



S I O R[®]

SOCIETY OF INDUSTRIAL
AND OFFICE REALTORS[®]

**marketing
services
request for
proposal**

February 11, 2022



elevating energy, excellence and engagement for SIOR

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With a new team of energized leaders, SIOR is on a quest to evolve the organization and sustain and grow its role as the leading professional commercial and industrial real estate association. With more than 3,600 members in more than 722 cities in 45 countries, SIOR represents today's most knowledgeable, experienced and successful commercial real estate brokerage specialists.

The SIOR designation is a beacon of excellence, ethics and experience to corporate real estate executives, brokers, agents, lenders and other real estate professionals. This respected community of office and industrial specialists relies on SIOR for leadership, connections, dealmaking, professional development and next-level thinking to lead the society into the future.

And the future is bright.

CSG Creative is known for excellence and embodies the best of association and conference marketing strategy, branding and planning, and combines that expertise with a leading-edge creative and design agency. The result is a turnkey marketing solution for associations that is unlike any other.

CSG has decades of experience working with growth-focused associations like SIOR to achieve similar goals and priorities. Our proven processes, talented team and keen understanding of your challenges enable us to hit the ground running and enter the partnership with decades of collective experience — ready to make smart recommendations to achieve your near- and long-term objectives. We will bring innovative insights, fresh perspectives, cutting-edge strategies and valuable guidance to further elevate your marketing campaigns, brand and position your profit centers for continued growth.

your priorities. our solutions.

The SIOR Executive Team and Board of Directors is looking to partner with an experienced marketing agency to provide comprehensive services to help energize the organization and communicate a clear direction, sense of excitement and vitality. Discussions have included but not been limited to the following items:

- **Create a new look and strengthen messaging that portrays SIOR in a best-in-class format**
- **Assess current tagline to consider possible revision or replacement**
- **Energize recruitment initiatives with a high-energy branding campaign**
- **Demonstrate to members and industry that SIOR is the most significant player in its marketplace for dealmaking**
- **Enhance brand guidelines for local chapters to follow**
- **Develop a strategy and execution for social media, direct mail, ad placement and media relations**
- **Identify ways to use resources wisely and evaluate where marketing efforts can be improved to produce greater return for the association**

Bringing an agency like CSG to the table allows the SIOR team to focus on supporting the society's strategic initiatives, growing and nurturing membership and providing the highest level of service to the SIORs.

As your partner, the CSG team will be focused on understanding the needs of the SIORs, the office and industrial real estate landscape, trends and member sentiments so we can make the smartest and informed recommendations. We'll review your marketing efforts more holistically, find gaps in messaging, identify opportunities to increase impact and optimize cross-promotional opportunities.

Our experience and best practices enable us to increase efficiency, identify efforts where we need to push harder or invest more deeply, and make the recommendations that will support your strategic goals.

why csg?

CSG was built from a passion for facilitating powerful business connections. The entire team fundamentally believes in the critical importance of associations and their mission of supporting and activating strong networks of industry professionals. Trade events, conferences and meetings have a unique ability to grow businesses, advance industries and develop contacts that lead to successful and rewarding partnerships. Our deep commitment to and understanding of the importance and the impact of bringing communities together enable us to develop strategic marketing programs that are not only effective in getting results, but also elevate brands in the communities they serve, as well as related peripheral markets.

our goal

Our goal is to become an extension of your team — a partner who does all the heavy lifting and makes you shine.

our passion

Our passion for marketing, commitment to excellence and expertise of our team ensure your success.

our mission

Our mission is to be the premier strategic marketing and creative agency that provides award-winning branding, integrated marketing solutions and unparalleled service to associations and show organizers.

a trusted partner to industry-leading associations



CSG works nearly exclusively with association and event organizers.

- | | | |
|---|--|--|
| AdvaMed | Diving Equipment and Marketing Association | National School Boards Association |
| American Association for Justice | FABTECH | National Shooting Sports Foundation |
| American Association of School Administrators | Food Processing Suppliers Association | National Telecommunications Association |
| American Chemical Society | Global Pet Expo | Sign Research Foundation |
| American Fuel and Petrochemical Manufacturers | IAAPA, The Global Association for the Attractions Industry | Society of Naval Architects and Marine Engineers |
| American Gear Manufacturers Association | International Sign Association | Solid Waste Association of North America |
| American Pet Products Association | National Alliance on Mental Illness | SpaceCom Expo |
| Argentum | National Association of Broadcasters | Water Environment Federation |
| Crohn's and Colitis Congress | National Association of Chemical Distributors | Women in Cable Television |
| | National Association of Convenience Stores | |

what we'll do for you:

1

We'll make your life easier. We'll bring the great ideas and take care of the details while you focus on your already full plate of responsibilities.

2

We'll be your brand steward. We'll make sure that the messaging and presentation of the SIOR brand is consistent and on point across all channels.

3

We'll be your partner. And being a partner means that we'll do what it takes to get it done. Period.

4

We'll keep our eye on your goal. Always. We're committed to tracking and planning our strategic efforts to get results.

5

We'll be responsible and respectful of your time and your budget. We promise to deliver and execute your campaigns and projects on time and on budget.

known for award-winning brands and campaigns



66
IAEE Art
of the Show
Awards

116
Graphic
Design
USA Awards

23
Davey
Awards

8 Association Trends
2 Excite Awards
1 American Business
Media Award
1 Excel Award

comprehensive capabilities to meet all of your needs

brand development

- Branding, themes and show identity
- Logo design and development
- Brand activations
- Onsite experiences

design

- Graphic design
- Print and digital design
- Copywriting
- Advertising
- Show guides
- Publications

strategy

- Audience acquisition strategy
- Marketing plan execution and support
- Membership recruitment and retention campaigns
- Persona and journey mapping
- Direct mail strategy management
- Partnerships and affiliate relationships
- List research and data segmentation

digital, web and interactive

- Website design, development and programming
- Interactive engagement
- Game development
- Motion graphics and animation
- Geofencing/IP targeting
- Retargeting campaigns
- Authorized Feathr "power user"
- Native advertising and content marketing
- HTML5

media and advertising

- Barters and trade negotiations
- Media placements
- Media planning

virtual event solutions

Creative

- Virtual identity updates and creative refresh
- Branded virtual backgrounds for speakers and attendees
- PowerPoint templates
- Virtual environment "signage"

Create Dynamic Video Content Development & Production

- Pre-event promotion
- Opening videos
- Speaker introductions
- How-to tutorials explaining the structure of the event
- Keynote & session videos
- Session transitions

Develop Digital Advertising Strategies

- Craft messaging strategy for all target audiences
- Plan and execute strategic campaigns that will drive attendance to your events and reach new audiences that may not have attended your in-person event
- Create an interactive microsite or digital brochure highlighting the features of your virtual event

international marketing

- Campaign strategies and audience development
- ITA Trade Event Partnership Program
- Commercial Service partner recruitment and delegation organization

public relations

- Press release writing and distribution
- Media relations
- Social content and strategies
- Onsite pressroom management and media relations
- Monitoring, tracking and measurement of media coverage

social

- Paid advertising and promotional campaigns
- Onsite activations and engagement
- Influencer programs
- Content development and organic content strategies

video

- Creative direction
- Videography and production services
- Interviews
- Editing
- Animation and motion graphics

research

- Focus groups
- Post-show surveys
- Attitudinal segmentation and persona development

our legacy of success will lead SIOR into the future

SIOR is looking to develop strategic marketing initiatives and brand strategies to heighten awareness, impact and achieve membership growth and diversification. SIOR believes that with stronger messaging emphasizing the society's value, smarter creative strategies and effective positioning to the right audiences, there is real opportunity for growth.

While branding, membership and event goals and objectives require similar scopes of work and resources in terms of execution, each priority will employ unique strategies and tactics to achieve the goals set forth.

CSG works with associations every day to achieve similar goals and objectives with purpose, vision and results-focused strategies. Our work encompasses all the areas where you seek support and expertise.

We are known for exceptional:

- **Brand development and brand strategy**
- **Competitive landscape analysis and brand positioning**
- **Messaging and positioning to increase relevance to core and target markets**
- **Multi-channel strategic marketing plans and tactical execution for membership recruitment and audience acquisition campaigns**
- **Digital campaigns to amplify messages and drive conversions**
- **Content strategies and multimedia engagement**
- **Database development, lead generation and lead nurturing**
- **Traditional direct response marketing initiatives, including print advertising, direct mail and brand activations**

Most importantly, we are known for our ability to be a seamless extension of our clients' teams — thinking and acting as if we were part of the organization, proven by our steadfast commitment to achieving goals and laser focus on success.

The following pages demonstrate our experience as it relates to achieving your goals and priorities. They showcase our ability to elevate brands and create breakthrough strategies, digital campaigns, ad concepts, themes and unique tactics to effectively drive membership and market conventions and events. The case studies and examples prove that we can concept, create, plan, develop and deliver marketing and creative services that get RESULTS.

1

campaign planning and execution

CSG has a thoughtful and strategic method to successfully develop and implement comprehensive, omni-channel marketing campaigns. The foundation of our plans always begins with research to understand market conditions and emerging trends, audiences and industry personas, new opportunities for growth, registration trends and behaviors, successful strategies, competitors, threats, and near- and long-term goals. All of these data points are essential to understand the customer journey and develop plans and tactical recommendations that introduce the right messaging at the right time, in the right channel and to the right audiences.

IAAPA, The Global Association for the Attractions Industry

IAAPA relies on CSG to provide consistency for their global brand across membership, programs and events. We work with their personnel in the United States, Asia, Latin America and Europe as a brand steward and strategic partner. We advise and execute on print campaigns, digital campaigns and grassroots efforts. We also serve as the hub for all media buys and barbers.

Projects

- Association branding and corporate materials
- Membership acquisition
- Membership retention
- Attendee acquisition for four events per year
- Exhibitor and sponsorship sales support



AASA, The School Superintendents Association

AASA has no internal marketing department. CSG manages all marketing outreach, ensuring that each program reaches the appropriate audience with an on-brand tone, message, creative and offer. We can keep an eye on saturation and spread the messages out among the marketing channels based on timing and audience. We also are able to cross-promote and test unique offers based on how integrated we are with the AASA team. We've presented to the Leadership Committee and participated in staff retreats, the only vendor/partner given such trusted access.

Projects

- Association branding and corporate materials
- Membership acquisition
- Membership retention
- Attendee acquisition for two events
- Program marketing



National Association of Chemical Distributors

Each year, CSG runs a strategic planning session for NACD leadership, staff and partners to evaluate the prior year's successes and challenges and set new goals for the upcoming year. We integrate metrics into every project so that we can prioritize the resources allocated to each project/department. A big priority for NACD is repurposing content across departments and channels. Since we are fully integrated into the organization, CSG is able to identify those opportunities within the marketing plan and new opportunities as they arise throughout the year.

Projects

- Membership acquisition
- New member welcome and retention
- Education and program marketing
- Research reports
- Attendee acquisition for three events per year
- Digital annual report
- Partnership with PR firm

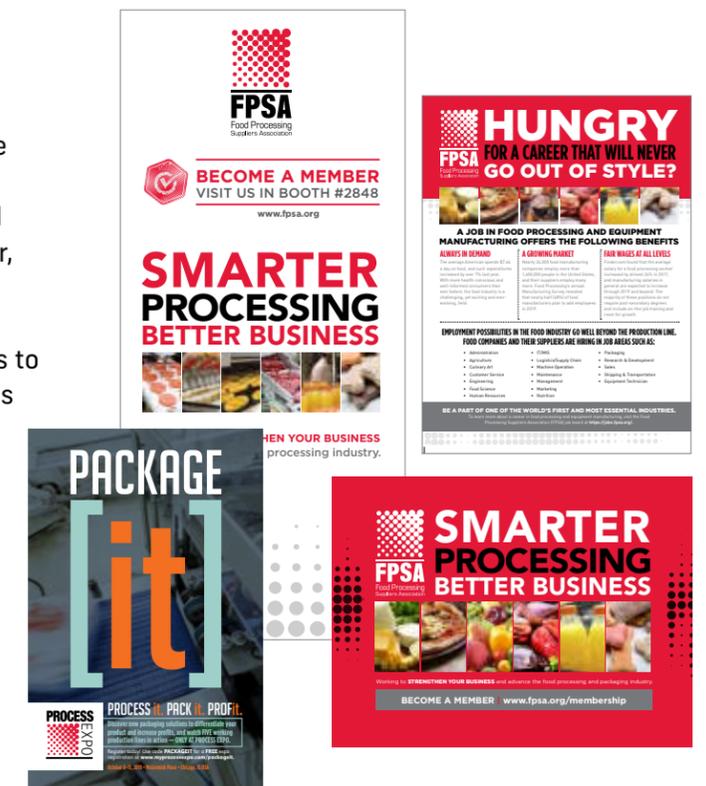


Food Processing Suppliers Association

FPSA has a very small staff (seven people) and relies on CSG to provide strategic plans, messaging, creative and execution for membership and trade show campaigns. In addition to managing the multi-channel marketing campaigns, we also manage their PR vendor, international marketing and social media consultant. Paige Cardwell regularly attends board meetings alongside the FPSA staff. This unique access allows us to keep abreast of customer trends and the opportunities facing the food processing industry.

Projects

- Membership acquisition
- Membership retention
- Attendee acquisition for a biennial event
- Exhibitor and sponsorship sales support





challenge

PROCESS EXPO — the nation’s largest trade show for the food and beverage processing and packaging industry — has historical roots in the meat processing industry. Over the years, it has evolved to include the entire food and beverage industry, but many attendees and exhibitors still perceived it as “the meat show.”

solution

To combat the perception that PROCESS EXPO is a “meat processing show,” CSG presented creative and messaging to highlight the horizontal nature of the event. We communicated that PROCESS EXPO caters to all segments of the food and beverage industry and is the place to find crossover solutions.

The flexibility of the 2019 “PROCESS[it], PACKAGE[it], [PROFit]” campaign allowed CSG to create targeted micro campaigns with industry-specific creative to highlight show floor activities, education sessions and networking events that were relevant to each of the audience segments.

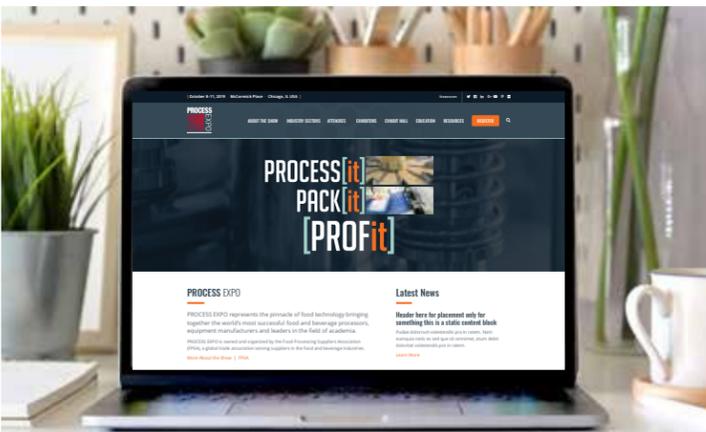
To support the horizontal campaign, CSG developed a robust multi-channel attendee promotional campaign that included direct mail, targeted email, telemarketing, digital advertising, print advertising and paid social media. The PROCESS EXPO website also featured dedicated content for each of the sectors. CSG collaborated with 57 media partners to reach prospects in each of the key industry segments,

using a mix of targeted banner ads, print ads, newsletters, eblasts, webinars and social media.

Additionally, the 2019 campaign focused heavily on reaching out to exhibitors to promote PROCESS EXPO as a horizontal show, encouraging them to highlight and display equipment and technology offerings for all the segments they cater to. Exhibitor outreach tactics included targeted direct mail pieces, emails and monthly exhibitor newsletters.

results

Registration data showed a significant increase — 20%–30% — in attendance from the prepared foods, bakery, dairy and beverage sectors, over PROCESS EXPO 2017. Additionally, there were significant marketing resources dedicated to the pet food segment, and registration for this audience increased by 197% over 2017.



challenge

We’ve seen tremendous growth in IAAPA Attractions Expo over the first three years working on the account — most notably a 34% increase in buyer attendance and a 24% increase in overall attendance. Though some agencies might consider such stats a win, at CSG, we’re always looking to deliver more to our clients, especially ones with whom we have worked for a long time.

For the development of IAAPA’s 2017 campaign, we set out to push ourselves creatively and strategically. We wanted a campaign that would not only reflect the trends impacting the attractions industry as a whole but also speak to the energy and excitement that are unique to this fun industry.

solution

As the global attraction’s industry’s premier event, the show is home to representatives from all types of attractions, from large theme parks to small mini-golf operations, zoos, science centers and everything in between.

To get a clear picture of what trends were impacting the industry, we proactively sought input from members of IAAPA’s communications

team, specifically the writers and editors of the association’s monthly magazine. They were able to provide a “frontline” perspective of what is impacting the industry now and what trends are coming down the pipeline.

Members of our design team worked together to develop a design trends presentation that showcased the hottest colors, type treatments and design elements. When we shared this presentation with the IAAPA team, they were able to let us know what trends resonated with them and their industry and steered us away from trends they knew wouldn’t work.

results

During our discovery process, we learned that a key trend currently impacting the attractions industry as a whole is guests’ demand for more custom/personalized experiences. This industry trend paired well with corresponding design trends, including the use of custom-made fonts and pairing photos with illustrations. It was here, at the intersection of industry and design trends, that the theme of “Creation Nation” was born.

By taking the time up front to gather insights from team members and to conduct range-finding, we were able to set expectations for the creative reveal, which meant that the approval process went much faster and that we were able to roll out the campaign much earlier.



2

digital marketing and communications

No marketing campaign is complete without a full integration of digital tactics. CSG has an entire digital team to design and execute digital strategies built to pull loyal alumni, prior attendees and prospects through the marketing funnel into conversion. Our strategies are developed to deliver messages that build awareness, drive interest and engagement, encourage sharing, and, most importantly, generate conversions. Our most successful digital marketing campaigns have leveraged tactics including:

- Display and programmatic advertising
- IP/geofencing location-based advertising
- Retargeting and remarketing
- Paid social campaigns
- Lead generation campaigns
- InMail campaigns
- Content marketing and native advertising

CSG's team of experts will review the strategies and recommendations in place, past performance, platforms, advertising refresh cadence, and specific campaigns related to KPIs to make recommendations to improve performance and ROI.

CASE STUDY AACC

TARGETED ADVERTISING

challenge

In June 2019, the American Association of Clinical Chemistry (AACC) found itself behind its registration pacing goal for the Annual Scientific Meeting & Clinical Lab Expo. With only 5 weeks until its event, AACC came to CSG for strategic recommendations to quickly reach and convert more prospects while growing overall attendance.

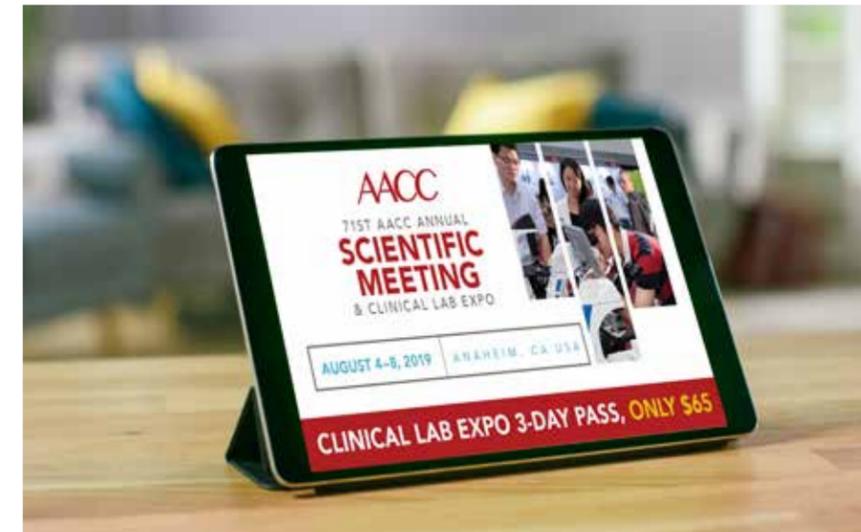
solution

CSG worked closely with AACC to investigate the reasons why registration had slowed despite satisfactory digital marketing campaign performance in awareness and registration. They discovered that location and cost were major prohibitors for prospective attendees and concluded that the burden and cost of travel was the primary deterrent to registration. With only one month to implement, CSG developed a geotargeted strategy for remarketing and social media that focused on the

West Coast of the United States. The goal was to gain attendees in proximity to the Anaheim, CA-based event. CSG also developed messaging to emphasize the cost-effective registration options that AACC offered — such as the Clinical Lab Expo Pass that granted 3-day access to the Expo at an affordable price (under \$100).

results

In just one month, the combination of value-specific messaging and geotargeted ads created more than 400,000 impressions. Registrations attributed to remarketing doubled, and layering in paid social media ads increased that again by 25%. Despite the low price point of the Expo Pass, the investment in geotargeted media spend captured an ROI of 300%.



INTEGRATED DIGITAL



challenge

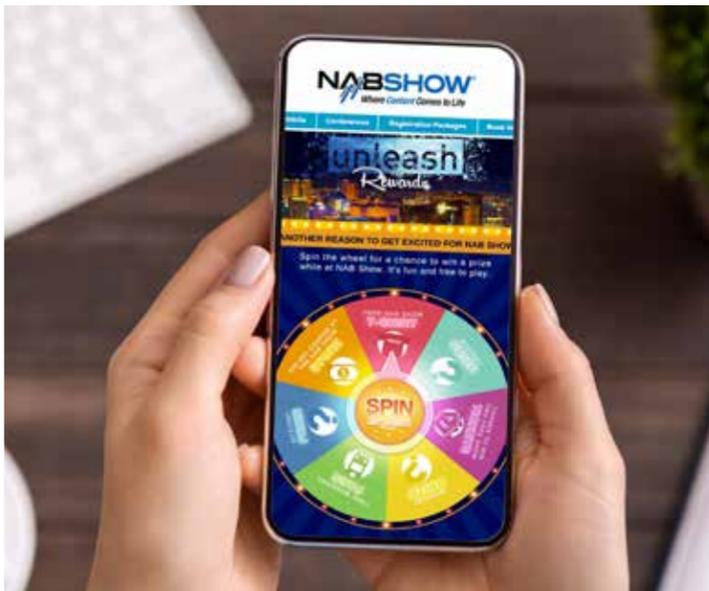
When CSG was conducting discovery meetings with internal team members and numerous professional services consultants, we found that the marketing efforts for NAB Show were very siloed. There was very little connectivity between groups. Each team operated through the narrow lens of its unique contribution to the overall customer experience. Such siloes led to weak analytics, unanswered questions regarding user behavior and missed opportunities to build relationships with consumers.

solution

CSG started with an audit of all the digital tactics in place at the time as well as the content used to engage prospects. Then, with the overall marketing objectives in mind, we looked at where we could make immediate connections for better roadmaps and records of how people were finding us, interacting with us and eventually converting to attendees/advocates. For example, we took basic web banner ads that linked to the show's homepage and transformed them into an engaging and trackable experience. We simplified the creative message, used a unique URL for tracking, linked the ads to a custom landing page related to the profile interest of a publication's readership, added a superpixel to the page, and then served retargeted customized banner ads with varied messages that matched the interests of that audience.

results

Working with NAB Show, we have continued to deepen and grow the digital experience. We always have a finger on the pulse of what's next and on how technology is changing how we receive, consume, distribute and prioritize information in our personal and professional lives. For NAB Show and many of our clients, it has resulted in truly integrated digital experiences.



3

website design, UX and content management

CSG has earned top awards for our web design and development. We are pros at creating dynamic, easy-to-navigate, easy-to-convert websites for our clients' events. We understand the content that drives decision-making and how to develop site architectures that facilitate quick and easy navigation to enhance UX and UI. CSG works exclusively in the WordPress platform due to its flexible design capabilities and user-friendly CMS.

When it comes to outbound digital campaigns, we understand the importance of visually connecting our campaigns to the experience on the website, the hub of all marketing efforts. We drive digital campaigns to target specific landing pages or existing content to elevate value and need to engage. We make sure that all web experiences have clear and visible calls to action that get the user to the conversion point quickly.

In addition to design and development, CSG implements robust SEO into our websites. We carefully evaluate selected pages on the site and work with the best tools to monitor and evaluate search terms and priorities, ensuring that content is appropriately tagged, positioned and updated to increase organic search.

WEBSITE INTEGRATION



challenge

The MedTech Conference wanted to move the dial in 2019 to increase attendance and firmly establish the conference as the leading event in the medical device industry. A major obstacle to achieving this goal was the conference website, which lacked the sophistication of functionality and design needed to entice new audiences.

solution

CSG built a new, modern website for The MedTech Conference that would appeal to the next generation of attendees. The redesign project included enhancing the website's functionality, streamlining its navigation, and improving the user experience on both desktop and mobile. By moving to WordPress, CSG delivered a new website that would be easy to update and accommodate changing conference needs. It provided prominent placement for ongoing promotions and allowed for content sections that could be customized to different attendee groups. The new website launched in February 2019 with a dramatic,

animated homepage slider that showcased new brand creative, also designed by CSG.

CSG then developed and executed a strategic digital marketing plan that supported the new conference website. Furthermore, digital marketing was a key component of the overall strategy to grow paid registrations. The robust 2019 digital marketing plan addressed all stages of the marketing funnel from awareness through retention to target past attendees and attract new prospects. It included SEM, display, retargeting, geofencing and lead gen tactics across Google and social channels. SEO was audited on an ongoing basis to ensure first-page search engine results. Digital tactics were used strategically in 2019 to create a savvy online presence for the conference and ultimately convert registrations.

results

Attendance at The MedTech Conference increased by over 10% in 2019, and digital conversions represented close to 30% of total attendance. CSG monitored and optimized all digital campaigns on a weekly basis to ensure CTRs and digital conversion metrics remained strong. The digital marketing plan resulted in over 15MM impressions and 45K clicks. With a cost per conversion as low as \$4 for key tactics, the digital marketing plan managed by CSG delivered a very strong ROI for the conference team.



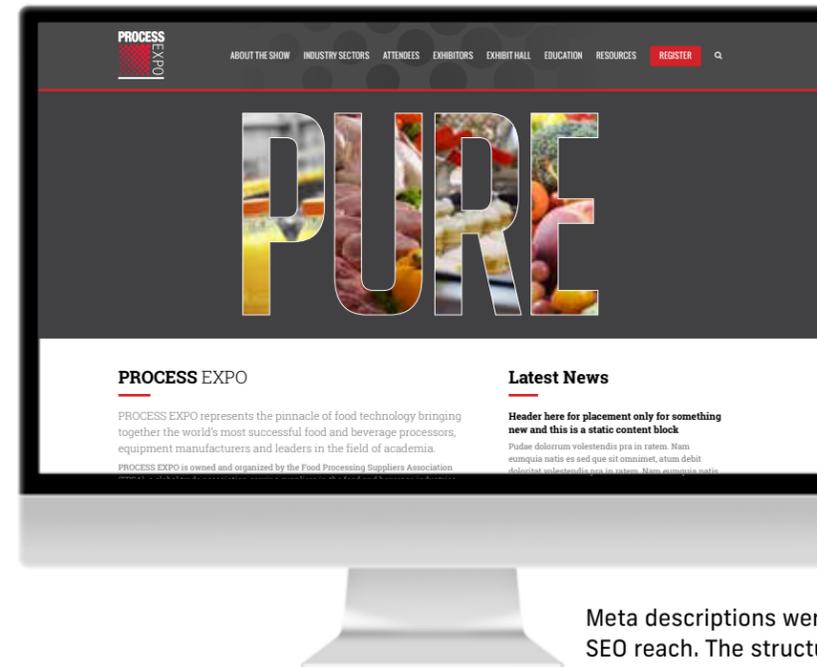
THE MEDTECH CONFERENCE
 SEPT. 23-25, 2019
 BOSTON, MA

DON'T WAIT TO REGISTER
 Save \$200 through 7/26!

REGISTER NOW



WEB DESIGN/SEO/UX



challenge

When CSG began the engagement with PROCESS EXPO in 2016 it was clear that the show needed an aggressive turnaround strategy. Suffering from a weak 2015 event, we needed to improve perceptions of this biennial event in order to position PROCESS EXPO as an innovation leader, to resell booths to past exhibitors and attract brand-new companies to exhibit, and to increase awareness among and registrations from an expanded target audience.

solution

After executing an event rebrand, CSG knew the PROCESS EXPO website needed to be completely revamped. All marketing materials point to the website as the primary source of news and information, so the user experience has to be modern, engaging and straightforward. Our experienced digital team improved the visual representation of the event and also transformed the navigation and page layouts.

In addition, we optimized the new site to increase traffic via search engines. We installed a Yoast plugin, which included a readability and keyword analysis. The site's content was reviewed and edited for SEO effectiveness, including headers, names of pages and more.

Meta descriptions were updated and redirects set up to increase SEO reach. The structure of the content was reordered in the navigation so that critical information was reachable in the first or second levels of the site. Finally, a number of technical factors were evaluated, such as site speed and responsiveness, inbound links, and other factors that boost a site's search status.

results

Total sessions increased 124%, total visitors increased 123% and total page views increased 282% over the previous campaign. Of the top 20 pages visited, 7 included new and enhanced pages targeting industry-specific audiences and recorded a total of 54,826 page views, a 294% increase over 2015.

A new interactive map recorded 4,428 hits from the redirect used to track it. This map was not posted until later in the show cycle and was used to increase retention as well as attract new prospects. And the "Reserve a Booth" page went from 253 page views in 2015 to 5,430 in 2017. The main exhibitor page went from 9,786 to 22,504 page views.

4

video & photography

If a picture says a thousand words, a video says a million. CSG loves digital storytelling and understands that audiences expect to have an immersive video experience that portrays the show experience. Working with our production team in Hollywood, CSG brainstorms storyboards and creative direction to shoot and curate video that is not only compelling but also engages viewers, builds the brand and puts forth the right narrative.

Our video production goes well beyond the traditional talking heads to content that evokes real emotion and the irreplaceable value of face-to-face connections found only at our clients' events. We then leverage shorter edits of our videos for social and digital advertising.

We also incorporate dynamic motion graphics to help tell our stories. These high-energy and revealing pieces are especially effective for unveiling new brands, messaging or show promotions.

Finally, we know how to direct photography to capture the images that will complement our marketing efforts. Not known to leave anything to chance, we work side-by-side to art-direct shoots and stage shots to make sure we have what we need.

CASE STUDY

IAAPA

STORYTELLING

challenge

Video is a key component to any digital marketing strategy. But how do you make your videos stand out from the crowd and showcase what your brand is all about in a short timeframe?

For IAAPA Expo, it was important for our videos to showcase the complete Expo experience and break the mold of a "typical trade show video," which, for many other agencies, includes B-roll, a mashup of testimonials . . . and more B-roll.



With the launch of the International Association of Amusement Parks and Attractions (IAAPA) new association and show brand, we had the added challenge of incorporating the brand story into the videos. IAAPA challenged us to showcase the emotion and joy associated with their brand.

solution

When thinking about the IAAPA Expo experience, we realized that we had three perspectives to share: an exhibitor, a repeat attendee and a first-time attendee.

We worked closely with IAAPA to identify three individuals that fit within those target profiles. Once the individuals were selected, we called each person to talk about our plan for filming, sample questions and the goal for the videos.

After filming each individual experiencing the show, our video team created a visual profile for each individual and their unique IAAPA Expo story.

results

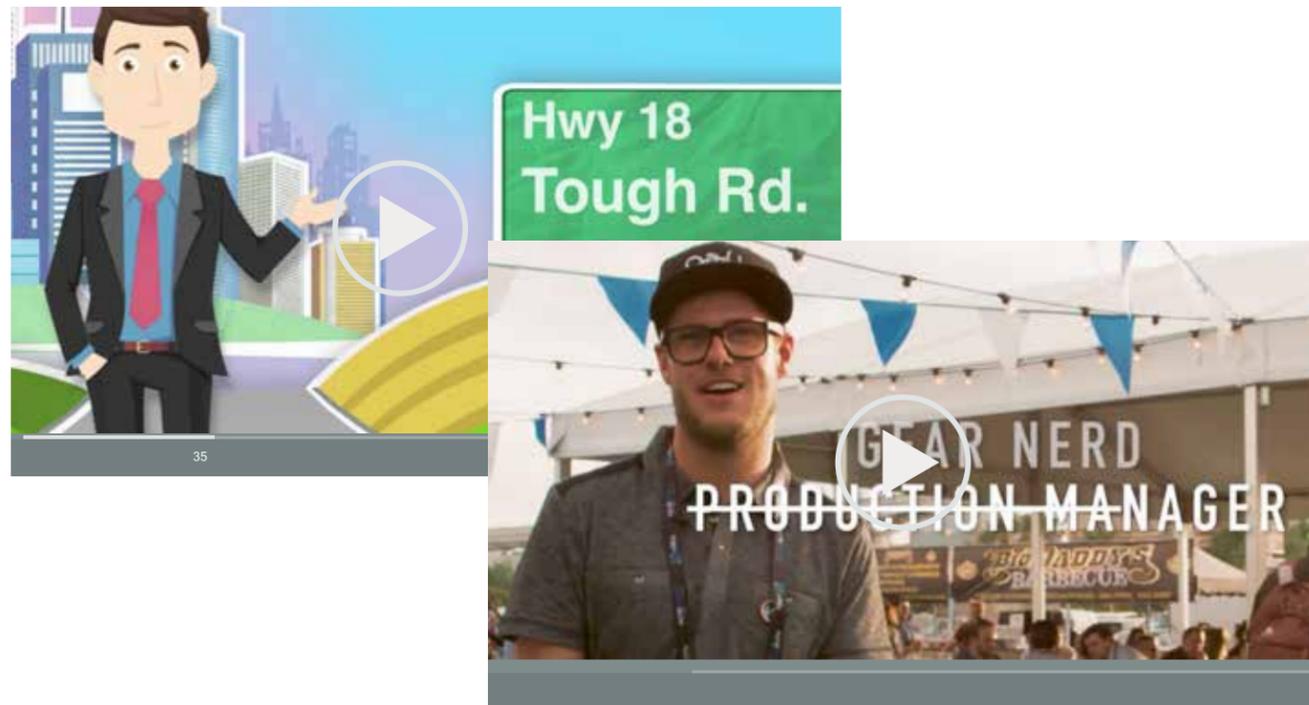
We launched each video at carefully planned intervals within the campaign.

First, we debuted the Exhibitor Video during a final push for exhibit sales over email and all social channels. On Facebook alone, it received 2,000+ views, 12 shares and 54 responses.

Next, the Repeat Attendee Video was launched with registration, receiving 12,000 views, 7 shares and 51 responses. It was then edited to serve in our video pre-roll advertisement campaign on YouTube. During this campaign, the video's VTR (view thru rate) was strong at 71%. This ranks well above a benchmark of 51% and showcases a high level of engagement with our content.

Finally, the First-Time Attendee Video debuted on social media prior to the Early Bird Deadline, receiving 21,000 views, 12 shares and 51 responses on Facebook.

Overall, we have been very pleased with the level of engagement and the videos themselves. Many IAAPA members and staff have told us that they get "goosebumps" watching them, as it helps them remember what is special about their industry.



5

content strategy and management

Associations are inherently full of great content sources through publications, industry resources, advocacy initiatives, member profiles and, of course, their events. CSG works closely with our clients to develop content strategies that support SEO. This keeps the website fresh and dynamic, driving traffic from a broader audience, increasing scroll depth and time on site, and supporting marketing initiatives with content relevant to the value propositions presented to drive membership and show attendance.

We have created powerful vlogs and traditional blogs and developed highly successful native advertising that has increased traffic by tens of thousands to our clients' websites.

We also embrace the importance of cross-channel content promotion. That postcard you put in the mail? Let's repurpose it for a social media graphic. Let's repackage some of the content to support association initiatives post-event. The research report you just published? Can we serve it up digitally as a white paper to drive lead generation? By removing the silos from your marketing approach, you'll win with a more robust and integrated content strategy and the investment you make in content development will have a stronger ROI by spanning across multiple channels and increasing impressions.

NATIVE ADVERTISING

challenge

AASA's National Conference on Education is the most comprehensive professional development and networking event for more than 3,000 school superintendents and administrators. Most attendees are members of AASA, and the client was looking for a strategy to reach new audiences and to expand awareness and participation of non-members. In addition, we wanted to position AASA as a thought leader by creating content that would be further supported by the education offered during the two-day event.

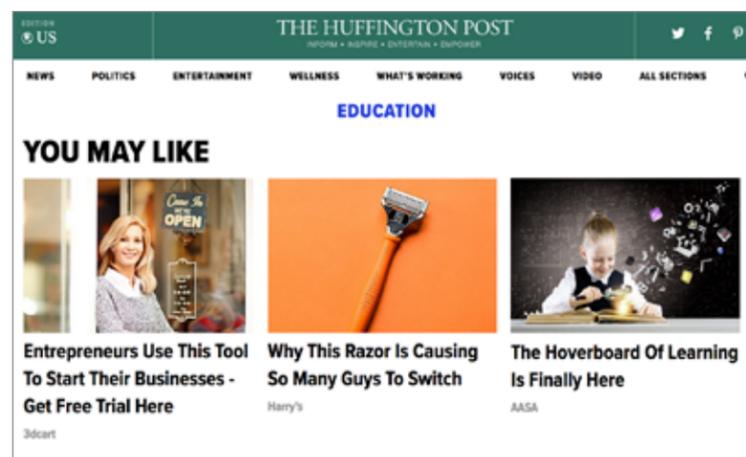
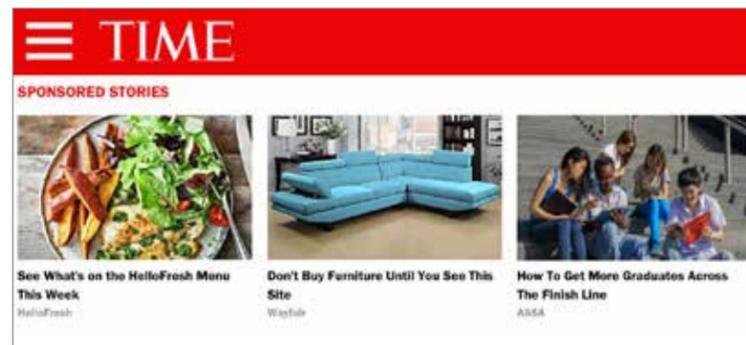
solution

After researching many platforms and tactics, we decided to test a content marketing strategy with AASA. First, we identified hot trends and wrote a custom, medium-length article about each trend, providing an objective and thought-provoking viewpoint on each topic. We paid to place those articles on mainstream press, pushing them out through content streams to reach specific audiences where they are on the web. Because we were not necessarily focused on specific industry or trade sites, we were able to profile and model the prospect audience and serve them the paid content on CNN, The Today Show, Bloomberg, etc. The articles linked through to the NCE website, and each new website visitor was subsequently retargeted with digital ads promoting AASA as a valuable content source. We ran the campaign for 30 days.

results

The results were outstanding. From a pure revenue perspective, the real-time conversions to paid registrations more than paid for the entire content marketing campaign. We were able to trace 453 hours that users spent in front of the NCE brand, reading content. We measured over 16,000 clicks and nearly 14,000,000 impressions. Another highlight was the

social media engagement linked to this campaign. Based on known behavior, we expected negligible results crossing into social media channels; however, we tracked 90+ social engagements. Altogether, we were able to earn the client more than 25,000 brand engagements (article views, native clicks, social actions and conversions). The majority of this activity was likely from non-members, which contributed to a 20% increase in non-member registration.



ORGANIC SOCIAL

challenge

The National Association of Convenience Stores (NACS) hosts an annual conference and exposition for convenience and fuel retailing professionals. Before the event, NACS wanted to maximize their reach to potential attendees through as many channels as possible. These channels ranged from print pieces to digital ads to social media platforms. It was important to NACS that they approach these outreach tools strategically and efficiently, that all efforts were integrated and that they optimized their resources.

solution

NACS teamed up with CSG to create paid and organic social media content for their target channels. The organic social media strategy was designed to engage existing followers as well as to extend organic reach across Facebook, Twitter and LinkedIn. The paid social media strategy was intended to reach audiences that were not as engaged with the association but fit the profile of potential association members and NACS Show attendees. The two campaigns were designed to operate independent of each other while promoting the NACS Show through a cohesive voice and messaging.

results

Quantifiable results of the campaign were monitored throughout its execution to improve existing strategy. The copy, content, voice and imagery; tags and links; and posting time of each piece of content were carefully considered and examined to ensure that each channel was optimized. During the months preceding the NACS

Show, CSG's organic social media content campaign caused a steady increase of traffic from all social media channels to event website. At the end of both the organic and the paid social media campaigns, paid social media content had reached 227,469 views (higher than anticipated) and was ultimately successful in spreading awareness with 639,425 impressions. The paid social media campaign saw an overall return on investment of 1,719%.





public relations approach

In partnership with:



FWV is an award-winning public relations firm with years of experience in the real estate & development industry providing services including communications strategy and message positioning, public affairs, media relations, thought-leadership, social media content and crisis communications. We have also worked for many other professional services in the financial and legal sectors. This experience combined with our work on a variety of membership and credentialing associations, strongly and uniquely positions us to be a passionate partner for SIOR.

Through this work, we have developed a strong network of connections in the commercial real estate space, working directly with brokers, developers, architects, design and engineering firms, consultants, and investors. We understand how the industry works and have the right relationships to elevate understanding of the meaning behind an SIOR and awareness of SIOs in the industrial and office real estate market.

FWV is committed to helping our clients change minds and influence behavior through the use of integrated research, public relations, public affairs, advertising and marketing strategies.

Our process starts by learning as much as we can about your organization and your specific media and communications goals. We leverage the key insights from those learnings to create earned media strategies that distinctively connect with your target audiences. From there, we use a variety of tried and true, but also out-of-the-box, media strategies and tactics to position SIOR at the center of media conversations and coverage. We'll start by uncovering media opportunities in national, top tier, trade and local publications in select markets, using a variety of story angles within the real estate and commercial office sector.

The Approach:

Brand Insights: Learn as much as we can about the brand, its services and their target audiences.

Research: Look outside the brand, into competitors, relevant news, trends and potential activations.

Concepting: Use insights and research to define a clear strategy. Identify the stories that will set you apart.

Integration: Align earned media efforts with owned media as well as creative.

Execution: Bring the concepts to life through media and influencer relations, partnerships, events and more.

Measure & Improve: Measure effectiveness and results, and apply learnings to constantly improve.

FWV believes a proactive media relations approach will play a key role in ensuring SIOR is positioned properly and gets its rightful share of voice.

FWV's ongoing media relations activities would include:

- Development and refinement of key messaging
- Drafting and distribution of press releases, pitches, fact sheets, etc.
- Ongoing proactive media outreach and monitoring
- Rapid-response pitching to react to relevant news items in real time
- Interview vetting and prep
- Monitoring editorial calendars and one-off pitching opportunities
- Reporting, regular status calls and/or in-person meetings
- Daily account management and support

Media Relations / Event Planning / Advertising

- Organized and implemented groundbreaking events for key developments
- Developed press materials and conducted media relations surrounding groundbreaking events
- Created on-site signage, such as groundbreaking banners for key developments
- Developed email marketing template and distributed communication to key stakeholders
- Top coverage includes: WRAL, WNCN, WTVD, TWC News Raleigh, Triangle Business Journal, The News & Observer



In May of 2019, FWV was retained by Ryan Cohen, founder and former CEO of online pet retail giant Chewy.com, to raise the public profile of the 34-year-old entrepreneur and investor. Cohen had recently left Chewy following the sale of the company to PetSmart for \$3.35 billion in cash, a record at the time for an e-commerce acquisition.

FWV has helped Cohen fine-tune his personal narrative, including the business principles that guided him as he defied the odds to compete against Amazon and his market outlook as the largest individual shareholder in Apple. To prepare for media interactions, FWV works with Cohen to establish up front what the potential controversial opinions are and provide supporting rationale, as well as to anticipate difficult/confrontational questions and rehearse prepared responses. Cohen also stays ahead of potential negative feedback by taking ownership of stated opinions, often by posting on social media in anticipation of public commentary.

Key appearances and features on/in top-tier media coordinated by FWV include Harvard Business Review, WSJ, Business Insider, Yahoo Finance, Entrepreneur, Marketwatch, TechCrunch, Bloomberg, Cheddar, Forbes, CNBC and Inc.



780M+ Media Impressions

meet your team

Our talented team is comprised of marketing strategists, researchers, account planners, exceptional designers, digital and interactive pros, and production gurus who are all experts in developing, planning and executing award-winning marketing campaigns and brand development programs. Our goal is to be a seamless extension of your marketing team. We want to earn “a seat at the table” by proving that we are a critical partner whose insights and contributions are integral to your success.

our goal is to be a seamless extension of your team.

The following individuals will lead the SIOR team and direct the creative and marketing strategies to achieve your goals.

Paige Cardwell

President
Chief Strategist



Paige Cardwell has marketed, promoted, produced and created successful association shows and event marketing campaigns for 25 years. Whether attracting 300 people or more than 100,000, Paige's unique blend of strategic initiatives, innovative approach and creative savvy offers each client insightful and smart

solutions to marketing and branding challenges intended to grow audiences and increase revenue. As President of CSG Creative, Paige leads her team and oversees the marketing, strategy and branding initiatives for all CSG clients. Paige is involved with each account, large or small, and eagerly shares her insights and best practices developed through years of success in the events business and association marketplace.

Paige has been a featured speaker at the Major American Trade Show Organizers (MATSO) Annual Meeting, ASAE's Marketing and Membership Conference, the International Association of Exposition and Events (IAEE), and on the Board of the Association for Women in Events.

Paige holds a BA in communications from the Annenberg School of the University of Pennsylvania in Philadelphia, PA. Paige is a member of IAEE, the American Society of Association Executives, and the Association for Women in Events.

Carrie Schultz

Vice President, Strategy and Client Service
Lead Strategist



Carrie is responsible for the strategic planning, management and execution of client marketing programs designed to increase membership retention and acquisition, as well as attendance and exposition sales for trade shows and conferences. Her work is results-driven and focused on getting the strongest return-on-

investment for all marketing efforts. Her expertise includes creation of strategic and tactical marketing plans, budgets and timelines; direct mail; copywriting and copyediting; list research and analysis; and Web development. She also is integrally involved in the brand development and digital strategy for our clients. Carrie leads a team of savvy account executives and is committed to unparalleled service and total client satisfaction.

She holds a BA in history from Emory University in Atlanta, GA. Carrie is a member of IAEE, and has participated in the Bell Leadership Institute training curriculum.

Megan Hall

Vice President, Creative
Lead Creative



Megan's passion for design is the cornerstone for the success of CSG. Her personal creative philosophy perfectly complements the overarching goals of CSG: delivering great design that gets great results. Fanatical about graphic design since she was a teenager and unwavering in her career goals

ever since, Megan delivers a unique blend of strategic, managerial and creative skills that provides our clients with unparalleled creative solutions to their toughest marketing challenges. She oversees creative development and project execution, using her vast experience and keen eye to ensure that all projects meet the highest standards of quality, are technically flawless and meet all objectives as put forth by the client.

Under her leadership, CSG's award-winning design team consistently exceeds our clients' expectations with the creativity, variety and thoughtfulness of the campaigns we execute. Prior to CSG, Megan developed her skills in design and marketing on projects ranging from the development of corporate identity, branding, direct mail and promotional collateral to designs for large financial institutions and print-on-demand formatting for a variety of clients in Baltimore, MD, and Washington, DC. Megan earned a BFA in graphic design and photography from the University of Maryland Baltimore County in Baltimore, MD.

Wendy McCool Lewis

Director, Digital and Account Strategy



Wendy's enthusiasm for all things marketing is reflected in her broad communications skill set. As a 20+ year military spouse, Wendy epitomizes the agile personality that helps make marketing successful. And when it comes to digital, she's done it! Branding, strategic planning, campaign creation, digital

advertising, website and digital asset development, copywriting, social media integration and negotiating media — you name it. Wendy's vast experience implementing successful consumer and B2B marketing campaigns helps her clients achieve positive return on investment.

Wendy has an MBA in marketing and international business. She has worked for multiple advertising agencies and internal marketing teams for both commercial corporations and international nonprofits. She is always eager to learn her clients' businesses and search for innovative communication channels.

meet your team

Amy Hollister
Brand Strategist



Amy Hollister has successfully led a number of prominent consumer brands in her 25+ year brand management and marketing strategy career. Her passion is uncovering consumer insights and identifying the intersection between those consumer unmet needs and an organization's strengths and benefits, to position businesses and brands for relevance and growth. She has worked in brand management, brand strategy, and marketing for Nestle USA, Reynolds Consumer Products, Capital One, and Hamilton Beach Brands.

Amy holds a BA in International Relations from the University of Pennsylvania in Philadelphia, PA and an MBA from the Haas School of Business at UC Berkeley.

Courtney Lopes
Art Director



This Northern Virginia native brings 17 years of design experience and an impressive repertoire of impactful designs and creative logos to her position.

Prior to CSG, Courtney was the sole designer at an Anheuser-Busch distributor, designing marketing materials and point of sale for their Northern Virginia market. From beer

labels to show guides, there's no project she won't tackle! Courtney brings a meticulous eye to the design team, and her love of typography helps knock out rebranding projects.

Courtney earned her BFA from East Carolina University. Go Pirates! When she's not designing, Courtney loves breaking down the barre, running 1/2 marathons with her twin sister, and enjoying pancake Sundays with her family.

Peter Cajamarca
Digital Marketing Manager



Peter brings 5+ years of experience in digital marketing strategy, optimization, and reporting to the CSG team.

Peter loves analyzing data and using those insights to make strategic recommendations. A background in science has honed Peter's analytical skills.

Additionally, Peter brings client-friendly experience to the table. At his previous role, Peter worked directly with clients in the hospitality industry. His high level of commitment to great service means client calls, reporting analysis, check-ins and more are all focused on helping clients understand the information and feel confident in moving forward.

Peter is deeply passionate about digital marketing because it gives a powerful platform to anyone who wants to achieve their marketing goals through a connected world. The targeting tools and levers give everyone a real opportunity for success. Managing these levers and making smart data-driven decisions is what fuels a successful campaign.

In his free time, Peter enjoys spending time with his dog, Icey, whether it is playing fetch, going on walks, hiking — but mostly playing fetch. Peter also is an avid soccer fan, and his favorite teams are D.C. United and AC Milan.

Michelle Lee
Multichannel Marketing Specialist



A true INFJ on the Myers-Briggs personality indicator, Michelle believes that teamwork and passion are the keys to everything.

At CSG Creative, she supports the bustling account team in delivering award-winning marketing campaigns with attention to detail and project management.

Prior to joining CSG, Michelle was the marketing and customer service manager for a busy IT firm, and kept her CEO sane by providing exceptional service and executing customer-driven marketing plans.

Outside of the office Michelle enjoys yoga, figuring out what "clean eating" means, and running on short, merciful trails.

Outfitted with a BS in marketing from University of Maryland and allured by the siren song of web analytics, Michelle leverages her curiosity to create amazing client experiences.

Lara Lee
Digital Designer



Lara is a designer who loves to create memorable, meaningful digital designs that engage viewers and enhance usability.

Her expertise spans graphic and web design, front-end web development, print production, DSLR photography, and vector illustration.

Lara has been designing for print and web for over eight years. She started her creative career as a graphic designer at Rottman Creative Group, and eventually started her own business as a freelance designer for small businesses, nonprofits, and entrepreneurs. Today, Lara thrives on creating new digital designs completely from scratch. She can even hand-code entire websites without any WYSIWYGs.

Lara graduated from the University of Maryland with a BS in digital media & web technology: front-end web design & development, as well as a BFA. In addition to designing, Lara enjoys showing off her cockatiel named Bullet, running cross country, and clean eating.

Katie Emig
Digital Content Specialist



From creating content, managing email campaigns, analyzing metrics, and spotting opportunities for growth across all channels, Katie can do it all.

Katie's passion for marketing first blossomed when she decided to take a marketing elective course during her senior year of high school. It quickly became her favorite class, and she was thrilled when she learned she

could make a career out of two of her passions: writing and social media.

She is always ready to dive headfirst into new challenges, as she feels it's the best way to learn new things. This is partly due to her experience working with smaller companies, where wearing multiple hats and taking on different responsibilities without hesitation is a common part of the job.

Prior to CSG, Katie was a content marketer for a startup company based in Annapolis, MD. During her time there, she increased social media engagement across all platforms and played a huge part in helping with the company's rebrand in 2021. She holds a B.A. in English from the University of Delaware.



CSG Creative was an integral part of my organization's planning and execution for not just our trade show but also membership. Their work went far beyond the marketing we initially contracted them for and they became the strategic partner that we hoped they would. The CSG team consistently looked for new opportunities for our business and positioned the organization and its events in the best possible light, which helped us to exceed our goals and set an ever-higher bar. In short, our collaboration with CSG helped to set new horizons for FPSA and, more importantly, found ways to get there.

**Andrew Drennan, Senior Vice President
Food Processing Suppliers Association/
PROCESS EXPO**



13%
growth in buyer registrations

24.3%
increase in international attendance

The average number of leads per exhibitor **increased 20%**

Website visits increased 153% and page views increased 319%

PROCESS EXPO 2017

meet your team

public relations team

Jenny Pilewski

Executive Vice President



Jenny leads a team of integrated marketing and strategy efforts, including public and media relations on behalf of some of the agency's most important government and municipality, economic development, residential and commercial real estate clients. This work puts her on the front lines of partnering with some of the nation's largest real estate

companies, and influential developers, brokers, and real estate attorneys all with an unwavering focus on cultivating mutually beneficial partnerships and local and national awareness and growth.

Morgan Lang

Account Supervisor
Day-to-Day Lead



Morgan joined the FWV team in 2019, bringing proven experience in executing integrated campaigns for B2B and B2C clients — including construction projects through work on Acuity Brands, a major commercial, industrial and residential lighting company, and Enlighted, a Silicon Valley-based commercial IoT company.

Morgan spearheads trade and consumer accounts at FWV, while serving as the day-to-day lead on several clients in the real estate space including Clancy & Theys Construction Company and Turnbridge Equities. Her primary responsibilities include account management and strategic direction, campaign development and execution, and maintaining client relationships and satisfaction. Morgan graduated from University of North Carolina Wilmington with dual B.A. degrees in communication studies and French.

David Gwyn

President



On the executive leadership team, David would also have a direct hand in the strategy, counsel, and daily working operations of the account. His relationships within the sector are significant, as he carries a great deal of experience working for and with real estate development companies (Dominion Realty Partners), commercial real estate services

companies (CBRE), retail, office and residential management companies (Kane Realty, Crosland), commercial builders (Williams Realty, Ashland Construction, Vanguard) and general contractors (Clancy & Theys). His ability to generate ideas would greatly aid in SIOR's ability to generate positive awareness and overall buzz.

project management tool

We are committed to providing top-notch customer service to our clients. We want to work how you want us to work. In some cases, this means using a project management tool to help move projects through the production pipeline.

While we have a robust internal project management tool, Current Track, it is an agency-based program and not suitable for client-facing workflow and project management. Our clients have routinely asked us to work in Basecamp, Asana, Smartsheets, and other platforms and we will adapt to your needs and preferences.

scope of work and cost estimates

Billing and Rate: CSG bills our clients monthly for services performed and projects completed the preceding calendar month. All invoices are due net 30 days. CSG uses a blended rate of \$150/hour.

2022 Strategic Marketing Services, Planning, Management and Execution Support for Events and Membership Marketing and Communications:

CSG will work with SIOR to develop clear and measurable goals and objectives for acquisition, retention and new market opportunities for all association programs and events. Our seasoned and senior team members will apply their vast knowledge of association and event marketing strategies to create efficiencies while adding value above and beyond what would be possible with internal resources. For 2022, our focus will be on:

- **CREate 360 Fall Conference Marketing**
- **SIOR Bootcamp Marketing**
- **New Member Recruitment Campaign**
- **Member Retention Campaign**
- **SIOR to Industry Brand Awareness Campaign**

We will work with your functional teams to assess their needs and specific goals and incorporate the feedback to develop strategic marketing plans that satisfy the objectives.

For events, CSG will serve as your strategic marketing partner to build and execute attendee and exhibitor marketing campaigns for CREate and the Bootcamp series. We will work closely with the SIOR team to offer new and enhanced strategic marketing ideas and recommendations to elevate the creativity and impact of the campaigns. In addition, the agency will develop copy and content for all campaign marketing materials.

For membership, CSG will develop and implement multi-channel top-of-funnel plans to heighten awareness and underscore value of the SIOR designation to target audiences and follow through to bottom-of-the-funnel conversion tactics supporting retention and renewal strategies. The agency will develop copy and content for all campaign marketing materials. Campaign strategies and timelines may be timed around important dates and milestones or focused on specific verticals defined in SIOR's goals.

As your strategic marketing partner, CSG will provide:

- **Marketing strategy development, project management and tactical execution for multichannel campaigns for association events and programs**
- **Development of campaign and promotional timelines**
- **Collateral development, copywriting, fulfillment and coordination**
- **Campaign management, client meetings, committee meetings and other related SIOR meetings, as needed**
- **Digital campaign strategy**
- **Benchmark reporting and metrics (not including digital campaigns)**
- **Budget tracking and management**
- **Attendance at SIOR events and meetings (travel expenses billed back at cost)**
- **Email editorial calendar development and copywriting (up to two emails per month)**
- **List research, acquisition, coding and tracking of all lists**
- **Response rate analysis for all tactics**
- **Digital media planning, recommendations and consultation**
- **Website copy development**

Our professional service fees represent an average of 45-50 hours a month for association programs and events at the blended rate of \$150/hour. The fee will be billed monthly and spread over the term of the contract. With the anticipated start date of March 1, 2022, the term would run through December 31, 2022

2022 Marketing Services Support and Execution: \$7,200/month

scope of work and cost estimates

2022 Campaign Core Creative and Themes

Good design is the art of creating great results. We have a core team of creatively unique designers who have been handpicked for their individual strengths. At CSG, we don't have a "look"; we have creatives with their own personal style. This gives our clients a wide variety of design and graphic styles to evaluate.

Our process starts with research and strategy, then moves to ideation and concept development. After initial concepts are developed, the internal team convenes to review and refine concepts to make sure they support the approved creative strategy. We will apply this proven process to develop powerful concepts that have breakthrough and resonance in the office and industrial real estate market.

CSG will develop a unique theme and core creative concept to promote CREate as well as a campaign theme and concept to serve as the foundation for membership awareness and recruitment campaigns. Concepts will be shown in multiple applications including digital banner ads, email template, print ad, signage, etc.

2022 CREate Core Creative Development: \$6,500

2022 Membership Campaign Core Creative Development: \$6,500

2022 SIOR to Industry Campaign Concept: \$4,500

2022 SEO Review and Digital Advertising Platform Management

No marketing campaign is complete without full integration of digital tactics. In fact, several of our clients lead efforts with digital platforms while layering in other marketing channels as needed. Regardless of your approach, CSG is well-versed in the digital strategies that work best to build awareness of your association, programs and events.

SEO Review

We begin with an SEO review of your website. Search Engine Optimization (SEO) is the practice of increasing the quantity and quality of traffic to your website through organic, or unpaid, search engine results. It's getting the right people — and a lot of them — to find you naturally online so you don't have to pay for them to come to you. Our SEO review focuses on ensuring on-page elements are following best practices to increase your site rank so your website can compete for web traffic. Fee includes an analysis of 8-10 key strategic web pages, on-page SEO strategies, site metadata, content development and review, and keyword development.

Project Fee: \$4,500

2022 Digital Platform Management

A variety of digital marketing strategies will be integrated into the marketing plans for CREate and membership. We will develop a holistic strategy that integrates a combination of tactics across a few platforms (typically Google Search, Google Display, Facebook and others). Each campaign will have a specific audience, message/offer and KPI.

We'll use a variety of platforms to execute tactics that may include site retargeting, native advertising, event geofencing, location geofencing, and paid ads across social and display networks.

All digital strategies developed for SIOR campaigns will be turnkey and fully integrated into the marketing plan, and will include:

- Researching the right channels
- Media planning and purchasing
- Audience modeling
- Copywriting for unique messages
- Creative development
- Testing and evaluation during the campaign
- Tracking and reporting results

Note: The pricing offered is for management only. It does not include the cost for the media insertions or the design of additional creative assets that may be needed to support the tactic. CSG does not mark up or charge commissions on ad insertions. We believe it is more transparent to charge separately for our time to set up, manage, monitor and report against the recommended tactics.

Platform Management: \$750 per platform, per month, per campaign.

Includes monthly reporting. Additional reporting cadence will increase monthly fee.

Other digital fees:

SEM Copywriting: \$850 per keyword set

PR Services

The following budget considerations are designed as a starting point for discussions, and final recommendations will be made following your review of this proposal and receipt of feedback.

Media relations, thought leadership development, messaging strategy, media list management, etc.

45 hours per month based on a blended agency rate of \$200/hr: \$9,000–\$10,000

ESTIMATED COST CENTERS 2022 (MARCH – DECEMBER 2022)

Strategic planning and execution: \$72,000

Core Creative Concepting: \$17,500

Digital Campaign Management: \$22,500

Graphic Design Services (collateral, DM, ads): \$36,000

Digital Design Services (web and digital advertising units): \$28,750

Other Misc.: \$15,000

Estimated Agency Fees*: \$191,750

Estimated PR Fees: \$90,000

**Preliminary estimate based on SOW presented in RFP. Estimates are scalable based on actual budget and resources available.*

scope of work and cost estimates

2023 Strategic Marketing Services, Planning, Management and Execution Support for Events and Association Marketing and Communications:

All services listed for 2022 plus support on TransACT, larger brand awareness campaign planning, and global association marketing and communications strategy, planning and execution. Estimate 55-60 hours per month.

The term would run from January 1, 2023, through December 31, 2023: \$8,700/month*

**CSG and SIOR will have the opportunity to re-evaluate this fee structure based on actual hours spent in 2022 and may adjust up or down accordingly.*

2023: Association Brand Development and Messaging

CSG will work with SIOR to complete a global assessment of the association brand and make recommendations to unify creative and messaging among marketing channels. Our thoughtful process focuses on:

- **Understanding:** All the key characteristics of the organization, members, programs and services
- **Clarifying:** Brand perception, competitive advantage, distinct attributes, and points of differentiation

- **Positioning:** The core promise and articulating that effectively to the correct target markets
- **Reviewing:** All member touchpoints and communication vehicles to review messaging and how the association is currently presented across different departments and platforms (email, promotional packages, brochures, videos, website, training promotions, PR, etc.)

Part I. Learning more about SIOR

Our team will start the brand development process with a comprehensive review of all existing stakeholder and other member sentiment studies and state-of-the-industry reports. Through this process, we will seek to understand:

- Primary audiences, influencers, competitors
- Core competencies — what the organization excels at providing
- Points of risk — perceived weaknesses or common complaints
- Areas where the brand is best known and where it needs more recognition
- Discussion of internal culture
- Competitive white spaces and other emerging opportunities

Part II. Exploring Success Drivers

The best way to build an authentic brand is to build it from the inside out. Our process works to identify the core beliefs and competencies that drive your organization. We seek to get a 360-degree perspective of the organization by interviewing a range of leaders and other key stakeholders.

We will conduct 8-10 interview sessions with senior management and other stakeholders. The sessions will explore views regarding:

- SIOR's purpose and point of view about its programs, services, and the experience it delivers
- SIOR's core competencies — what the organization excels at doing, and what is the impact
- SIOR's primary points of differentiation from competitors
- A discussion of the values that drive the brand
- Future opportunities to enhance the experience or expand your reach
- The impact of SIOR on those it serves — why your work is important to the audiences and the larger office and industrial real estate industry
- SIOR's vision for the future — where the organization aspires to position itself long-term

Part III. Bringing the Brand to Life

Once the research has been completed, we will synthesize the findings and develop a summary of internal and external findings with a focus on insights about the organization's distinguishing characteristics, emerging opportunities, and points of leverage. This part will include:

Brand Conviction: A brief description of the primary brand position and value of the organization to clarify direction and guide messaging. This serves as the brand's nucleus.

Purpose Statement: Like an "elevator speech," the Purpose Statement is an aspirational expression of the driving force behind the organization and why it matters.

Brand Storylines: These guides to messaging describe key themes that are important to the communication of the brand and its value across all expressions of the brand. SIOR's commitment to DEI will be a focus in our messaging strategy.

Brand Manifesto: The Brand Manifesto is an inspirational statement that drives pride in what the organization stands for and an understanding of why it matters.

Through this purposeful exploration, CSG will refresh the brand, tagline and brand extensions to update and energize the look and feel of the association. This process will lay the groundwork for a fresh advertising and marketing campaign to commence Q1 2023.

The deliverables will include:

- Research findings
- Brand strategy
- Messaging platforms
- Update to visual identity
- Update to brand guidelines

Fee for Brand Development process and updates to creative and visual identity: \$42,500

scope of work and cost estimates

Other 2023 Marketing and Communication Services:

Organic Social

CSG will develop an editorial calendar that keeps relevant content flowing no fewer than three times per week, continuing to position SIOR as a thought leader, integrating promotional copy specifically about your events and programs as appropriate. We will develop an overall content calendar and then create posts in advance for your team to review and approve.

We will also manage all postings, recommend which content to boost and where to integrate paid advertising to achieve your specified goals. CSG will also source/create images to support posts. Different images, posting days/times and tones of voice will be tested for maximum effectiveness, and progress reporting will be provided.

Organic Social Campaign Planning and Posting: \$1,200/per month

Organic Social Graphics (4 custom graphics per month): \$800 per month

Association Communication Email Support

SIOR would also like to consider support with the production and distribution of their weekly email, quarterly email and chapter communications. Our digital specialist has extensive experience in a variety of email platforms, including Hubspot.

She will work with your teams to compile content, provide copy editing, layout the text and images, and provide test emails to the internal team. Once trained on your internal processes, she can also deploy the emails to your designated member list provided by SIOR.

Email Production, Coding and Distribution: \$750 per email

Email Copywriting Support: \$500 per email

Video & Photography

Our video team is an extension of our in-house designers and account service personnel. Together, they work with the client to bring engaging video footage to life on screen. Whether it's motion graphics, animation or live-captured footage, the team offers a varied skill set based on your digital storytelling needs.

Video Production and Editing: \$6,500 – \$8,500 per minute of completed video

ESTIMATED COST CENTERS 2023 (JANUARY – DECEMBER 2023)

Strategic Planning and Execution: \$104,400

Brand Development: \$42,500

Core Creative Concepting (events and membership): \$24,000

Digital Campaign Management: \$49,500

Graphic Design Services (collateral, DM, ads): \$45,000

Digital Design Services (web and digital advertising units): \$32,750

Social Media: \$28,800

Video Production: \$30,000

Other Misc.: \$15,000

Estimated Agency Fees*: \$371,950

Estimated PR Fees: \$108,000

**Preliminary estimate based on SOW presented in RFP. Estimates are scalable based on actual budget and resources available.*

Graphic Design and Creative Fees for Marketing and Sales Collateral: 2022/2023 Programs

Our full intake and discovery process including feedback and direction from SIOR stakeholders will inform our recommended plans and tactics. Some of these tactics may be included in those plans, and other tactics may be recommended that are separate from this list. Sample pricing for creative development is listed here in "menu format" for budgeting purposes. Copywriting services are included in the monthly management fees.

Print Advertising Design Fees

Full page advertisement: \$2,500

Additional targeted FP ad versions for verticals: \$1,750/version

Spread advertisement: \$3,000

Print ad production fulfillment (resizes and distribution to media partners as needed): \$300/ad

Print Collateral Design Fees

Postcard: \$1,750

Flyer/PDF, 2 pages: \$2,500

Small mailer/membership brochure (6 pages): \$3,500

Highlights brochure (8 pages): \$5,500

Unique format/loyalty mailer/high-end invitation (6–8 pages; unique format): \$6,500

Large brochure (12–16 pages): \$10,500

Sales or sponsorship prospectus (8–12 pages): \$8,500

Digital Design Fees

Web site reskin with new creative (home and internal pages): \$5,500

Email templates: \$1,750/per template

Custom designed content emails: \$1,250/email

E-cards (animated digital postcards): \$1,250

Banner ad suites (11-4 sizes, per campaign): \$2,500 to be used for geofencing, retargeting, SEM, Google Display, etc.; \$1,250 per suite for refreshed creative or messaging

Social media ads: \$225–\$500/ad

Social media skins (per skin): \$350

Web sliders (per slider): \$350

Mobile app graphics: \$1,500

Digital toolkits (for chapters, SIOR designation promotion): \$5,500

Motion graphics and animations/HTML5: \$5,500–\$10,500

The preceding estimates do not include cost for printing, postage, fulfillment, translations, photography, illustrations or other direct expenses incurred to support the creative and tactical execution. All estimates are subject to change if the scope of the project changes in size, shape or quantity. All conference and educational content provided to CSG must be in a .doc or .txt format.

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