



## Digital Agency Proposal Asset Management Strategies

August 3, 2018

## Asset Management Strategies Background

Asset Management Strategies (AMSRIA) is an established asset management firm located in Indianapolis, Indiana. In order to increase its digital footprint and gain sales qualified leads, AMSRIA seeks to target employees at large corporate institutions to help them manage their 401K more effectively, resulting in larger investment returns over the long-term. Using social media lead-generation strategies, AMSRIA has a unique opportunity to make business connections and grow their client base using social channels such as LinkedIn.

In order to do this, it will be necessary to first chart the course, define a marketing strategic plan and build a lead generation mechanism. AMSRIA will need to refine its brand messaging, allowing them to capture leads, and convert prospects into opportunities using lead nurturing strategies. Tactics may and should include, *LinkedIn Sponsored Updates*, *LinkedIn Display Ads*, *Sponsored InMail*, and LinkedIn group creation. Prospecting on LinkedIn works extremely well as long as it's done in a systematic way. LinkedIn's audience is one of the most affluent, educated, influential on the web.

*Sponsored Updates:* LinkedIn allows companies to put out paid promotions behind a status update. Promoted updates should include a visual and link to a gated asset. These promoted updates are seen by followers and targeted users outside of your follower network.

*LinkedIn Display Ads:* LinkedIn Ads give companies the opportunity to target their ideal audience in powerful ways. The data on a user's LinkedIn profile can particularly helpful for businesses. This information maps well to the lead data you want from users—such as job title, company, industry, location, and other demographics.

*Sponsored InMail:* To experience fast growth, companies need “outbound” marketing strategies where you can identify the ideal client and pursue them. B2B prospecting on LinkedIn combines the power of InMail, tracking, optimization and retargeting. Using an ideal prospect list based on your criteria, we recommend crafting a sequence of informative messages, a follow up message script and a sales-touch schedule.

Growing the business will also necessitate a formal set of after-action and retargeting processes which ‘elevate the experience’ to increase customer value over time; turning ‘ready-to-buy’ customers into raving fans that will stimulate referrals.

By developing a systematic sales funnel, AMSRIA can begin to capitalize on their experience in new ways, and reach new levels of success in the marketplace. A sales funnel strategy will also help AMSRIA



better control perceptions of who they are to potential clients by creating a foundation for both inbound and outbound marketing materials to evolve.

As strategists, designers and communication specialists we are uniquely trained to simultaneously consider human, technical, and business factors while employing innovative products, approaches, experiences, and technologies.

TOPO Digital Sea is pleased to present the following proposal that details how we could partner with AMSRIA to develop their marketing message for their target audience and build their sales qualified lead list respectively.

## **TOPO Digital Sea Background –**

TOPO Digital is both high-tech and high-touch. We drive strategies that put you at the bleeding edge of your industry and help you build your tribe.

We come from a branding background. As such, we put design, storytelling, and user experience at the very heart of everything we do. Our founders are "idea architects" working to remove clutter and enhance clarity through visual tools and visual thinking. In addition to our leadership and execution teams are made up of designers, strategists, and innovators. We combine left brain/right brain thinking to create a holistic vision for your brand.

Using our proprietary strategy lens process, we set you up for success by getting to the core of your brand's story and developing user personas that drive interaction across platforms. We dive into crucial KPIs for your business and develop marketing strategies that help you meet your sales conversion goals year after year.

## **Project Overview – Long-Term Vision**

Based on initial scoping conversations with AMSRIA team and our expertise in creating durable and effective brands for our clients, TOPO Digital Sea proposes the following:

### **Phase I: Landing Page – Micro-Website Design (Managemyretirement.com)**

Task:

- Web Logo for Leader

- Install WP theme & theme configuration
- Design Theme (set colors, custom CSS, spacing, copy)
- Layout for Client Page
- GDPR/Cookie Policy Setup/Configuration
- Required Disclosures/ Privacy Policy/Footer
- Additional Internal Page Setup (About/Services/Resources)
- Contact Page
- Link forms to CRM (if required)

## Phase II: LinkedIn, Campaign Setup & Maintenance

### Task

- PPTX/Presentation Template for gated video content
- LinkedIn Ad Campaign Setup
- LinkedIn Ad Marketing Collateral Creation
- LinkedIn Campaign Optimization

## Project Approach and Scope

Website Deliverables	Estimated Hours	Hourly Rate	Max Estimated Cost
Website Logo for Header	1.5-2	\$88.00	\$176.00
Install WP Theme & Theme Configuration	1.5-2	\$88.00	\$176.00
Theme Design	1.25-1.5	\$88.00	\$132.00
Home Page Layout	6-8	\$88.00	\$704.00
Client Page Layout	2-4	\$88.00	\$352.00
Additional Pages (Internal)	2-4	\$88.00	\$352.00
GDPR/Cookie Policy/Required Disclosures	4-6	\$88.00	\$528.00
Contact Page	1.5-2	\$88.00	\$176.00
Link Forms to CRM	1.5-2	\$88.00	\$176.00

Social Deliverables	Estimated Hours	Hourly Rate	Max Estimated Cost
PPTX Template	1.5-2	\$88.00	\$176.00
LinkedIn Ad Campaign Setup	3-5	\$88.00	\$440.00
LinkedIn Ad Collateral Creation	3-8	\$88.00	\$704.00
LinkedIn Campaign Optimization	8-14	\$88.00	\$1,232.00

## Investment and Payment Terms

TOPO Digital Sea will charge a flat rate of \$88.00/hour for full-service digital marketing and design services rendered.

1. Fees - Fees will reflect time spent and such factors as digital marketing, sales funnel development, website design, marketing collateral development, and client communications. The TOPO Digital Sea agent also takes into account urgency, inherent risks and the use of techniques, expertise, research and know-how developed.
2. Time and Materials Charging - "Time and materials charging" means that TOPO Digital Sea fees will be calculated on an hourly basis.
3. Fee Estimates - any estimate given by TOPO Digital Sea of any charge, whether for planning or any other purpose, is only an estimate and is not contractually binding.
4. Payment of Invoices - For time and materials charges, invoices will be issued weekly and it will be the responsibility of the Client to login to their Upwork client account, review hourly charges and submit payment for fulfilled orders. For other charging arrangements, invoices will be issued in accordance with the payment plan specified.
5. All charges will be specified in United States Dollars (USD) unless otherwise agreed.
6. TOPO Digital Sea may vary any time and materials fee rates by giving the client 30 days' written notice of the variation. Fee rates quoted relate to the provision of Services. Any fee amendment must be agreed by TOPO Digital Sea in writing.
7. Additional Charges – TOPO Digital Sea expressly agrees to the client deducting any additional charges or expenses incurred outside of its control, during the processing of any and all payments received for services rendered by TOPO Digital Sea, including but not limited to banking charges.



Note: These amounts do not include other direct costs including advertising expenditure, travel expenses and accommodations, printing or production costs, or additional production materials outside the scope of this proposal. Those costs will be charged to the client.

## Statement of Professional Terms & Policies

In addition to points of policy and terms indicated in our client specific proposals, the following applies to all TOPO Digital Sea Purchase Agreements.

### Security

TOPO Digital Sea will make reasonable efforts to maintain in strictest confidence any material, plans or policies divulged to us in the course of our relations with a client. These efforts will be equivalent to those exerted by TOPO Digital Sea to protect its own confidential interests.

### Design Rights

Any design, name, mark or other material in final form that is approved by a client and selected for its use will be the exclusive property of that client. All other designs, names, marks and materials developed in the course of the design project shall remain the property of TOPO Digital Sea. The client's ownership of legal rights in the final form of the item it selects is exclusive to the application(s) identified in the project brief and to the extent provided by applicable laws. Legal protection and appropriate registration a design, name, mark or other material developed by TOPO Digital Sea is the client's sole responsibility and should be done promptly after final approval to preserve such rights.

### Protection of Designs, Marks

The designs, names, marks and materials created by TOPO Digital Sea are believed not to infringe upon the rights of others. However, TOPO Digital Sea cannot warrant that its clients will be immune from claims of others due to the complexity of the laws and regulations governing such rights and the virtual impossibility of searching names and designs worldwide. It is recommended that clients consult their own legal counsel as to both availability and register-ability of the proposed designs, names, marks and other materials as soon as those items are finally approved. If client's availability search determines that the name or design created by TOPO Digital Sea and selected by client is not legally available, client shall have the right to go back to the other alternatives developed by TOPO Digital Sea and select another name or design for the client's exclusive use.

The cooperation of TOPO Digital Sea is available for the protection of these valuable property rights once the client has determined the proper method of legal protection.

### **Indemnification**

Consultant agrees, to the extent permitted by law, to indemnify and hold harmless but shall have no obligation to defend the Client and its officers, directors and employees (collectively “Client”) from and against liability for damages to the extent actually caused by the negligent acts, errors or omissions of Consultant and its subconsultants, or anyone for whom the Consultant is legally liable, in the performance of professional services under this Agreement.

Client agrees, to the extent permitted by law, to indemnify and hold harmless but shall have no obligation to defend the Consultant and its officers, directors, employees and subconsultants (collectively “Consultant”) from and against liability for damages to the actually extent caused by the negligent acts, errors or omissions of Client and its contractors, subcontractors, consultants, or anyone for whom Client is legally liable, in connection with this Agreement.

Neither Client nor Consultant shall be obligated to indemnify the other party in any manner whatsoever for the other party's own negligence or for the negligence of others.

### **General Assumptions**

The following general assumptions apply to this proposal:

1. The budget quoted and the services offered by TOPO Digital Sea remain firm for a period of (30) thirty days from the date of this proposal. TOPO Digital Sea reserves the right to amend or vary fees or service details on acceptances made beyond this point.
2. If there are quantities of materials that exceed the defined scope of work, e.g., additional concept boards, dummies or comprehensives must be supplied by TOPO Digital Sea for research or other purposes, there will be additional billing, based on approved estimates, to cover these costs.
3. While the estimated fees applied to each phase may change through the normal course of the project, the total approved budget will not be exceeded.
4. Should project guidelines by the client be changed while the project is underway, it may be necessary to modify the budget outlines.
5. If client management discontinues the project, the client will be billed for only those hours and expenses accrued on the project to date.
6. Project activities, legal reviews, due diligence, or other actions requiring use of counsel shall be the obligation of the customer.
7. TOPO Digital Sea may use the client’s logo and excerpts from the work as case studies in marketing materials and on our website.
8. The pricing in this Purchase Agreement is based upon the customer’s provision of certain materials, Subject Matter Experts and other project participants in a timely fashion to allow TOPO Digital Sea to execute its responsibilities. In the event that the customer does not provide such materials and personnel in a timely fashion, the parties shall negotiate in good faith an equitable adjustment in the pricing and/or other terms of this Purchase Agreement



### **Merger Clause**

This Agreement, together with the Non-Disclosure and Intellectual Property Rights Agreement in Exhibit A, contains the complete, full, and exclusive understanding of TOPO Digital Sea and Asset Management Strategies (“AMSRIA”) as to its subject matter and shall, on such date, supersede any prior agreement between Topo Digital Sea and Asset Management Strategies (“AMSRIA”). Any amendments to this Agreement shall be effective and binding on TOPO Digital Sea and Asset Management Strategies (“AMSRIA”) only if any such amendments are in writing and signed by both Parties.





## Proposal Approval

**OFFERED AND APPROVED** for TOPO Digital Sea

By: \_\_\_\_\_ (Signature)

\_\_\_\_\_ (Print Name)

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

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

**ACCEPTED AND APPROVED** for Asset Management Strategies (“AMSRIA”)

By: \_\_\_\_\_ (Signature)

\_\_\_\_\_ (Print Name)

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

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



## EXHIBIT A:

### NON-DISCLOSURE AND INTELLECTUAL PROPERTY RIGHTS AGREEMENT

This Agreement is between TOPO Digital Sea ("TOPO VS"); and, Asset Management Strategies (AMSRIA) ("CLIENT").

WHEREAS, TOPO VS has developed through substantial effort, research, time, and expense certain inventions, design concepts, methodologies, technical know-how, copyrightable material and trade secrets directed and related to digital agency marketing ideas, designs and collateral ("IDEAS and INFORMATION");

WHEREAS, TOPO VS desires to disclose the IDEAS and INFORMATION on a confidential basis to CLIENT solely for the purposes of evaluating the IDEAS and INFORMATION for possible future business arrangements; and

NOW, THEREFORE, in consideration of the mutual promises, covenants, and conditions contained herein, the sufficiency of which is hereby acknowledged, the parties agree as follows:

#### I. CONFIDENTIAL INFORMATION

A. TOPO VS agrees to disclose IDEAS and INFORMATION to CLIENT to facilitate possible future business dealings between the parties.

B. CLIENT agrees to receive such IDEAS and INFORMATION and to refrain from copying, disclosing, using, selling, or offering for sale any and all of said IDEAS and INFORMATION, other than at the request of TOPO VS, with the exceptions as provided in paragraph C herein. CLIENT agrees to keep confidential and refrain from disclosing any and all of the INFORMATION, and to take all necessary and reasonable steps to prevent unauthorized disclosure or use of any and all of the INFORMATION.

C. With respect to any IDEAS and INFORMATION known by CLIENT prior to the time of disclosure by TOPO VS that CLIENT believes to constitute the IDEAS and INFORMATION, or any portion thereof, CLIENT shall disclose to TOPO VS an adequate written description of the IDEAS and INFORMATION within fourteen (7) days of the disclosure by TOPO VS.

#### III. INTELLECTUAL PROPERTY

##### A. Title and Copyright Assignment

1. All products and results of TOPO VS's services rendered after a contract for services has been signed and the deposit paid (the "Work") are works made for hire. Prior to execution of such a contract, all intellectual property rights, including but not limited to title and copyright, belong to and remain with TOPO VS.

#### IV. DAMAGES AND SPECIFIC PERFORMANCE

A. CLIENT agrees that should CLIENT breach any of the promises contained in this Agreement that TOPO VS would suffer irreparable harm and TOPO VS would be without adequate remedy at law and that TOPO VS may obtain injunctive relief, including specific performance of the Agreement, as well as monetary award for damages suffered by TOPO VS for CLIENT'S breach of this Agreement.



**IX. CHOICE OF LAW** This Agreement shall be governed by, construed, and enforced in accordance with the laws of the District of Columbia. Any dispute involving the terms or conditions of this Agreement shall be brought in the **District of Columbia** court of competent subject matter jurisdiction therein. Each of the parties hereby submits to the personal jurisdiction of said court.

IN WITNESS WHEREOF, the parties have executed this agreement as of the latest date indicated below.

**TOPO Mixed Media, DBA  
TOPO Digital Sea**

**Asset Management Strategies (AMSRIA)**

(Signature)

(Signature)

(Date)

(Date)