- Letterhead
- 1 department (Parks & Recreation) usage
- VCG social media awareness graphic

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## REFERENCES

John Loeffler

Bank of Sun Prairie

SVP, Director of Retail Banking

Phone: (608) 467-1788 | Email: [John.Loeffler@bankofsunprairie.com](mailto:John.Loeffler@bankofsunprairie.com)

Purpose: Served as contract marketing director for 15 months

Amy Bauer

President of the Cottage Grove Chamber of Commerce

Phone (608) 443-1990 | Email: [abauer@mononabank.com](mailto:abauer@mononabank.com)

Purpose: Provide consultation and project management for marketing related efforts

Mike Kerr

Former Executive Director of Wisconsin Technology Initiative (WTI)

Phone: 608.345.4844 | Email: [mikerr1313@gmail.com](mailto:mikerr1313@gmail.com)

Purpose: Served as Community Manager for this nine year project on behalf of John and Tashia Morgridge. WTI ended in June of 2019. In my role I worked with our Executive Director to bring over 200 Wisconsin school districts together to focus on planning for and implementing technology for their district and classrooms. A large portion of my role was coordinating our bi-annual, 2-day technology conference.

## WORK SAMPLES

A digital portfolio can be seen at:

Brand identity:

- Portfolio of my Creative Director and Graphic Designer: <https://lucky-creative.com/portfolio/>
- Weber Marketing: <https://www.webermkt.com/brand-identity>

Integrated campaigns:

- Weber Marketing: <https://www.webermkt.com/campaigns>

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## The Team

*Lead Contact | Strategy | Project Manager:* Sarah Hurley, Owner of Weber Marketing

Website: [WeberMKT.com](http://WeberMKT.com)

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

Sarah is the owner of Weber Marketing where she brings 20 years of agency, client-side and experience as a small business owner to every project. She takes a disciplined approach with client projects and understands the power of good communication and good listening. You'll find she puts a lot of emphasis on setting her clients, creative team members and other partner relationships up for success.

Her unique style pulls out the "ah-ha" moments that lead to pivotal moments in the creative development process. She enjoys going behind the scenes of marketing operations to ensure client success goes beyond a single project outcome.

*Creative Director | Design:* Clint Prescott

Website: <https://lucky-creative.com/>

LinkedIn: <https://www.linkedin.com/in/clint-prescott-5bb6934/>

*Writer:* Vicky Franchino

Website/blog: <https://caffeineclarity.com/>

LinkedIn: <https://www.linkedin.com/in/vicky-franchino-4710398/>

*Research consultant, digital strategist and other team member contact information will be provided up approval of this proposal.*

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## Assumptions and Expectations

- Weber Marketing will review this proposal including (but not limited to) the details of project summary, timeline, budget and action steps following the proposed meet and greet with both teams: January 2021. If necessary, Weber Marketing will re-submit this statement of work with edits, corrections, additions based on project needs.
- Unknown at this time (9/9/2020) is the process for project approval with VCG, necessary Board meeting dates where project status or outputs may need to be presented and/or approvals necessary that may impact this project and timeline. It is the responsibility of VCG to bring any necessary information to the attention of Weber Marketing as of the meet and greet date in January 2020.
- Cost not included: Tax, printing, postage, Survey Monkey fees, media, SEO or digital consultation/updates, digital advertising, mileage, overnight / out of town accommodations, licensing or fees for stock photos or illustrations for long term use beyond one time usage, fees related to focus group efforts.
- Estimate provided for the marketing plan execution will be reevaluated and a revised estimate will be provided for approval by the Village of Cottage Grove. If the Village of Cottage Grove would like to stay within the provided estimate, Weber Marketing will author a plan accordingly.
- Deliverable and timelines provided based on reasonable availability and approval received from appropriate Village of Cottage Grove team member(s): Should delays occur outside the control of Weber Marketing, all deliverables and timelines are subject to change.
- Estimated cost and timelines are for the intended purpose of working with the Village of Cottage Grove directly. Should the desire to partner with the Township, Cottage Grove Chamber of Commerce or other Cottage Grove group, this estimate and timeline are subject to change.
- Weber Marketing will provide ongoing status updates, along with budget updates; Weber Marketing recommends holding 15 to 30 minute weekly project check in meetings with appropriate stakeholders in addition to email and status report updates.
- 25% of the cost estimate is due as of December 15, 2020 for work to begin January 2021. Weber Marketing will send an invoice per the billing cycle (page 3); Payment is due NET 15 days.
- If this project is canceled at any time, Village of Cottage Grove will pay for all billable time to-date and all incremental expenses.
- All projects are highly confidential. Weber Marketing will not disclose information without verbal or written authorization to anyone other than those associated with Village of Cottage Grove unless otherwise directed.
- All information contained within the statement of work from Weber Marketing is considered confidential and proprietary information from Weber Marketing and should not be distributed or shared with any other party without the express written consent of Weber Marketing.

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## Village of Cottage Grove

Printed Name: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

Signature: \_\_\_\_\_

## Weber Marketing, LLC

Printed Name: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

Signature: \_\_\_\_\_