#### NEW JERSEY SECURE CHOICE SAVINGS PROGRAM

## **BOARD MEETING** FRIDAY, MAY 5, 2023

**TO:** Members and Associates of the New Jersey Secure Choice Savings Program

**FROM:** Todd M. Hassler, Executive Director

**DATE:** May 4, 2023

The next meeting of the New Jersey Secure Choice Savings Program will be held on Friday, May 5, 2023. The meeting will be conducted virtually via Zoom and commence at 10:00 am. You may join the meeting with a link obtained at the New Jersey Secure Choice Savings Program website: <a href="https://nj.gov/treasury/securechoiceprogram/">https://nj.gov/treasury/securechoiceprogram/</a>.

Enclosed in this packet is a copy of the agenda and meeting materials.

#### **AGENDA**

- 1. Call to Order
- 2. Open Public Meetings Act Statement
- 3. Roll Call
- 4. Program Updates from the Executive Director
- 5. Matters requiring Board Action
  - A. Resolution to Approve the Minutes of the February 10, 2023 Board Meeting
  - **B.** Resolution Authorizing the Award of a Contract for a Marketing Services Firm
- **6.** Public Comment (if any)
- 7. Other Business (if any)
- **8.** Meeting Adjournment

We look forward to speaking with you on **Friday**, **May 5th.** Please call if you have any questions prior to the meeting.

**Enclosures** 

#### AGENDA ITEM A

## RESOLUTION OF THE NEW JERSEY SECURE CHOICE SAVINGS PROGRAM BOARD APPROVING THE MINUTES OF THE MEETING HELD ON FEBRUARY 10, 2023

**WHEREAS**, Article III, Section 2 of the By-Laws of the New Jersey Secure Choice Savings Program Board (the "Board") provides that the minutes of actions taken at meetings of the Board be approved by the Board.

**NOW, THEREFORE, BE IT RESOLVED,** that the minutes taken at the meeting of February 10, 2023, of the New Jersey Secure Choice Savings Program Board, attached hereto as **Exhibit A**, are hereby approved.

#### [EXHIBIT A]

#### NEW JERSEY SECURE CHOICE SAVINGS BOARD

#### Minutes of the Meeting February 10, 2023

Minutes of the Board meeting of the New Jersey Secure Choice Savings Board (the "Board") held via Zoom on Friday, February 10, 2023 at 10:05AM Eastern Standard Time.

#### MEMBERS OF THE BOARD IN ATTENDANCE

Todd Hassler, Executive Director, New Jersey Secure Choice Savings Program Andrea Spalla, Assistant Treasurer of the State of New Jersey Lynn Azarchi, ex-officio Member; Director of the Office of Management and Budget Kevin Walsh, ex-officio Member; Acting State Comptroller Luis O. De La Hoz, public Member

#### ADDITIONAL ATTENDEES

Victoria Nilsson, Deputy Attorney General Amanda Truppa, Treasury, Division of Administration LaShera Kirk, Treasury, Division of Administration Jamera Sirmans, Governor's Authorities Unit

#### MEMBERS OF THE BOARD NOT IN ATTENDANCE

Evelyn Liebman, Vice Chair, public Member Charles Hall Jr., public Member

Chair Designee Spalla presided over the meeting and LaShera Kirk, Treasury, Division of Administration, kept the minutes.

Chair Designee Spalla called the meeting to order at 10:05AM. Chair Designee Spalla introduced herself and made the following statement:

I wish to announce that adequate notice of this meeting was provided in accordance with the Open Public Meetings Act. Notice of today's meeting was filed with the Secretary of State; distributed by press release to at least two daily newspapers in New Jersey; and also posted on the bulletin board for the Secretary of State.

If there are any members of the public in attendance who wish to speak at this meeting, please note that the Board will open the floor for public comment before we adjourn.

Chair Designee Spalla turned the meeting over to Executive Director, Todd Hassler to provide a status update on the Board's launch of the New Jersey Secure Choice Savings Program:

As you may be aware the formal implementation of the Program is a multiphase process. As the Program is evolving we will be preparing an ongoing timeline with action items and deliverable reports to share at the Board meetings. This is to share and track the progress of the Program's implementation as we move forward.

For the first progress update, pursuant to the September 9, 2022 Board resolution, the Division of Law has issued a RFQ for Special Tax Counsel. The RFQ was posted on the Secure Choice website, Division of Administration's website, and the Attorney General's website on January 31<sup>st</sup> with a closing date of March 16<sup>th</sup>.

The need for a marketing consultant has been identified as well. The consultant will be focused on brand creation, website development and public awareness campaigns that will be conducted during the implementation phase of the Program. Existing vendors will be considered to fill this operational need. This summary is for informational purposes only, the Board is not being asked to take any action at this time.

The need for an implementation consultant has also been identified to assist with the Request for Proposal process for an Administrative Service Provider for the Program. The consultant will help maximize the awareness of the RFP. This is to ensure the Program receives a competitive bid that is considerate of the participants and the Program's needs. Again this summary is for informational purposes only, the Board is not being asked to take any action at this time.

Lastly, to make the Board aware, there is a need for the Program to procure trustee services, investment consultant services, and investment management services. These are fundamental services necessary to establish the Program, invest the participants' contributions and hold these contributions in trusts for the participants' retirement. It is anticipated that the RFP will be issued subsequent to the retention to the implementation consultant. This summary is for informational purposes only, the Board is not being asked to take any action at this time.

Mr. Hassler opened the floor for questions from the Board. There were none.

And with that, we will move forward with today's agenda. I ask members of the Board to identify themselves before making or seconding a motion because this is a virtual meeting.

#### ITEMS OF DISCUSSION

#### I. Approval of the Minutes of the Board Meeting of December 16, 2022

Chair Designee Spalla requested a motion to approve the minutes of the Board meeting held on December 16, 2022. A motion was made to approve the minutes of the meeting by Board member De La Hoz, and was seconded by Mr. Walsh, and was approved by the four (4) voting members present.

There were no comments or questions related to the minutes from December 16, 2022.

## II. Resolution of the New Jersey Secure Choice Savings Board Revising the Annual Notice of Meetings

Chair Designee Spalla introduced the resolution authorizing the Board to Revise the Annual Notice of Meetings and requested a motion for approval. A motion was made to approve the resolution by Mr. Walsh, and was seconded by Ms. Azarchi, and was approved by the four (4) voting members present.

#### **PUBLIC COMMENT**

Chair Designee Spalla invited comments from the public.

(Public comment summary from Robbie Vargo): The struggle that many small business owners are dealing with right now with the implementation and signing of this retirement act by Governor Murphy is that private options are not affordable. Small businesses are being threatened with fines if you do not comply. Governor Murphy signed this in 2019 and it is now 2023 and there are still no options for the small business on the fringe who can't afford to do this. It is frustrating to know that this is not implemented yet.

I've signed up for the email list, but have not received any updates on this Program. Many small businesses do not understand this requirement and many do not know that this requirement is out there and there is a potential of being fined for non-compliance. I am not getting any answers and we all fear being fined. To not have all of the Board members here and barely meeting quorum shows that it is not being taken seriously. The public, small businesses, need a timeline, when is this going to be implemented? This is an important responsibility and needs to be addressed in a timely manner, not four years later with the treat of penalties on small business owners. All Board members should be here, there should be a timeline, there should be execution, and it shouldn't be four years after Governor Murphy signs this.

(Andrea Spalla responding): Thank you Mr. Vargo. I appreciate your comments. Good for you for caring enough about your employees to look into the private route for providing retirement savings programs. One of the reasons Governor Murphy signed this act is out of recognition that the private route is not affordable for most small business owners and employers. It is of upmost importance that we get this Program up and running as soon as possible. I'll just remind everyone that the implementation of this Program was delayed by COVID. When a statute takes effect, the implementation of the program takes time and can be very frustrating for everybody. Every Board member that is on this call and those who are not take this Program very seriously and take their Board responsibilities very seriously. We recognize the potential positive impact this Program will have. Before any meaning implementation of the Program could take place we had to hire and install an Executive Director, and he just began less than a month ago. We feel very strongly that the implementation will now be able to follow. All of the steps that Mr. Hassler mentioned are necessary steps to get the Program in place.

I would also like to point out that no employer will incur fines for not participating in the Program until the Program is in place.

(Public comment summary from Robbie Vargo): I respect what you all are doing and I think it is good for employees. I have not seen that last piece, if you could direct the public to where it says that it would be helpful. That is my only concern. I understand that things

take time and you need to go through the process of hiring. The only communication that we are getting is that there was a year grace period and then there would be fines associated per employee. If you could point the public to where that is, that would alleviate my concerns and would be good for most employers to know that that is out there. I don't see anything like that on the website.

(Andrea Spalla responding): I appreciate you pointing that out. That is something that definitely should be addressed. I ask that Executive Director Hassler work with Victoria (Nilsson) to provide some kind of information that can be posted on the website to alleviate the concerns of small employers who don't know the status of the Program and implementation and how it effects their responsibilities. I appreciate your input Mr. Vargo.

Chair Designee Spalla invited comments from the Board.

**Board member De La Hoz**: I am impressed with the amount of people we have today on the meeting. It feels good to see that people care about the process. This didn't start yesterday or a year or two ago, some of us have been very patient for seven years or more to make this happen. Hopefully we will see results soon.

Andrea Spalla responding: I agree. It is heartening to see the level of interest in our meetings. Hopefully there will be lots of information to provide in updates to implementation at the next meeting.

There being no further business, on a motion by Board member De La Hoz, and seconded by Mr. Walsh, and carried by voice vote from members present voting in favor, the meeting was adjourned at 10:28AM.

#### AGENDA ITEM B

## RESOLUTION OF THE NEW JERSEY SECURE CHOICE SAVINGS PROGRAM BOARD AUTHORIZING THE AWARD OF A CONTRACT FOR A MARKETING AND COMMUNICATIONS SERVICES FIRM

**WHEREAS,** the New Jersey Secure Choice Savings Program Board ("Board") was created in, but not of, the Department of the Treasury, pursuant to the New Jersey Secure Choice Savings Program Act, L. 2019, c. 56 ("Act"); and

WHEREAS, the Board solicited engagement responses to a mini-bid request from those Contractors awarded statewide Contracts, through the State of New Jersey's ("State") T3607 – Statewide Advertising and Public Relations Services Contract, to engage a Marketing and Communications Services Firm ("Marketing Services Firm") for the purpose of creating a marketing, public relations, community outreach, and related services plan and campaign for the Board.

WHEREAS, the request for mini-bid solicited proposals and enumerated the criteria to be applied in the evaluation process;

WHEREAS, the Executive Director appointed an Evaluation Committee ("Committee") to review and score the proposals;

WHEREAS, the Committee members independently reviewed and scored the proposals; and

WHEREAS, the Committee recommended the engagement for a Marketing Services Firm be awarded to Marketsmith, Inc. ("Marketsmith").

## NOW, THEREFORE, BE IT RESOLVED BY THE MEMBERS OF THE NEW JERSEY SECURE CHOICE SAVINGS PROGRAM BOARD, AS FOLLOWS:

**SECTION 1.** The recitals are incorporated herein by reference as if set forth at length herein.

**SECTION 2.** The Board hereby selects and appoints Marketsmith as the Board's Marketing Services Firm, which appointment shall be for the period of eighteen (18) months starting on the date of the Notice to Proceed.

**SECTION 3.** The Executive Director is hereby authorized to execute and issue a Notice to Proceed to Marketsmith, confirming its appointment as the Board's Marketing Services Firm.

**SECTION 4.** The terms and conditions of the engagement shall be as set forth in the April 17, 2023, Scope of Work for Engagement of Marketing and Communications Services Firm, attached hereto as **Exhibit 1**.

**SECTION 5.** The payment for all services and fees shall be as detailed in the proposal submitted by Marketsmith dated April 24, 2023, attached hereto as **Exhibit 2**.

**SECTION 6.** This Resolution shall take effect in accordance with the Act.



## NEW JERSEY SECURE CHOICE SAVINGS PROGRAM BOARD REVISED - Engagement for Marketing Services

Date Issued: 4/17/2023

Proposal Submission Due Date: 3:00 pm, April 24, 2017 Emailed to: Executive Director, Todd Hassler at todd.hassler@scp.nj.gov

## NEW JERSEY SECURE CHOICE SAVINGS PROGRAM BOARD REVISED - Scope of Work for Engagement of Marketing and Communications Services Firm

#### 1 BACKGROUND

Governor Phil Murphy signed the New Jersey Secure Choice Act, <u>P.L. 2019</u>, <u>c. 56</u> (the "Act"), in March of 2019 to help private sector employees save for their future in New Jersey (the "State"). The New Jersey Secure Choice Savings Program Board (the "Board") is responsible for the start-up and administration of the New Jersey Secure Choice Savings Program (the "Program"), which is an automatic enrollment retirement savings program that allows private sector employees to contribute, via payroll deductions, to an Individual Retirement Account ("IRA") or Roth IRA (as defined under the Internal Revenue Code sections 408 and 408A, respectively).

#### 2 PURPOSE AND INTENT OF THE ENGAGEMENT

In accordance with the engagement process set forth in Bid Solicitation 19DPP00273, T3067 – Statewide Advertising and Public Relations Services, the Board seeks to engage a vendor (in this and the following Sections, the "Vendor"), for the purpose of creating a marketing, public relations, community outreach, and related services plan and campaign to increase awareness of the Program. This campaign will be directed to covered Employers and Employees as defined in the Act.

The Vendor must have expertise and experience in the following areas: developing branding and creative content for Public Service Announcements ("PSAs") and assisting with the management of paid and earned media events and other types of public-facing marketing efforts. Other responsibilities include producing and timely distributing materials through digital (website/social media platforms) media. The Vendor shall also redesign the Program's website.

#### 3 TERM

The term of this engagement will be for a period of eighteen (18) months starting with the issuance of a Notice to Proceed by the Board to the selected Vendor. The Board anticipates issuing the Notice to Proceed in May 2023.

#### 4 SCOPE OF SERVICES

The Vendor selected for this engagement shall provide the services identified below to the Board:

- A. Work with Program staff and other State employees providing support or counsel to the Program to develop the Program Value Proposition and branding that is consistent with the objectives of the Act, while establishing and communicating a distinctive, positive, Statewide identity for the Program.
  - The Value Proposition shall be a simple statement that clearly communicates the products and service benefit to the Employees and Employers of New Jersey.
- B. In consultation with Program staff, develop a comprehensive marketing and communications plan (the "Plan"), and execute the Plan as directed and approved by the Executive Director of the Program. The Plan shall include, but not be limited to, the following:
  - 1. Program branding finalizing the Program's logo and graphic identity.
  - 2. Selecting and prioritizing the appropriate digital media channels, as well as creating a digital media strategy, including the development of an unpaid social media strategy.

- 3. Establishing Search Engine Optimization ("SEO") Program guidelines and creating a direct mail campaign(s).
- C. Redesign the Secure Choice website. The redesigned website shall include Employer and Employee portals with content specific to each audience. The website should provide an easy enrollment section for Employers, links to various customer service options and financial literacy tools, and toolkits with downloadable materials with multi-lingual social media graphics, flyers, videos and other materials produced related to the Program. Additionally, the new website will contain information about the Program, including, but not limited to Board Meetings, procurement activities, and news items. The new website must be created in a content management system that is easy for Program staff to edit and update.

#### Note that the awarded Vendor will not be required to host the website.

- D. In consultation with Program staff, create forms, letters, enforcement communications, and electronic communications materials that meet the Program's administrative and regulatory requirements, while delivering concise information in plain language.
- E. Vendors should have experience communicating in plain language, to diverse communities, and have the ability to facilitate translations with graphic adaptations that are appropriate to cultural needs. Content created for the Plan must be made available in English and Spanish, and other languages as identified by the Program staff. The Plan should incorporate a strategy for communications through a variety of mediums in order to reach Employees and Employers. These content delivery channels should include, but not necessarily be limited to, the use of Facebook, Instagram, Twitter and any other social media platforms to effectively engage Employers and Employees.
- F. In consultation with Program staff and at the direction of the Program Executive Director, create, manage, and execute a state-wide outreach campaign to the various organizations throughout the State that support or represent businesses, including but not limited to the New Jersey Business Action Center, State and local chambers of commerce, and community organizations.
- G. Identify events and/or conferences hosted by various State agencies, business organizations, or Employers and Employees with a shared interest in promoting the Program for participation by Program staff.
- H. At the direction of the Executive Director, develop, manage, and adhere to timelines for the delivery of the services in this Section in order to meet the Program's objectives.
- I. Meet regularly with Board staff and team members to review tactics as feedback and data from marketing efforts becomes available, and adjust strategies and content as needed.
- J. Provide weekly and quarterly reports to Program staff of the following metrics: impressions, clicks from digital ads, video views, production and deployment of all advertising by type of asset, and other metrics developed in consultation with the Program Executive Director that are determined to be relevant and useful to gauge the Plan's success. All data and metrics from the marketing and outreach shall be provided to the Program for the Program's benefit and use.
- K. Attend Board Meetings as requested.

L. Such other marketing and communications advice as requested by the Program Executive Director

No activities shall be conducted, made public, or disseminated without the prior, express approval of the Program Executive Director.

<u>Note</u>: The Vendor must comply with all local, State and federal laws, rules and regulations applicable to this engagement and to the services performed hereunder. All contractual arrangements shall be governed and construed and the rights and obligations of the parties hereto shall be determined and in accordance with the laws of the State of New Jersey.

#### 5 FEE PROPOSAL

- A. The bidder must provide a person-hour and/or labor category mix chart for the services described under *Section 4 Scope of Services* above. The hourly rates used for each labor category shall be the all-inclusive hourly rates no greater than those submitted in response to the Bid Solicitation.
- B. The chart showing the person- hours proposed to meet the requirements of the request for competitive engagement pricing. The chart shall be designed to reflect the tasks, sub-tasks, or other work elements required by the request for competitive engagement pricing. The chart shall set forth, for each task, sub-task or other work element, the total number of person- hours, by labor category, proposed to complete the scope of work.
- C. Any costs incurred in executing the Plan, for the benefit of the Program, will be paid by the contractor, and reimbursed by the Program.
- D. In response to this engagement request, vendors may submit lower pricing than what was originally proposed, either a lower mark-up rate, or lower hourly rates, but not higher. If a vendor submits lower pricing, that pricing will become the vendor's pricing for this engagement only.

#### **6 SUBMISSION OF THE PROPOSAL**

- A. The potential vendor is advised to thoroughly read and follow all instructions. The proposal must contain all of the information in the order and format indicated below. All terms and conditions set forth in the Bid Solicitation will be deemed to be incorporated by reference in their entirety into any response submitted by the vendor.
- B. The Board assumes no responsibility and bears no liability for costs incurred in the preparation and submission of a proposal, or attendance of interviews, if any, in response to this engagement request. The Board assumes no responsibility and bears no liability for the disclosure of any information or material received in connection with this solicitation, whether by negligence or otherwise.
- C. A copy of your proposal must be emailed to Executive Director, Todd Hassler at todd.hassler@scp.nj.gov. The proposal must be received by the date and time shown on the cover page. Proposals received after the time and date will not be considered. Physical proposals will not be accepted or reviewed.
- D. In the proposal, please respond to each of the following questions by repeating the question at the top of the section and referring to the question by the number below:

- 1. Please include the addresses, telephone numbers, and email addresses for those individuals who will be directly responsible for performing the work under this engagement on a day-to-day basis and the individual who will lead the assignment(s) if selected. Please also provide brief resumes including relevant experience for those individuals.;
- 2. Provide a list of all marketing campaigns on which your firm has served that are of comparable size and scope of service;
- 3. Discuss any innovative ideas used for marketing options that may be beneficial to the Program;
- 4. Provide three (3) references from current and/or past clients and discuss the services you have provided or are currently providing to them;
- 5. Provide the names of all clients who have terminated your firm's services in the last three (3) years. In each case, detail the reason for termination.
- E. The Proposal must meet State expected impressions and expected measurable impact/reach and demographics. In the proposal, please respond to each of the following questions by repeating the question at the top of the section and referring to the question by the number below:
  - 1. A detailed approach to perform the scope of work reflecting the requirements of the engagement including, but not limited to, campaign details, collateral, social media plan, media plan, and associated research, including a project plan including the timeframe for project completion, specific description of, and schedule for, deliverable items, and a schedule of labor and mark-up costs associated with specific events and deliverables.
  - 2. The Proposal shall also include examples of previous campaigns and metrics reached, as well as examples of any applicable resulting behavioral change.
  - 3. Vendors shall provide examples of ad campaigns for underserved communities and include examples of translated materials.
- F. All documents and information submitted in response to this engagement request will become property of the Program and shall be open to inspection by members of the general public once the selection process is complete, in accordance with the "New Jersey Open Public Records Act" ("OPRA") (N.J.S.A. 47:1A et seq.), as amended, and including all applicable regulations and policies and applicable case law, including the New Jersey Right-to-Know law. In responding to an OPRA request, any proprietary and/or confidential information in a firm's proposal will be redacted by the Program. The firm may designate specific information as not subject to disclosure pursuant to the exceptions to OPRA found at N.J.S.A. 47:1A-1.1, when the firm has a good faith legal and/or factual basis for such assertion. The Program reserves the right to make the determination as to what is proprietary or confidential and will advise the firm accordingly. The Program will not honor any attempt by a firm to designate its entire proposal as proprietary, confidential and/or to claim copyright protection for its entire proposal. In the event of any challenge to the firm's assertion of confidentiality with which the Program does not concur, the firm shall be solely responsible for defending its designation.

#### 7 SELECTION PROCESS

All proposals will be reviewed to determine responsiveness. Non-responsive proposals will be rejected without evaluation. Responsive proposals will be reviewed and scored by an evaluation committee pursuant to the grading scale it creates and a recommendation for appointment will be made to the Board.

The Board reserves the right to request clarifying information subsequent to the submission of the proposal if necessary.

Interviews may be conducted, at the option of the evaluation committee, with any or all of the firms submitting a proposal. If interviews are to be held, firms will be notified.

The Board will evaluate proposals based on the vendor's overall technical approach and plans to meet the requirements of this Scope of Services. The proposal should convince the Board that the vendor understands the objectives that the Scope of Services, the nature of the required work and the level of effort necessary to successfully complete the project. Vendor proposals will also be evaluated based on the vendor's ability to reach the target audience through multi-media.

The vendor whose proposal, conforming to the Scope of Services, is most advantageous to the State, price and other factors considered, will be recommended for award.





## THANKYOU

Dear Mr. Hassler:

Creating a brand is not easy, and building and then launching a new, significant, and important savings platform for New Jersey is certainly a monumental undertaking. We are eager to work with you on this huge step forward for those New Jersey residents who work for one of the almost 1,000,000 small businesses in the state. Almost 99% of the businesses in this state are considered small. We rank 11th in the country in the sheer number of small businesses and their workers that will really benefit from the Secure Choice Savings Program.

At Marketsmith, we are obsessed with being exceptional at delivering for you and building a brand for future generations to be proud of. We believe New Jersey residents rely on us to reach them when it is something they need to know and that would make their quality of life better. Working with the State of New Jersey not only is an amazing opportunity and responsibility, but it is also something that my team cherishes.

This program is incredibly important to the state, to the Governor and to his mission and to all of us who are chosen to make New Jersey a strong, vibrant State where fairness and opportunity reign.

Our revised response has been broken into sections based on the specifications outlined in the proposal. Below is a quick overview of each:

- Who we are and our experience in relationship to Secure Choice's goals of educating multiple targets and personas across the state and in specified areas
- Our revised examples, recommendations, and approach to strategic media planning, buying, and measurement
- Creative concepts that translate to the various target audiences
- A public relations effort partnered with Violet PR, a New Jersey-based PR firm we have worked with across various state campaigns

Governor Phil Murphy said, "By creating the Secure Choice Savings Program, we are ensuring that every worker in New Jersey will have the opportunity to save for the future," and to that, we say, thank you.

Thank you for the opportunity,

Monica C. Smith CEO/Founder





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- Creative Concepts
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- 4. Fees and Project Management
- Case Studies



## SECTION D, QUESTIONS 1-5

Section D, Question 1: Please include the addresses, telephone numbers, and email addresses for those individuals who will be directly responsible for performing the work under this engagement on a day-to-day basis, and the individual who will lead the assignment(s) if selected. Please also provide brief resumes, including relevant experience for those individuals

Section D, Question 2: Provide a list of all marketing campaigns on which your firm has served that are comparable in size and scope of service

Section D, Question 3: Discuss any innovative ideas used for marketing options that may be beneficial to the program.

Section D, Question 4: Provide three (3) references from current and/or past clients and discuss the services you have provided or are currently providing them.

**Section D, Question 5**: Provide the names of all clients who have terminated your firm's services in the last three (3) years. In each case, detail the reason for termination.



## MARKETSMITH LEADERSHIP



Monica C. Smith Chief Executive Officer

Link to Resume

Address: 110 S Jefferson Rd Whippany, NJ 07981

**Email Address:** msmith@marketsmithinc.com

**Phone Number:** 201-803-6889



Rachel Schulties Chief Operating Officer

Link to Resume

Address: 110 S Jefferson Rd Whippany, NJ 07981

**Email Address:** rschulties@marketsmithinc.com

**Phone Number:** 201-803-6889



Carina Pologruto
Chief Innovation Officer

Link to Resume

Address: 110 S Jefferson Rd Whippany, NJ 07981

**Email Address:** cpologruto@marketsmithinc.com

**Phone Number:** 201-803-6889



Desiree Maurin

Sr. Vice President, Client Performance

**ACCOUNT LEAD** 

Link to Resume

Address: 110 S Jefferson Rd Whippany, NJ 07981

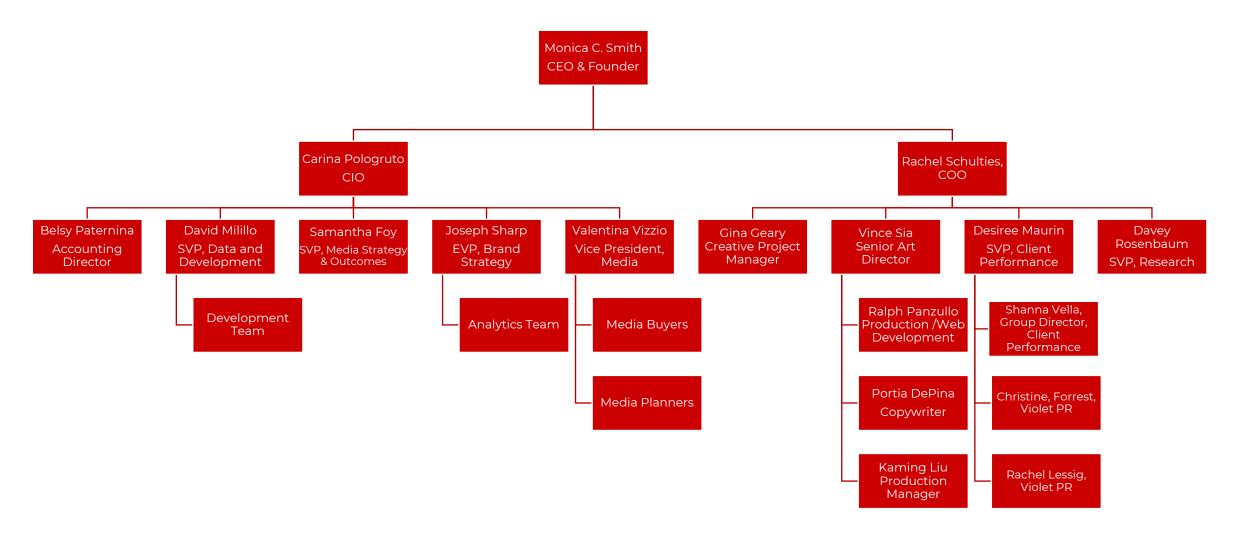
**Email Address:** dmaurin@marketsmithinc.com

**Phone Number:** 201-803-6889



## MARKETSMITH DAY-TO-DAY TEAM







## SIMILAR CAMPAIGNS

#### NJ Department of Banking and Insurance

GetCovered NJ

#### NJ Department of Human Services

ReachNJ

#### NJ Board of Public Utilities

NJ Clean Energy Program

#### NJ Department of Highway Traffic Safety

Distracted & Impaired Driving

#### NJ DHS and the Office of the First Lady

Nurture NJ

#### **NJ Department of Health**

COVID-19 Vaccinations & Boosters

#### **NJ Division of Taxation**

Tax Amnesty



















## GOV. MURPHY'S IMPACT ON NEW JERSEY

As an innovator, thought leader, and the respected voice for the people of New Jersey, Governor Phil Murphy and his administration have developed several life-changing programs that have positively impacted and created better lives for New Jersey residents, such as:

- **GetCoveredNJ.** New Jersey's Official Health Insurance Marketplace
- ReachNJ. New Jersey's Addiction Helpline
- NurtureNJ. Safe and Equitable Maternal and Infant Health Resource
- NJ Clean Energy Program. Programs and Services to Promote a Clean Energy Future for NJ.

All of which, Marketsmith has had the honorable pleasure of executing alongside the Murphy administration.

As the face of these inaugural New Jersey initiatives, Governor Murphy is a a brand that we, as New Jerseyans, trust. A face that has a significant impact and grabs the attention of residents from around the state.

By incorporating imagery and quotes from Governor Murphy himself, along with targeted creative assets and purposeful media placement, the Secure Choice Savings Program will commence with a strong reputation, exuding humanity, positivity, and forward thinking.





## GOV. MURPHY'S BRAND

#### **Client Spotlight**

#### Dept. of Banking and Insurance (DOBI)

- As the inaugural NJ Health Insurance Marketplace, GetCovered NJ provides health coverage to over 341K NJ residents.
- Like Secure Choice, GetCovered NJ was created under the Murphy administration.
- To ensure that this impactful program remains a stable part of NJ, DOBI wanted to re-enforce that this was one of Governor Murphy's priority initiatives by including the governor's brand in the messaging.
- By doing so, the people of NJ understand that this is a legacy program making healthcare accessible and affordable to all NJ residents









New Jersey Governor

Phil Murphy

health insurance.



Get Covered N

## CLIENT REFERENCES

#### Marketsmith References

#### **NJ Department of Human Services**

Tom Hester, Director of Communications

Tom.Hester@dhs.state.nj.us

Services Provided: Strategy, research, creative development and execution, media planning and buying, analytics

#### **Northstar NJ Jersey Lottery Group**

Vince Smart, Sr. Director of Marketing

Vincent.Smart@nsni.com

Services Provided: Strategy, research, media planning and buying, event marketing, analytics

#### NJ Department of Labor and Workforce Development

Thomas Wright, Deputy Director of Communications and Marketing Thomas.Wright@dol.ni.aov

Services Provided: Strategy, research, media planning and buying, event marketing, analytics

#### Violet PR References

#### The New Jersey Business Action Center

Melanie Willoughby, Executive Director

melanie.willoughby@sos.nj.gov

Services Provided: Social media, media relations, content development, general public relations support

#### **Biggins Lacy Shapiro & Company**

Andrew Shapiro, Managing Director

ashapiro@blsstrategies.com

Services Provided: Conference and event support, virtual events, content development, social media

#### New Jersey Economic Development Authority (NJEDA)

Christie Huus, Executive VP – Public Affairs and Special Projects chuus@nieda.com

Services Provided: Media relations, public relations, content development



## **CLIENT TERMINATIONS**

#### Marketsmith

- Thomas Edison State University, lost in 2020. We were contracted for one year; contract was not renewed; no reason provided.
- My Cloud Fitness, lost in 2022. Funding no longer available.
- Sturbridge Yankee Workshop, lost in 2022. Company closed.

#### **Violet PR**

 There have been no client terminations in the past three years.





# SECTION E, QUESTION 1

Section E, Question 1: A detailed approach to perform the scope of work reflecting the requirements of the engagement, including, but not limited to, campaign details, collateral, social media plan, media plan, and associated research, including project plan, time frame for project completion, specific description of and schedule for deliverable items, and a schedule of labor and markup costs associated with specific events and deliverables.



## WE KNOW NEW JERSEY

As an agency rooted in New Jersey for more than 20 years, we are embedded into the fabric of this state. You will not find an agency with the same level of NJ-based experience offering services and support focused on brand strategy, creative development, media planning and buying, and campaign measurement. We have experience working with national retail and direct-to-consumer brands, along with local and regional clients. This includes our extensive work with over 12 departments and divisions of the state of New Jersey within the past 24 months alone.

Understanding the inner workings of New Jersey, along with strong knowledge of our diverse population and complex marketing landscape, makes us unstoppable. Over the past several years, we've worked together with the state of New Jersey, our home, to build a distinct and consistent brand in terms of the communications, messaging, imagery, etc.

We are trusted advisers who come with data, a modern approach to media testing and design, and the agile methodology needed for both opportunistic times and the unexpected tragedies, natural disasters, and unforeseen challenges that we know will unfortunately come. You need a team that can be ahead of you, one that can see what is going to happen before it strikes. Our marketing strategists and subject matter experts have years of media relationships under their belts and are constantly educating themselves on the latest and greatest in the New Jersey media landscape. We purchase more media than any other agency in the state, creating unsurpassed buying power and tens of millions of dollars in free or bonus media for our clients.

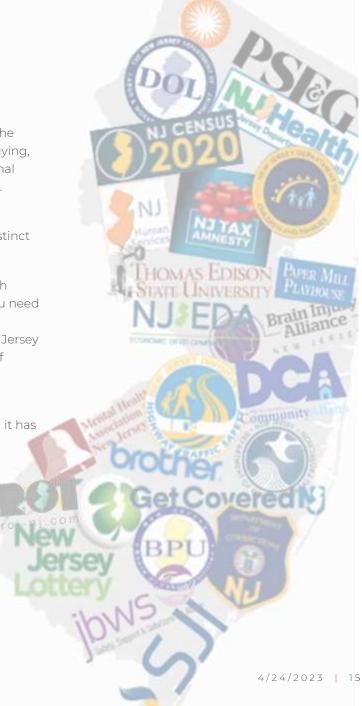
When your goal is to build awareness, you must work with an agency that can bring you the reach needed and hold every single dollar accountable. There is simply no other agency that can compare when it comes to knowing, living, breathing, and loving New Jersey and all it has to offer.

#### **OUR PARTNERS**

- Department of State and NJ Complete Count: 2020 Census
- Department of State, Division of Elections: 2020 Primary
- New Jersey Lottery
- NJ Board of Public Utilities: NJ Clean Energy Program
- Division of Banking and Insurance: GetCoveredNJ
- · Department of Health: COVID-19 Vaccinations and Boosters
- Department of Human Services: Reach NJ and Medication Assisted Treatment

- Department of Highway Traffic Safety: Impaired and Distracted Driving
- Department of Children & Families: Safe Haven and Youth Suicide Prevention
- Office of First Lady/Department of Human Services: Nurture NJ
- Department of Environmental Protection: Electric Vehicles and Radiation Emergency
- Department of Labor: Paid Family Leave and Shared Work Program
- NJ Economic Development Authority





## UNDERSTANDING THE REQUEST

The successful bidder shall design and develop a multilingual and multichannel statewide public awareness and outreach campaign to announce the New Jersey Secure Choice Act, signed by Governor Phil Murphy in March 2019, which will help private sector employees save for their future in New Jersey. As defined in the Act, this campaign will be directed to covered employers and employees and allows private sector employees to contribute, via payroll deductions, to an IRA or Roth IRA to invest in their future.

#### The successful bidder will:

- Work with program staff to develop a comprehensive marketing and communications plan, while establishing a statewide distinctive and positive identity for the program that includes finalizing the program's logo and graphic identity, prioritizing appropriate media channels, and negotiating rates and placing paid media advertising as needed.
- Develop a media strategy for a six-month campaign that includes media channels such as digital, direct mail, and SEO.
- Develop creative assets that specifically target the programs audience(s) and are aligned with the brand's identity.
- Redesign the Secure Choice website.
- Work with program staff to develop a statewide outreach campaign to various organizations that represent businesses and identify relevant events/conferences hosted by the various state agencies and organizations that would assist in promoting the program.

The goal of this campaign will be to **increase the awareness** of the inaugural Secure Choice Savings Program, giving private sector employees the opportunity to invest in their future selves. The goal of this campaign will also be to build the program's overall brand identity and **increase overall engagement and enrollment in the program.** 





## A CUSTOMIZED STRATEGIC FRAMEWORK

#### **GOAL**

Increase awareness of and engagement with the New Jersey Secure Choice Savings Program, designed to help private sector employees save for their future.

#### **KEY COMPONENTS**

- Media Buying and Placement
- Creative Development and Production
- Reporting and Data Analysis
- Tactical Strategy and Implementation

Associated Research

#### **SEGMENTS**

#### **GENERAL PUBLIC** New Jersey residents

#### **Employers**

25+ employees, in business for 2+ years. have not offered qualified retirement plan

#### **Employees**

18+, lives/works for NJ company, wages subject to NJ tax withholding

#### **TARGET LANGUAGES**

English and Spanish – others as specified by program staff

#### **REQUIREMENTS**

- Development of a visually appealing graphic identity and a creative platform that drives awareness of the Secure Choice Savings Program
- An agile, responsive, and inclusive media campaign with an informed selection of tactics in order to reach the target audience(s)
- · Create inclusivity across all populations, demographics, and abilities, ensuring that we use relevant touch points (including collateral development) and language for the full diverse and multicultural audience of the state of New Jersey

#### **OUTCOMES**

- Increase enrollment, website traffic, and digital ad engagement to measure an increased awareness of the Secure Choice Savings Program
- Develop the program's graphic identity to the point that the target audience(s) is familiar, receptive, and trusting of the new plan's benefits



## WHAT DRIVES OUR STRATEGY?

Marketsmith is an award-winning, full-service marketing agency with a proven and celebrated history in driving growth for brands and influencing behaviors for New Jersey state campaigns of significance. Each campaign is built against a unique strategy incorporating research and insights, thoughtful creative, and tactically precise media to operate with transparency, end-to-end measurement, and ROI-driven goals. Our fully in-house media, creative, research, and client performance teams have executed dozens of large-scale awareness and action-focused campaigns in the last few years alone. Our research is embedded seamlessly and updated weekly into all aspects of strategy, creative, and media approach. Creating intelligent learning panels helps us understand the impact of delivered impressions, language, timing of placements, recall, and creating action over time. We use this as a core part of our framework.



#### **RESEARCH**

Research fuels strategy, allowing us to start smart and think ahead. Demographic, qualitative, and quantitative data allow us to tailor creative and media to reach your goals.



#### **HIGH-PERFORMANCE CREATIVE**

Knowing our audience, the landscape, and challenges ahead allows us to concept award-winning creative to drive action and behavioral change.



#### **MEDIA PLANNING AND BUYING**

100% accountability. Our inhouse team of media experts understands the New Jersey media landscape and tactics needed to be successful.



## 1

## UNDERSTANDING OUR TARGET AUDIENCE MINDSDET

Before identifying media channels/tactics that are relevant to this audience, we must understand better who our core segments are, what will resonate with them most, and then we can consider where to reach them with relevant messaging. In order to do this, we first explore several data sources, including MRI-Simmons, U.S. Bureau of Labor Statistics, U.S. Census Bureau, EBRI, and others.

#### What We Learned About Consumer Sentiment and Concern About Retirement:

Overall sentiment toward retirement is strong and continuing to grow in terms of confidence in living comfortably in retirement. Seventy-three percent of current workers believe that they will be able to live comfortably in retirement. This has grown steadily since 2009, when just 54% of respondents were confident in the same concept. Inflation is the #1 reason for retirement insecurity, 2x greater than the government's impact on Social Security, unemployment, and COVID.

Based on a study by Medium.com, people generally think about the future as being anywhere from a few years away (60%) to several decades away (20%), and money is the primary concern (44% wonder if they will have enough to get by, 23% wonder if they will be able to afford to fulfill their goals). The top concerns for these consumers regarding long-term financial planning are saving and budgeting for the money currently saved for retirement, and planning for future healthcare/caregiver expenses. Working in retirement is even more important because of the number of people who believe that a workplace-administered retirement plan will be a major source of retirement income (19% in 2022 vs. 54% in 2021).

Based on this information and the legislation, we have defined our New Jersey consumer target as follows: an NJ Resident who is employed (FT/PT), working for a private-sector business that employs 25+ people, and who does not currently participate in a qualified workplace retirement plan (Traditional IRA, or Roth IRA, or Keogh or 401(k), or 403(b), or 457(b), or pension).

These New Jersey consumers share many of the specific concerns. Some are more pronounced, with this segment being 20% more likely to worry about being able to retire when they want than the national average. Being able to enjoy life and spending time with family are top priorities for them. They are not without their contradictions, however, as this consumer is also less likely to be a future planner as it relates to their finances. This segment is 68% more likely than the national average to say that it is better to have what you want now, because you don't know what tomorrow brings. Additionally, only 65% report taking an active role in planning for their retirement (14% less likely than average).



## UNDERSTANDING OUR TARGET AUDIENCE DEMOGRAPHIC

#### WHAT WE'VE LEARNED

#### **Consumer Target**

This consumer has a **median age of 45 years old**, but there are 2 age segments that stand out: a younger segment of A18-34 and a middle-aged segment 45-54. They tend to skew male and are racially/ethnically diverse (64% White, 29% Hispanic, 15% African American). Any messaging should include a multicultural element, and in-language messaging should be considered. Overall, their educational history is mixed, with 58% not having a college degree, 10% with a two-year degree. The remaining 32% have at least a four-year degree or higher. HHI for this overall consumer generally skews above average.

This consumer is digital-centric, with heaviest channel usage being digital media, where 65% are medium to heavy users (17% more likely than average), followed by social media where 50% are M/H) users and TV with 43% M/H users. They rely heavily on the internet for keeping in touch with family and friends, shopping, and staying informed about current events and news. The internet is also their most trusted media (25%), followed by TV (21%), then newspapers (16%). They spend more time than average online, spending 5.2 hours/day online (117 index). Additionally, 54% are spending more than one hour/day on social media using Facebook (61% penetration), YouTube (53%), Instagram (50%), and Snapchat (23%).

They are more likely to utilize at least one streaming service (83%), than traditional TV (60%) and their favorite streaming services are Netflix (71%) and YouTube (55%). They also watch Prime Video (38%), Disney+ (32%), and Hulu (26%). Their audio consumption is aligned with statewide averages, listening to more terrestrial radio (67%) than streaming audio (35%). Top streaming audio apps include Spotify, Pandora, and Apple Music. This consumer is notably more likely to utilize an adsupported Pandora (14%) vs. Spotify (6%) This consumer spends most of their listening time with Urban, CHR, and AC.

#### **Employer Target**

This audience has been defined as those in the organization with senior-level titles such as owner/partner, C-suite, president/vice president, or general manager. This group is responsible for making decisions that affect the entire organization and drive the business and its employees forward. This audience will be critical as they will need to provide their companies with the details around the Secure Choice Savings Program and ensure the proper administration of it within their organization. In NJ, this audience has a median age of 48, skewing heavily 35-64 years old (73%), and an HHI above \$100K. They are well educated, with 51% having a four-year degree or higher. Overall, they generally follow racial/ethnic skews within the state but have a slight over index within the White segment (80%).

From a media perspective, this decision maker is digital first with 61% of them being medium to heavy users of digital media. Social media (46%), TV (45%), and radio (39%) are their most heavily used channels. Overall, they are relatively average in terms of their total media usage. On average, they spend 4.9 hours/day online, with 15% of the spending more than 7.5 hours. This time includes a mix of business and personal activities such as banking/finance, email/communication/schedule, social media, and shopping. While they use personal social media at a relatively average pace (Facebook 65%, YouTube 52%, etc.), they significantly overuse LinkedIn compared the average consumer (37%). Their digital lives extend to their video and audio consumption as well. They are more likely than average to consume streaming video (85%) and 48% listen to streaming audio.



# TOOLKIT AND COLLATERAL

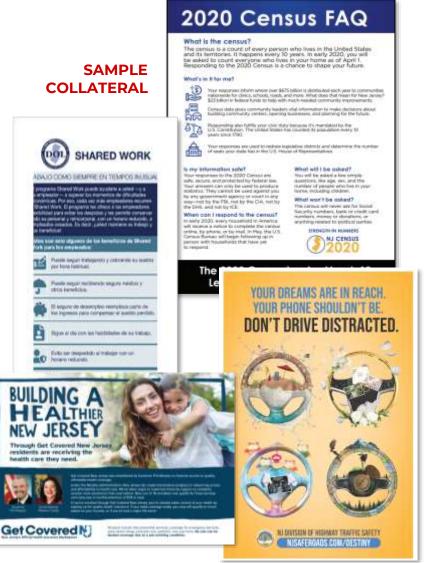
When it comes to educating the public on inaugural New Jersey programs, the amount of information can be overwhelming. Digital and traditional advertising builds awareness but making additional collateral and assets available in conjunction with the paid efforts can push your message even further.

Collateral and assets for people to download, take, and review will be an important part of this campaign to increase overall awareness and engagement with the program. Because this is a new program implemented by the Murphy administration, the more information that is available to the public, the better.

Combining the approved creative concept with QR codes to elevate the elements will keep the education fresh and accessible to consumers.

The collateral developed will be available digitally and developed in other languages as needed. Collateral to be developed includes:

- Social media graphics
- Flyers
- Video assets
- Posters
- Multilingual resources and graphics
- Other materials as requested







# SECTION E, QUESTION 1

Section E, Question 1: A detailed approach to perform the scope of work reflecting the requirements of the engagement, including, but not limited to, campaign details, collateral, social media plan, media plan, and associated research, including project plan, time frame for project completion, specific description of and schedule for, deliverable items, and a schedule of labor and markup costs associated with specific events and deliverables.



# WEB DESIGN

The development period will range between 3 and 4 months and will include documentation and training on the CMS.



Discovery Phase / Brand Strategy Meeting	<ul> <li>Project clarification, details, and scope outline</li> <li>Identify business's target audience and complete market research</li> <li>Internal project management timeline creation</li> <li>Internal team meetings and talent selection process</li> <li>Review potential content management systems and website platforms for client selection</li> </ul>
Initial Design Composition / Revisions	<ul> <li>Solution definition based on Wireframe</li> <li>Design website plate with the agreed-upon multiple revision rounds</li> <li>Implement revisions</li> </ul>
Setup Test Environment & Server Configuration	<ul> <li>Initiate server &amp; resource allocation</li> <li>Install and set up approved Plug-Ins</li> </ul>
Web Site Design and Code Development	<ul> <li>Implement design based on approved composition</li> <li>Implement navigational structure and content strategy</li> <li>Program environment and feature sets / front-end development / Plug-Ins setup</li> <li>UI / UX / testing and launch</li> </ul>
Launch Preparation	<ul> <li>Clean out all test URLs and prepare to launch on production servers</li> <li>Offer consulting assistance for properly pointing DNS records</li> <li>Conduct an introductory website training session with client</li> </ul>



# Creative Concepts

We create every concept to visually demonstrate the goals of the campaign by focusing on the action we want each to drive or the message each must convey. On the following pages, we will share with you three creative concepts developed for this initiative. For each concept, we highlight imagery, font, colors, and tone of voice selected specifically for this initiative and to resonate with our target audience(s).

Every aspect of this campaign will be appealing and inclusive to New Jersey residents, regardless of their age, gender, or location within the state. We will also be able to translate tactic-specific creatives and develop collateral materials for whichever concept is selected. Marketsmith takes a phased approach in developing all creative executions:



#### RESEARCH

To properly execute a concept, we review any current materials used by NJ Secure Choice.



#### CONCEPTING

After review of current materials, we build out a campaign concept that can be easily transferrable to any applicable marketing mediums.



#### EXECUTION

Once the creative concept is agreed upon by all stakeholders, we begin to lay out all tactical executions, including collateral.



# NEW JERSEY'S FUTURE IS BRIGHT

The creative ethos behind the NJ Secure Choice retirement savings campaign centers around the message of preparing for and building one's financial future. We took special care to call out that this is a new program, backed by the state, and a unique first-of-its-kind benefit that people should take advantage of as New Jersey residents. We emphasize the bright future they have ahead of them and securing that by planning for retirement with NJ Secure Choice. Ultimately, the message is that the NJ Secure Choice program opens doors to a happy, healthy, and secure future for residents.

For the purpose of this campaign, we created different sets of creative deliverables that speak to either the employee or the employer audiences. For the employee, this is an exciting new opportunity to opt into a retirement savings that is convenient, secure, trusted, and backed by New Jersey state. For the employer, we stress that this is an attractive perk for recruiting and retaining top talent. The notion is that this is a gift to their employees – something they deserve – and it will make them more attractive as an employer. Our aim is to build awareness for both employers and employees and provide them with the information they need to learn more about this exciting new benefit offering, NJ Secure Choice.

In terms of the visuals, we selected individuals and graphics that are optimistic, enthusiastic, and confident. The images and language convey that this is very advantageous for all who participate – that it's setting them up for success, and they won't want to miss out. The subjects are central to each piece of content and are seen smiling, with heads high, highlighting them in a way that is joyful, optimistic, and self-affirming. The benefit of a secure, well-planned retirement gives peace of mind, and looking toward one's golden years has never been brighter!



# BRAND POSITIONING

# BRAND POSITIONING

NJ Choice Secure Savings is the retirement plan you can trust. It's the door to your financial future. It's the savings you need to retire. Investing in your future starts now, however big or small. Plan today, for a brighter future.



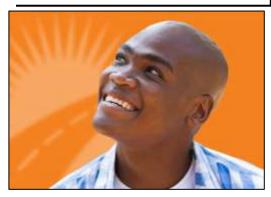
# CREATIVE CONCEPT:

# SUN

# SUN



Colors



# **SECURE CHOICE**

Ouasimoda

Typography



Imagery

**INSPIRATION:** Building for a brighter future and saving for retirement fills us with hope and excitement. This overall concept employs symbols and colors that inspire us.

TYPOGRAPHY: Quasimoda combines fashionable geometric forms with oldfashioned classical proportions. It gives off a fresh, modern feel, with excellent readability and elegance.

**IMAGERY:** The path graphic featured in the logo represents how individuals involved in this savings plan are contributing toward a brighter retirement future. The images chosen to convey this concept should exude confidence and optimism toward the future. The images show individuals looking upwards, with hope.

COLOR: Blue, associated with stability, trust, and security, is a calming and trustworthy color often used in financial institutions and retirement programs. Orange, a warm and energetic color, conveys enthusiasm and excitement and creates a sense of urgency around retirement planning.



## $\bigcirc\bigcirc\bigcirc\bigcirc$







# DIGITAL - EMPLOYEE

#### **English A**



Click here to preview banner animation

#### **English B – with Governor Murphy**



Click here to preview banner animation

### **Spanish**



Click here to preview banner animation

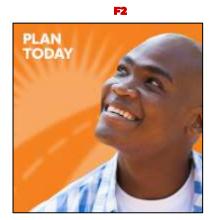


# :10 SOCIAL VIDEO - EMPLOYEE (FACEBOOK)

F

Video: A young Caucasian woman smiling and looking hopeful.





Video: A young African American man fades in, smiling and looking hopeful



Video: A young Asian man fades in, smiling and looking hopeful



Video: Shape of part of the logo zooms in. Image fades out.



Video: Logo zooms in. Image fades

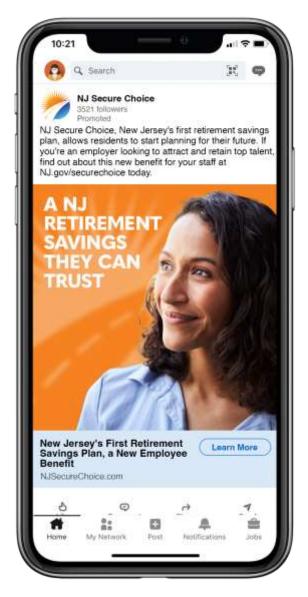


Video: CTA fades in with Governor Murphy.



# :10 SOCIAL VIDEO - EMPLOYER (LINKEDIN)

Video: A young woman smiling and looking hopeful.





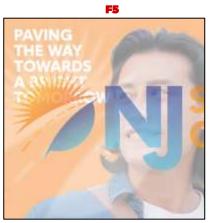
**Video:** A young African American man fades in, smiling and looking hopeful



Video: A young Asian man fades in, smiling and looking hopeful



Video: Shape of part of the logo zooms in. Image fades out.



Video: Logo zooms in. Image fades

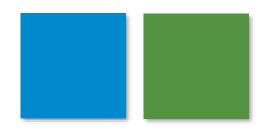


Video: CTA fades in with Governor Murphy.



# CREATIVE CONCEPT:

# DOOR



Colors

# **SECURE CHOICE**

Soleil

Typography



**Imagery** 



**INSPIRATION:** This program gives companies that cannot afford a 401k, an opportunity to participate in a government-sponsored retirement saving program. This opens a door for them to save for their future through the program's provisions.

TYPOGRAPHY: Soleil is a geometric sans serif typeface. It look fresher, dynamic, and contemporary. Soleil is based on the modernist ideas of simplicity, clarity, and reduction to essential forms. It offers a wide range of potential applications: signage and wayfinding systems, book and magazine design, branding and corporate publications.

**IMAGERY:** Showing visuals of happy staff exiting doors communicates the advantages of participating in the retirement savings plan.

**COLOR:** Blue is a calming and trustworthy color that is often associated with stability, trust, and security. Green is associated with growth, prosperity, and stability. It is often used in financial logos to represent growth and stability.



## LOGO

# **SECURE CHOICE**

**SECURE** CHOICE

# SECURE CHOICE

SECURE



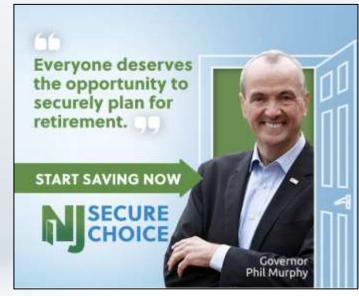
# DIGITAL - EMPLOYEE

#### **English A**



Click here to preview banner animation

#### **English B – with Governor Murphy**



Click here to preview banner animation

#### Spanish



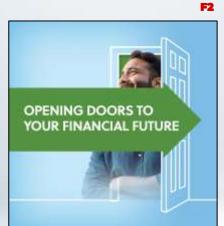
Click here to preview banner animation



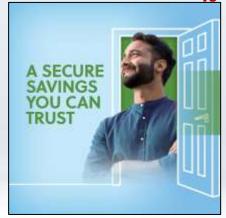
# :10 SOCIAL VIDEO - EMPLOYEE (FACEBOOK)



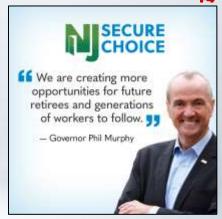
Video: A green arrow comes in from left, pointing to a door with light coming out.



Video: Door opens with a person looking hopeful behind the door.



Video: Green arrow exits out to right and headline changes.



Video: Green arrow fades out. Logo and Governor Phil Murphy fade in.



Video: Logo enlarges and CTA fades



# :10 SOCIAL VIDEO - EMPLOYER (LINKEDIN)



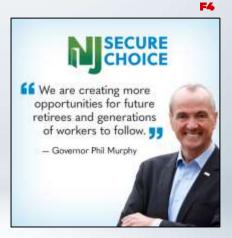
Fi Video: A green arrow comes in from left, pointing to a door with light coming out.



Video: Door opens with a person looking hopeful behind the door.



Video: Green arrow exits out to right and headline changes.



Video: Green arrow fades out. Logo and Governor Phil Murphy fade in.



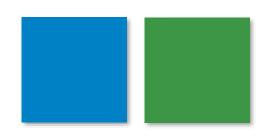
Video: Logo enlarges and CTA fades



# CREATIVE CONCEPT:

# BRIGHT

# BRIGHT



# Quatro Noto Serif

Colors

Typography





Imagery

**INSPIRATION:** Saving for retirement means a bright future. A future so bright, you gotta wear shades.

**TYPOGRAPHY:** Quatro is a modern, Bauhaus-inspired sans serif with the perfect balance between hand and machine. Noto Serif is a modulated serf with a classic look and feel.

**IMAGERY:** Images show a variety of people doing what they love doing because of their financial freedom. We see them in exciting, adventurous places.

**COLOR:** Light blue and green complement each other nicely and invoke feelings of trust and hope.













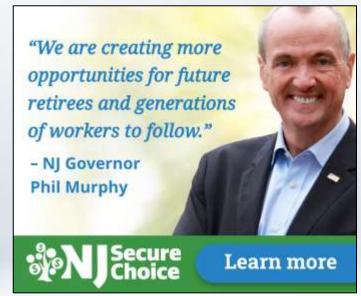
# DIGITAL - EMPLOYEE

#### **English A**



Click here to preview banner animation

#### **English B - with Governor Murphy**



Click here to preview banner animation

### Spanish



Click here to preview banner animation



# :10 SOCIAL VIDEO - EMPLOYEE (FACEBOOK)



Video: A woman looks into the camera, smiling as rays behind her head animate.



Video: The woman turns forward and puts on her sunglasses.



Video: The woman looks up with her sunglasses on.



Video: A frame with Governor Phil Murphy fades in.



Video: As a blue background fades in over Murphy, the full logo slides in and the url appears below.



# :10 SOCIAL VIDEO - EMPLOYER (LINKEDIN)



Video: A man in a suit looks down, smiling as rays behind his head animate.



Video: The man starts to look up and put on his sunglasses.



Video: The man looks ahead with his sunglasses on.



Video: A frame with Governor Phil Murphy fades in.



Video: As a blue background fades in over Murphy, the full logo slides in and the url appears below.



# HOME PAGE







"Saving for retirement is paramount for all employees, but too often, those who work for small businesses don't have a simple way to set aside these savings. By creating the Secure Choice Savings Program, we are ensuring that every worker in New Jersey will have the opportunity to save for the future. We are creating more appartunities for future retirees and generations of workers to follow." - Ni Governor Phii Murphy



#### THE BENEFITS OF SECURE CHOICE



Availability of employee retirement benefits



More competitive position in the recruiting market place



Centralized retirement benefits across other NJ small empoyers



Serare Choice Mogram

SC West State Street, 8th River Trendon, New Jenny 18829

First Name



## Geared toward employer (times out to :26/27)

Are you a New Jersey employer, looking to give your employees the best benefits available? Well, then you'll want to know about New Jersey Secure Choice, the state's very first retirement savings plan! This state-backed program is available to all New Jersey employers and residents – because we believe that everyone deserves a healthy retirement. With New Jersey Secure Choice, you can help pave the way for your employees to secure a better future. To find out more visit NJSecureChoice.com

## Geared toward employee (times out to :28)

Pssst.... New Jersey! Did you know that there's a new retirement program for New Jersey state residents?! Yes! New Jersey Secure Choice! It's our first state-backed retirement savings plan – and it's available to any resident, of any age, who works for a local employer. We all deserve a healthy, happy retirement – and the future could be really bright for you ahead. Talk to your employer to find out more about enrollment or visit NJSecureChoice.com for more information. It's a great opportunity to start investing today for a better future tomorrow!



SCOPE OF WORK - MEDIA STRATEGY

# Media Strategy

Marketsmith's expertise is at the intersection of media, marketing, and technology. This approach allows us to connect you to your customers at scale while growing your bottom line. Our strong history of growing and scaling companies from challenger to publicly traded brands is well known and celebrated in the marketing landscape.

We have subject-matter expertise across digital and traditional media channels, and our 100% in-house media department affords us the ability to act quickly and be agile in a time when there are a lot of factors at play.



#### PERCENTAGE OF TOTAL NET AGENCY SPEND 2022













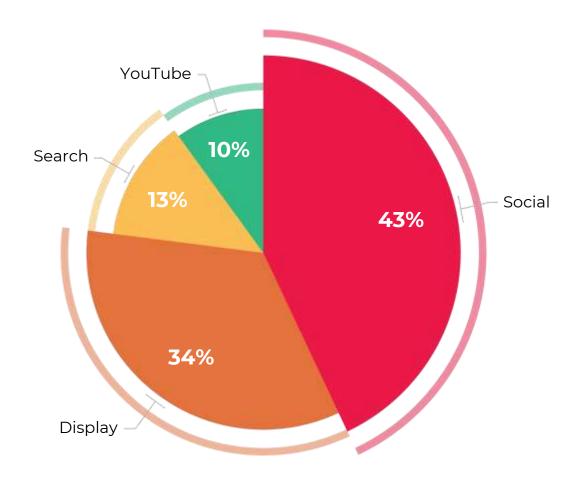


# OVERALL PLAN COMPOSITION

This media plan was built to deliver awareness and action for the target audiences. Media channels were selected and flighted based on the overall goals of the campaign, combined with our experience within the New Jersey market and syndicated research highlighting where our communities of focus are consuming media. Tactics have been layered to allow for cost-efficient reach and are targeted based on these insights. We have used this combination to deliver strong reach and high frequency among the core targets, demographically and geographically.

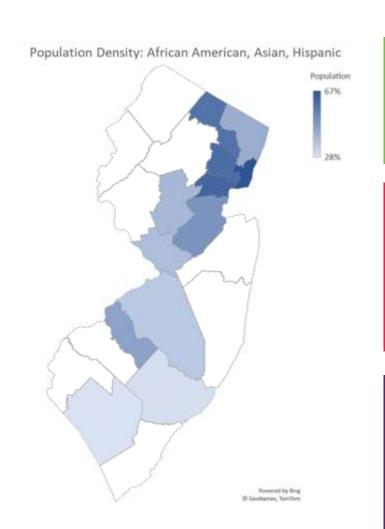
SOCIAL – 43% OF BUDGET YOUTUBE - 10% OF BUDGET SEARCH – 13% OF BUDGET DISPLAY – 34% OF BUDGET

#### TOTAL BUDGET ALLOCATION BY TACTIC





## REACHING MULTICULTURAL AUDIENCES



#### PRINT

#### **Hispanic**

- Reporte Hispano
- •El Especialito
- Americano

#### African American

- Positive Community
- Anointed Journal

#### DIGITAL

- Interest and demo targeting
- Facebook reaches a larger portion of the Hispanic audience with 69% utilizing the platform.
- For **AA** and **Asian** populations, Instagram is more popular reaching 45% and 48%, respectively
- Korea Times and Desi Talk site specific display will be included as platforms where we typically see high engagement within the Asian audience.
- Additional targeted publications will be included in a separate Programmatic PMP buy in order to allow for optimizing to areas of greatest engagement.

Sites that have high penetration to African-

American audiences to be included through

#### RADIO

#### Hispanic

- •WPAT-FM •WSKQ-FM
- •WXNY-FM
- WFMG-AM

#### African Am/Urban

- •WBLS-FM
- •WWPR-FM
- •WDAS-FM
- WUSL-FM
- •WHT7-FM
- •WQHT-FM

#### **Asian American**

•CNN

**Asian American** 

**Asian American** 

•WWTR-AM

WNEW-FM

Desi Talk

•CNBC

- ESPN Deportes
- •Tr3s

TV

Galavision

**Hispanic** 

- Univision
- •TUDN
- Telemundo

#### **African American**

- •BFT
- •VH1
- •OWN
- •ESPN

#### Korea Times

 The Weather Channel FSPN

**Programmatic PMP** 

- WebMD
- AccuWeather
- eBay
- Indeed.com or Indeed Jobs
- Groupon

- CNN
- nytimes.com
- NFL.com or NFL/NFL Mobile
- NBA
- FOX Sports



# SOCIAL MEDIA + YOUTUBE

## \$550KBUDGET \$155,350 GROSS MEDIA SPEND

(53% of Budget)

Estimated Impressions: 26.3M

Social media will remain always on for the duration of the campaign, with specific deployments across platforms, as 54% of our target consumers are spending more than 1 hour/day on social media. For these tactics we will leverage a :15 video asset as well as static creative. YouTube will be 100% Video using the :15 asset. These platforms allow for both interest-based and contextual targeting, where we will seek to drive video views and clicks through traffic-objective campaigns.





**Targeting:** Meta provides us with a high-traffic, reach, and efficient social media opportunity to target residents of New Jersey and those employed in the state as well.

Facebook/Instagram allows us to specifically target based on interest and geographics, with the additional ability to utilize both video and static creative to maximize placements. Interest targeting would include those interested in compensation & benefits (employee), as well as business decision makers (employer).

Performance will be optimized based on creative engagement, with media split between our English/Hispanic targets based on language preferences set by user.

**Targeting:** Twitter ranks in the top 10 as one of the most visited social media apps for our core target. In addition. Twitter can drive considerable website traffic as New Jerseyans tend to use this platform as a supplementary news source. Within Twitter, we can target demographically while also staying brand safe utilizing content adjacency tools to ensure our ads are surrounded by brand-safe content. Keywords like 401k & retirement savings will be utilized to ensure our ads reach our core targets within contextually relevant placements.

Format: 75% video and 25% static Video :15



Targeting: LinkedIn allows for the most targeted approach, as it relates to job titles as well as being contextually aligned, reaching users as they are in the business mindset.

Format: 50% video and 50% static Video:15



**Targeting:** As the second largest search engine, YouTube is critical to any digital strategy. Leveraging a :15 video asset, we will target the general New Jersey public while incorporating relevant segments to reach those who are interested in learning more about retirement savings plans. YouTube allows for content targeting in addition to demo and keyword targeting to help reach our core audiences as well as those in the household.

**Format:** 100% video / :15



Format: 50% video and 50% static Video will be :15 length

# PAID SEARCH

## \$550k BUDGET \$39,000 GROSS MEDIA SPEND

(13% of Budget)
Branded and Non-Branded

We will utilize brand search to capture consumers with high intent and reinforce digital messaging to drive web visits. We will utilize non-brand search to capture consumers who are searching for retirement savings programs and are in lower income brackets. We will optimize consistently based on absolute top impression share.



Coinciding with the launch of digital awareness tactics, paid search will capture the demand generated from that specific messaging. Keywords will focus on general terms like retirement savings and 401k, as well as branded terms to reach high-intent audiences who may already have awareness of the program.

**Targeting:** We will create "branded" campaigns to shepherd active researchers within the state of New Jersey to learn more and "non-branded" campaigns to reach those who are searching for help, but not yet aware of the Secure Choice Savings Program. This will help drive those who are seeking information to the right page to learn more about the program. Within non-brand, bid modifiers will be used to bid up on audiences that are most relevant, e.g., consumers with lower income and employers

Format: Text ads

#### **ONSITE AND OFFSITE SEO**

In order to produce maximum visibility within search engines for both paid and organic rankings Marketsmith will work with NJ Secure Choice to ensure SEO best practices are taken into consideration during website design phase in addition to monthly audits and checklist development. The focus for this effort will be on both front-end content driven SEO as well as back-end technical optimizations.

**Goal:** Rank high within search engine results pages (SERPs) as well as gain incremental organic traffic MOM

**On Page SEO:** Content development and optimization for keyword trends

**Technical SEO:** Enhancing the website backend architecture, continuously looking for broken links, duplicate content, and missing meta descriptions



## DISPLAY

## \$550K BUDGET \$100,100 GROSS MEDIA SPEND

(34% of Budget)

Estimated Impressions: 25M

Programmatic display media allows for granular targeting, a build of frequency, and repetition of messaging to create momentum. Programmatic also can showcase various creative formats to increase overall relevancy, which is crucial to consideration and behavior change.



We use programmatic to build our story to each target audience throughout the campaign, using a mix of audience targeting, behavioral and contextual placements, and both standard and video units in browser on desktop and mobile and in-app.

Targeting: Prospecting audiences would be created using demographics including HHI to ensure we are reaching the core audience, but this will also be overlayed with relevant content targeting. We will include behavioral targeting to reach our audience based on their web behavior and visitation of relevant retirement savings information websites. In addition, utilizing exact Billboard/30 sheet poster locations, exposed audiences would be retargeted on their mobile devices using geo fencing technology.

Format: 50% video and 50% static





# DIRECT MAIL CAMPAIGN

Direct marketing is the foundation that Marketsmith was built on. We've created, executed, and analyzed results of circulation plans for over 300 million mail pieces. Our team of experts can manage every aspect of your campaigns from start to finish, including:

- Circulation planning, including drop timing and testing
- Customer file segmentation
- Prospecting / modeling
- Messaging strategy and creative development
- Full mailing execution, including merge/purge, address hygiene, coding, print shop instructions, and delivery
- Campaign performance tracking, trending to plan and forecasting while mailings are active
- Complete final mailing performance analytics, including key KPIs such as cost to acquire, lifetime value, and customer contribution

Most importantly, Marketsmith integrates and coordinates direct mail with other digital channels to create one multitouch campaigns.

For NJ Secure Choice, we will design a direct mail program that targets business decision makers within organizations that fit within the qualifying parameters. This communication will be strategically placed after our first TV flight in order to further nurture an already aware audience. Leveraging the existing design platform, an oversized postcard will target employers, bringing attention to the benefits outlined within the employer information packet developed by the board prior to program launch.

Direct mail + Digital media increases conversion rates

Consumers who visit a brand website based on direct mail

Consumers who consider direct mail to be more personal than email



# PUBLIC RELATIONS PLAN

137 HOURS LABOR

This campaign, led by Violet PR, will aim to raise awareness for the New Jersey Department of Administration's New Jersey Secure Choice Savings Program. Violet PR will research partnerships and identify events to promote overall awareness and engagement with the program.

**OBJECTIVE:** To increase awareness of the program by leveraging the following tactics:

- **PLANNING:** Violet PR will first meet with key leaders from the team to learn more about the specific program and how that information can be leveraged. From there, we will research, make recommendations, and help plan for conferences and events.
- **PARTNERSHIPS:** Violet PR would collaborate with various organizations that support or represent businesses, including the New Jersey Business Action Center (a current Violet PR / Marketsmith client).
- EVENT PROMOTION: Violet PR will identify 10-15 annual events and conferences hosted by state agencies, community partners, or business organizations that have a shared interest in promoting the program.





### MEASUREMENT - KPIs

Our goal is to increase awareness of the brand-new Secure Choice Savings

Program. In order to measure success, we will focus on website traffic and overall website engagement metrics like bounce rate, time on site, and clicks.

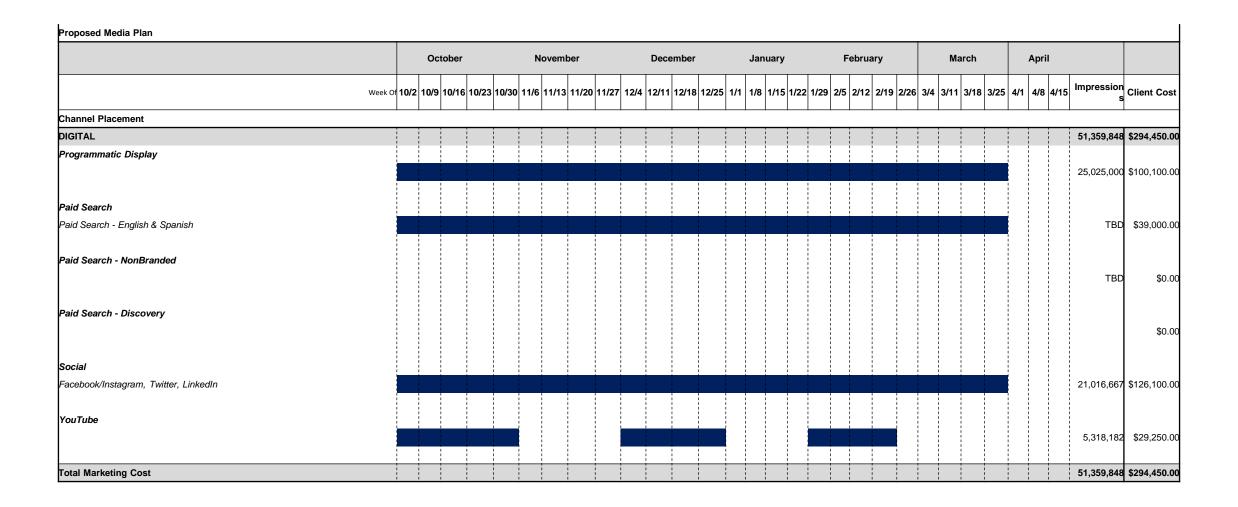
Data measurement ensures that we can drive efficacy and maximize every dollar that the state invests in this critical program.

Gathering and evaluating data are done across every channel on a daily and weekly basis to drive understanding of impact.

CHANNEL	СТА	MEASUREMENT
Overall Campaign	Learn More, Visit .com	Website Visits
Social: Facebook/Instagram, Twitter, Snapchat, LinkedIn, Youtube	Share / Comment / Learn More, Visit .com	Impressions, CTR, Likes, Comments, Shares, Clicks
Paid Search: Google	Learn More, Visit.com	Impressions, Clicks, CTR, CPC
<b>Display:</b> Programmatic	Visit.com	Impressions, Clicks, CTR, CPC



### FLOWCHART





# Fees and Project Management

Response to Section E, Question 1



## SECTION E, QUESTION 1

Section E Question 1: A detailed approach to perform the scope of work reflecting the requirements of the engagement, including, but not limited to, campaign details, collateral, social media plan, media plan, and associated research, including project plan, time frame for project completion, specific description of, and schedule for deliverable items, and a schedule of labor and markup costs associated with specific events and deliverables.



### PROCESS AND PROJECT MANAGEMENT

### **KICKOFF**

- Team introductions
- Goals and objectives review
- Budget review

### **ALIGNMENT**

- Delivery milestones
- Timeline
- RACSI (roles and responsibilities)
- · Project management and accountability

### **DISCOVERY**

- · Market research, focus groups, stakeholder sessions, etc.
- Business and landscape immersion
- Data flow mapping and automation
- Ecosystem analysis

### **DATA ANALYSIS**

- Strategic baseline/framework development
- Goal setting
- Data repository and business rule creation
- Historical learnings review

### **STRATEGY**

- · Communication planning for microtargets
- Touch point mapping by segment
- Targeting matrix
- · Alignment on core objectives and supporting factors

### **PLANNING**

- Cross-functional briefings
- Creative concepting
- Media evaluation and initial planning

### DEVELOP, **DEPLOY**

- Creative services
- Content development
- · Campaign launch
- Tracking and tagging
- Initial campaign QA

### **OPTIMIZATION**

- Ongoing performance analysis
- Constant marketing mix optimization
- Real-time reporting via MarketsmithIQ
- Weekly meetings and quarterly deep dive



### PROJECTTIMELINE

Services Provided	Required Timeframe
Media Planning & Buying	<ul> <li>2 months strategy development, media planning and buying</li> <li>6 months media tactics live and real-time optmization</li> </ul>
Creative Development	<ul> <li>1 month concept development</li> <li>1 month concept selection and refinement</li> <li>3 months tactical creative executions</li> <li>Ongoing trafficking of creative assets</li> <li>Creative refresh 1x within 6-month flight</li> </ul>
Website Development	3-4 month development period
Data/Monitoring	<ul> <li>4-6 weeks - data collection and dashboard build, website tagging and QA, media tagging and QA</li> <li>Ongoing optimization and reporting</li> </ul>
Administrative	<ul><li>Weekly status meetings with day-to-day team</li><li>Monthly billing</li></ul>



### PRICE SHEET

Part A								
Line #	Description	% Markup	Paid Media Price Before Markup	Paid Media Price After Markup				
30	Media Placement Markup	6.00%	\$16,667	\$294,450				
31	Pass-Through Media Placement	N/A	\$277,783	N/A				
32	Pass-Through Media Production	N/A	\$21,911	N/A				
33	Pass-Through Non-Media Production	N/A	\$110,500					

Total Budget	\$550,000
Agency Services Includes creative concepting, account services, video and digital creative production	\$122,913
Production Out of Pocket Includes stock photography/video, translation, and web development	\$132,411
Media Commission (6%)	\$16,667
Net Media	\$277,783

		Part B		
Line #	Description	All-Inclusive Hourly Labor Rate	# of Hours	Total ( Hourly Rate * Hours)
34	President	No Charge	24.0	Waived
35	Senior Account Executive	\$115.00	172.0	\$19,780
36	Account Executive	\$100.00	160.0	\$16,000
37	Advertising Account Manager	\$100.00	0.0	\$0
38	Public Relations Manager	\$120.00	137.5	\$16,500
39	Comptroller	\$120.00	64.0	\$7,680
40	Media Planner/Buyer	\$85.00	432.0	Covered Under Media Commission
41	Senior Art Director	\$120.00	141.5	\$16,980
42	Creative Art Director	\$110.00	46.0	\$5,060
43	Creative Copy Director	\$110.00	68.5	\$7,535
44	Senior Production Director	\$110.00	8.0	\$880
45	Production Art Director	\$110.00	37.0	\$4,070
46	Production Media Director	\$120.00	48.0	\$5,760
47	Production Copy Director	\$110.00	0.0	\$0
48	Marketing Director	\$110.00	143.0	\$15,730
49	Graphic Designer	\$75.00	12.5	\$938
50	Copy Editor	\$100.00	0.0	\$0
51	Copywriter	\$100.00	0.0	\$0
52	Proofreader	\$85.00	0.0	\$0
53	Interactive Director	\$125.00	0.0	\$0
54	Interactive Developer	\$100.00	0.0	\$0
55	Web Designer	\$85.00	0.0	\$0
56	Social Media Director	\$110.00	0.0	\$0
57	Traffic Manager	\$100.00	60.0	\$6,000
58	Administrative Support	\$85.00	0.0	\$0





### PEOPLE. PROCESS. TECHNOLOGY.

The Marketsmith Agency Operations department facilitates and monitors all project management and quality assurance processes.

Within this team, there are seasoned production, project management, and ad operations managers. Each of these roles is critical to our quality monitoring and client communication process. For each type of deliverable, standardized process and protocol are in place.





# SECTION E, QUESTIONS 2-3

**Section E, Question 2:** The proposal shall also include examples of previous campaigns and metrics reached, as well as examples of any applicable resulting behavioral change.

Section, E, Question 3: Vendors shall provide examples of ad campaigns for underserved communities and include examples of translated materials



### MULTICULTURAL AUDIENCES IN NEW JERSEY

Using demographic data as well as syndicated survey data available via MRI, we have isolated media consumption patterns for each of these audiences. In comparing each focus audience to the overall New Jersey population, we have identified media platforms on which these audiences over-index, meaning their rate of consumption is higher than that of the state on average. We have also incorporated specific publications based on audience focus and circulation territory.



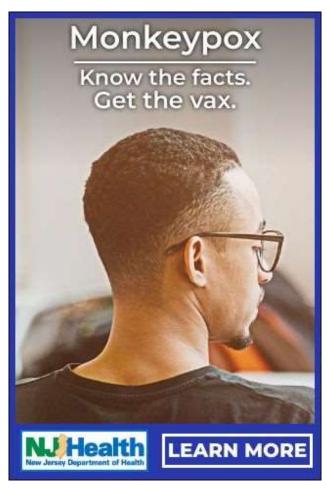
Our ability to create change has been demonstrated through a number of large-scale campaigns that needed to reach the most diverse populations in the state no matter their size. We know that each of the 565 municipalities in the state are unique. We use that in our strategic framework.





### DRIVING AWARENESS FOR A HEALTHIER STATE

Driving action among the hard-to-reach starts with a strategic marketing plan



15.4M Impressions To Date

> 55.5K Clicks To Date

32,979 Website Users To Date SUMMARY: HYPERTARGETING BRINGS HIGHER RETURNS FOR NEW JERSEY. Creative and media placements worked together to form a message that was easy to understand and powerful to drive action.

CHALLENGE: The monkeypox disease was spreading, specifically in underserved communities, and with an urgent need for public awareness, our campaign needed to be executed quickly to prevent cases from increasing and a more widespread impact. The campaign, creative, and media tactics needed to work together to drive an increase in vaccinations and overall awareness.

SOLUTION: It takes a perfect mix of message and media to execute a winning campaign. Working with a limited budget and in a tight time frame, the four-month public awareness campaign, which consisted of TV, radio, out-of-home, and digital, was aimed to educate New Jersey and target communities that are at high risk of attracting the monkeypox disease. This campaign was translated into 10 languages to ensure that the message was understood by diverse populations.

ROLLOUT: We launched an omnichannel campaign guickly to ensure that it was in the public's eye while there were still spikes in the monkeypox disease being reported. We front-loaded the media to increase awareness in November it ran through February. We used a diverse mix of media tactics to reach the LGBTQ+ community across NJ, such as marketing on dating apps and site-specific display. We also produced TV and radio PSAs featuring a representative from the NJDOH to connect with the community.





### DRIVING ENROLLMENT FOR A HEALTHIER STATE

#### Using multimedia to launch GetCoveredNJ as the new state-run healthcare exchange



341,901 New Jersevans signed up as of Jan. 2023

40% Increase in sign ups since 2020

17% Increase in page views YoY

SUMMARY: AGILITY AND REACH ARE ESSENTIAL TO DRIVING ACTION. The ability to quickly promote a program during a limited time period, at a level in which it is seen and felt, can drive great results in a crowded marketplace.

**CHALLENGE:** The state set aggressive enrollment goals with the launch of a brand new offering to New Jersey. It was essential that the GetCoveredNJ campaign be highly visible and impactful for the 3 month time frame. Clear communication was critical to ensure New Jersey residents understood that this was, in fact, a brand-new healthcare marketplace specifically for New Jerseyans and not the federal exchange they may have already been familiar with.

**SOLUTION:** It takes a perfect mix of message and media to execute a winning campaign. Our creative team developed a concept that put the faces of diverse New Jerseyans front and center to emphasize that the new marketplace was designed by New Jerseyans specifically for the people of New Jersey. A range of messages spoke to the biggest questions on everyone's mind: quality, affordability, and choice. We also employed broad and targeted media to build overall awareness of the brand, while also focusing increased spend against key geographies and the uninsured/underinsured population in NJ.

**ROLLOUT:** But messages only matter if they are seen, a job made more challenging when trying to impact audiences that are not easily reached by traditional media placements. Our media teams placed that message across the state, from online to outof-home, TV, even pizza boxes, so that nobody would miss their chance to enroll in the healthcare coverage they and their family not only needed but also had a right to. The initial launch campaign was seen as very successful, and the following two open enrollment campaigns saw even higher enrollments YOY.





### SAVING LIVES WITH MARKETING OUTREACH

Despite the COVID-19 pandemic, Marketsmith exceeded expectations by helping the NJ Department of Human Services connect with more people in need of abuse treatment and recovery than ever before





Sustained Call Volume

Creative Executions SUMMARY: Having a media partner that understands how to connect to niche targets can provide higher engagement and conversion. The ReachNJ campaign drove an immediate spike in call volume (142% in the first month), and as it leveled out, the client saw an overall 54% increase YOY during the same time period. Even throughout the COVID-19 pandemic, the hotline maintained an increase in overall call volume.

CHALLENGE: Inbound call traffic has declined year over year, and the agency depends on that in order to help people who need recovery. The campaign, creative, and media tactics needed to work together to drive an increase in calls and overall service awareness.

SOLUTION: A five month multichannel paid media campaign that consisted of TV, radio, OOH, print, digital, social, and paid search focused on channels that would generate mass impressions and drive awareness. Creative translated in English and Spanish connected with the program's diverse audience.

ROLLOUT: The campaign drove an immediate spike in call volume (142% in the first month) and as it leveled out, the client saw an overall 54% increase YOY during the same time period. Even throughout the COVID-19 pandemic, the hotline maintained an increase in overall call volume.

"ReachNJ understands how difficult it can be to reach out for help. It is here to offer the help people may need to get on the path to recovery."





### PROMOTING THE LEAGUE'S COUNSELING, EDUCATIONAL, AND SOCIAL SERVICES

#### Social media campaign amplifying the work of the Family Service League

to convey.











CHALLENGE: For more than 130 years, Family Service League has strengthened and supported families in need in Essex County, N.J., through counseling, educational, and social services. But during the COVID-19 pandemic, the organization wanted to increase brand awareness to reach more individuals. Violet PR was tasked with reinventing the nonprofit organization's social media channels to raise awareness for its sexual-assault resources, including promoting its monthly coalition for sexual violence awareness and sharing messages of mental health advocacy. Violet PR created a detailed social media content calendar for this six-month project to identify and share the key messages the league wanted

SOLUTION: The Violet PR team drafted posts and created graphics for Family Service League's Facebook and Instagram channels – using a social media management platform to schedule posts three times per week to ensure consistency. Violet PR created content that reflected the Family Service League's tone and themes while also focusing on the league's resources for sexual assault survivors and promoting upcoming events and campaigns, including Luna Fest, Sexual Assault Awareness Month, National Pride Month, Juneteenth, and the Gender Unicorn.

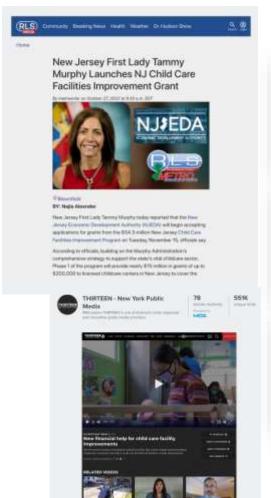
RESULTS: At the end of the campaign, Violet PR was able to share over 275 posts on Family Service League's channels while reaching an audience of over 28,000.





### POSITIONING NEW JERSEY AS AN INNOVATIVE BUSINESS DESTINATION

Highlighting the work of the New Jersey Economic Development Authority (NJEDA)





CHALLENGE: The New Jersey Economic Development Authority (NJEDA), in partnership with diverse stakeholders, implements programs and initiatives that improve quality of life, enhance economic vitality, and strengthen New Jersey's long-term economic competitiveness. Violet PR works to increase exposure and brand awareness with comprehensive campaign strategies for the NJEDA and New Jersey, positioning the state as an innovative business destination.

SOLUTION: Through content ideation, pitching, media relations, and organizing press announcement events, Violet PR develops content for NJEDA leaders that appeared in news outlets across the state, including NJ Spotlight News, PBS Thirteen, Insider NJ, ROI-NJ, and New Jersey Business Magazine, among others. We secured significant coverage for our work promoting New Jersey First Lady Tammy Murphy's \$54.5M Child Care Facilities Improvement Program, as well as NJEDA's Commission on Science, Innovation and Technology's \$1.275 million in grants to support maternal and child well-being.

RESULTS: Violet PR's campaign work has garnered 65 media placements with 425,000 coverage views and 52.1 million impressions.



RACHEL SCHULTIES, COO RSCHULTIES@MARKETSMITHINC.COM | 201-803-6889





### MARKETSMITH IS A STATEWIDE AND LOCALIZED CAMPAIGN SPECIALIST

Marketsmith has had a successful track record of developing, launching, and optimizing statewide campaigns for decades. Our ability to find the hard-to-reach maximizes media reach and frequency for our clients.

#### We understand how to reach hard-to-reach populations for efficient and effective targeting and media initiatives.

Our campaigns address some of the most common socioeconomic factors affecting statewide and localized marketing campaigns, such as:

- Residents in rural or densely populated urban areas
- I ow-income households and communities
- Very young and very old targets
- Undocumented populations
- Non-English-speaking households or communities
- Groups impacted by stigma or cultural injustice
- Disabled or mentally impaired people
- Communities with limited or no internet access

We have developed and implemented a system of media checks and balances, driven by niche targeted strategy, at each level of the funnel. This approach means we are highly successful at acquiring reach and frequency across diverse audiences, nationally, statewide, and on a hyperlocal level.

With audience hypertargeting applied to the media and messaging approach, an increase in engagement and ROI is guaranteed.







### STRATEGIC SERVICES

- Market research and analysis
- Industry assessment
- Targeting strategy

- Brand and engagement strategy
- Purchase journey analysis and optimization



### INTEGRATED MEDIA SERVICES

- Integrated media campaign strategy, negotiation, deployment, and optimization across all available channels
- Public relations
- Full-funnel campaign measurement, testing, and optimization
- Proprietary learning agenda testing panel approach
- Vendor relationships with access to beta platforms and opportunities



### PERFORMANCE MEASUREMENT SERVICES

- Data integration, cleansing, and warehousing
- Predictive performance forecasting
- Consumer cluster analyses
- Trade area and media mix modeling



### CREATIVE SERVICES

- Integrated campaign development
- Content development and editorial
- Full-service graphic design
- Multimedia and 3D rendering

- Experiential design (trade shows, educational, and event exhibits, etc.)
- UX/UI design and email campaigns





### MEET MARKETSMITH INC.



Years average employee tenure



internal promotions

Women

60% 24% 100%

Minority

Woman-owned

































#### **Core Clients**













#### **Regional and Local Clients**

























#### **Direct to Consumer Clients**





















### BRINGING AWARENESS TO THE PROGRAMS THAT MATTER

Marketsmith has the experience it takes to find any hard-to-reach audience across myriad geographies, demographics, and cultures, just as we have done for many nonprofits and state entities. Our campaigns position our clients as a trusted source for relevant, behavior-modifying information.

The success of these types of campaigns hinges on three key factors:

- Research: We must understand the areas of concern or perceived pain points related to the targets across the state.
- <u>Creative</u>: Considering the research phase, we must build an iconic campaign element that can transition across various subtopics, while transforming a single topic into a statewide message.
- Hypertargeted Media: With the ability to find hard-to-reach audiences, we hypertarget unique segments across our intended footprint and reach them via relevant media tactics and with customized messaging.



Partnered with JBWS for over 14 years to spread the message and services offered for domestic violence through research, creative, media support, branding, etc.



Executed multiple omnichannel campaigns supporting the ReachNJ helpline to connect NJ residents with addiction and recovery services. Call volume increased over 50% from 2019 to 2020.



Targeted approach speaking directly to at-risk populations resulted in 730M+ impressions served toward the goal of getting New Jersey vaccinated and boosted.



Dynamic creative optimized for appropriate imagery and language resulted in 75K new enrollments.



Developed an awareness creative and media effort to highlight the valuable programs available to mothers and babies to help reduce overall maternal and infant mortality and morbidity in NJ.







### Monica C. Smith

#### Founder and CEO

LinkedIn: https://www.linkedin.com/in/marketsmithinc/ Email: msmith@marketsmithinc.com Phone: 201.665.8147 Address: 43 E. Fox Chase Road. Chester. NJ 07930

#### **Professional Summary**

Monica founded Marketsmith Inc. in 1999 on the idea that technology and humanity are inextricably linked when it comes to creating successful consumer-centric marketing. Her mission then, as now, was to provide clients with the most advanced tools to build powerful marketing models that mitigate risk, maximize ROI, and drive growth.

She drove Marketsmith Inc. to be one of the largest woman-owned and -operated independent media and marketing agencies in the country. She is considered one of the strongest active CEOs in media today - especially in omnichannel media strategy that drives retail success.

With the 2015 purchase of industry-leading creative agency Brushfire, the engine of creative, analytics, media, and data management was complete. Powered by diverse subject matter experts who share Monica's growth mindset, Marketsmith has become one of the premier martech agencies in the U.S. with a collection of patents and awards to boot.

#### **Professional Experience**

Marketsmith Inc. (Brushfire acquired 2015) Whippany, NJ CEO and Co-Founder 1999 - Present

i Predictus Cedar Knolls, NJ Founder, Chairwoman, CEO 2011 - 2017

Novus Marketing Tarrytown, NY Executive Vice President, Junior Partner 1997 - 1999

Metro Mail, R.R. Donnelley Co. New York, NY Account Executive 1995 - 1997

The Mark Group / Boston Proper Del Ray Beach, FL Circulation Manager 1992 – 1993

Walden Books / Borders Direct Marketing Coordinator 1990 - 1992

#### Not-for-Profit

Bring Dinner Home Co-Founder 2012 - Present

One More Smith Chester, NJ Co-Founder 2005 - Present

#### **Board Position**

New Jersey Tech Council 2016 - 2019

#### Member

New Jersey Pathways to Career Opportunities

#### Member / Investor

Tech Council Ventures Networked Capital 2021 - Present

#### Partnering with NJ Secure Choice Savings Program

Monica will develop and guide the strategic direction and lead the creative development.



### Carina Pologruto

#### **Chief Innovation Officer**

LinkedIn: https://www.linkedin.com/in/carina-pologruto-975a961/

Email: cpologruto@marketsmithinc.com

Phone: 732.322.1629; Address: 774th Street, Somerset, NJ 08873

#### **Professional Summary**

With a track record of assembling high-performing, dynamic teams to implement solutions and lead innovations, Carina is always ready for whatever challenge comes next. Facing and overcoming challenges gives her team a chance to shine and opens new paths to success for Marketsmith Inc. and our clients.

As CIO, Carina ensures that Marketsmith is constantly innovating, that products, services, and media strategies are continually powered by data and science, and that technology is maximized for the best possible outcomes for our clients.

Carina's years of experience have helped her develop expertise across the board in marketing. Her omnichannel knowledge spans all media as well as databases, analytics, forecasting, project management, client communications, and marketing technology platforms.

#### **Professional Experience**

Marketsmith Inc. Whippany, NJ CIO 2019 - Present

Marketsmith Inc. Executive Vice President, Strategy & Innovation 2006 - 2019

Caswell-Massey Edison, NJ Catalog & Internet Marketer 2005 - 2006

#### Partnering with NJ Secure Choice Savings Program

Carina will oversee the teams managing all data, technology, media, and analytical requirements. She will provide strategic quidance on innovative methodologies and ensure that best practices are adhered to.



### Rachel Schulties

#### **Chief Operating Officer**

LinkedIn: https://www.linkedin.com/in/rschulties/ Email: rschulties@marketsmithinc.com Phone: 201.803.6889 Address: 488 Crankshaw Place, Wyckoff, NJ 07481

#### **Professional Summary**

Rachel is a proactive, energetic, and self-starting leader with proven success in performance-based marketing campaigns, long-term client relationships, and operational realignment. As a data-driven professional, her strategies leverage target audience analysis, competitive research, and continuous campaign testing. Rachel excels in highpressure environments and motivates her team members to work toward positions of increased responsibility.

Her years of experience managing account teams exclusively, focused within the higher education vertical, prepared her to lead the charge in driving Marketsmith toward operational excellence. In the past two years, Rachel has focused on implementing tools to drive team efficiency, education programs to fuel intellectual curiosity, and, most important, an onboarding process that seamlessly integrates new clients into our process, ensuring minimal downtime and optimal performance.

#### **Professional Experience**

Marketsmith Inc. Cedar Knolls, NJ Chief Operating Officer 2019 - Present

Digital Media Solutions Paramus, NJ **Executive Vice President** 2017 - 2019

Sparkroom Paramus, NJ Account Supervisor, Sr. Media Strategist 2012 - 2017

Karlitz & Company New York, NY Coordinator, Marketing & Development 2007 - 2008

#### Partnering with NJ Secure Choice Savings Program

Rachel will oversee the teams managing all operations, creative, client performance, and research. She will provide strategic guidance on campaign methodologies and ensure that best practices are adhered to.



### Desiree Maurin

#### Vice President, Client Performance - Lead

LinkedIn: www.linkedin.com/in/desiree-maurin-91baa415/ Email: dmaurin@marketsmithinc.com Phone: 973.879.7347 Address: 13 Woodland Ct., Kinnelon, NJ 07405

#### **Professional Summary**

Desiree is a seasoned professional with proven results in meeting client goals and managing budgets to ensure successful campaigns. Her experience is deeply rooted in the state of New Jersey, and she is highly focused on targeted campaigns that speak directly to segmented audiences.

Desiree proved instrumental in leading the team to surpass the monetary goal for the New Jersey 2018-2019 Tax Amnesty campaign as well as record-breaking enrollment in the 2020-2021 GetCoveredNJ health marketplace open enrollment campaign.

Desiree serves as our in-house expert on regionalized strategy across creative, media, and outcome generation.

#### **Professional Experience**

Marketsmith Inc. Cedar Knolls, NJ Vice President, Client Performance 2013 – Present

**CBA** Industries Elmwood Park, NJ Client Service Manager 2006 - 2013

#### Partnering with NJ Secure Choice Savings Program

Desiree will be responsible for managing the overall strategy and execution of all programs. She will ensure that deadlines, deliverables, goals, and objectives are met.



### Shanna Vella

#### **Director, Client Performance**

LinkedIn: www.linkedin.com/in/shanna-vella-la747819

Email: svella@marketsmithinc.com

Phone: 973.889.0006 Address: 143 Pleasant Ave., Fanwood, NJ 07023

#### **Professional Summary**

Shanna is an experienced and detail-oriented account director, effective at executing and supervising clients' marketing campaigns and cultivating strong working relationships with clients and internal agency teams. She consistently leads the team in achieving and even surpassing client KPIs, as well as having deep knowledge in media performance, creative, and research.

#### **Professional Experience**

Marketsmith, Inc. Lia Sophia Westfield, NJ Whippany, NJ Account Director Jewelry Advisor 2016 - Present 2009 - 2010

Vanguard Temporaries – Universal Music Group JL Media

2008

Union, NJ New York, NY

Media Buyer & Account Manager Business & Legal Affairs

2011 – 2016

William Sullivan Advertising Capital Music Group

Millburn, NJ New York, NY Media Assistant Buyer Publicity Intern

2009 - 2011 2007

#### Partnering with NJ Secure Choice Savings Program

Shanna will be responsible for managing the overall strategy and execution of all programs. She will ensure that deadlines, deliverables, goals, and objectives are met.



### Davey Rosenbaum

#### Sr. Vice President, Research

LinkedIn: www.linkedin.com/in/davey-levin-rosenbaum-97317a1/ Email: drosenbaum@marketsmithinc.com Phone: 973.889.0006 Address: 142 Park Ave., West Caldwell, NJ 07006

#### **Professional Summary**

With experience in marketing strategy, research and evaluation, and communication for broadcast telecommunications companies, market research firms, and nonprofits, Davey's background allows her to contribute to the breadth and depth of the Marketsmith suite of services.

She is responsible for all client competitive, primary, and secondary research, and she interprets the findings to feed internal decisions and client marketing programs as well as new business development activities. Davey recognizes the need for understanding and using market-driven research and survey-generated data to gain a reliable picture of market and consumer dynamics.

#### **Professional Experience**

Marketsmith, Inc. Whippany, NJ Senior Vice President, Research 2003 - Present

Self-Employed New Jersey Strategic Marketing Consultant 1999 - 2003

GTE Worldwide Telecommunications Needham, MA Manager Strategic Marketing 1997 – 1999

McKnight, Buch, Pillsbury & Minneapolis Foundations Minneapolis, MN **Grant Evaluation Consultant** 1989 - 1994

Broadcast/Cable Media Groups Philadelphia, PA & Summit, NJ Manager, Strategic Planning 1979 – 1989

#### Partnering with NJ Secure Choice Savings Program

Davey will be responsible for managing and reporting on all research efforts such as creative testing, perception studies, focus groups, analysis, and service offerings.



### Joseph Sharp

#### VP, Marketing Insights

LinkedIn: www.linkedin.com/in/josephsharpbk/ Email: jsharp@marketsmithinc.com Phone: 917.676.5554 Address: 201 34th St., Brooklyn, NY 11232

#### **Professional Summary**

Joe has 20+ years of experience across a variety of vertical markets, including retail, finance, CPG, automotive, QSR, telecom, entertainment, and tourism. His career has been primarily focused within media planning, research, and analytics. As a data-driven collaborator, he is a relentless team mentor and client advocate, skills that align perfectly with the Marketsmith growth engine mentality.

#### **Professional Experience**

Marketsmith Inc. Whippany, NJ EVP, Brand Strategy 2021 – Present

Allscope Media New York, NY Group Media and Account Director 2015 - 2021

MEC New York, NY Partner, Sr. Director of Communications Strategy, Global Solutions 2013 - 2014

Horizon Media New York, NY Brand Group Director 2005 - 2012

#### Partnering with NJ Secure Choice Savings Program

Joe will manage the team responsible for crafting brand strategy and aligning business goals with media planning and research insights.



### David Milillo

#### VP, Data and Development

LinkedIn: https://www.linkedin.com/in/david-milillo-697184b/ Email: dmilillo@marketsmithinc.com Phone: 973.889.0006 Address: 31 Golfview Lane, Reading, PA 19606

#### **Professional Summary**

David has been engineering data and analytics systems for over 20 years. He manages a team of developers who are responsible for the reception, storage, and presentation for analytics of data for Marketsmith's clients.

He is continuously seeking to learn and utilize the most efficient data and ETL/ELT tactics and tools.

#### **Professional Experience**

Marketsmith, Inc. Whippany, NJ VP, Data & Development 2017 - Present

I.Predictus Whippany, NJ BI Developer 2015 – 2017

RevSite.com Washington, DC Director of Data Management 2015

RCG Global Services Livingston, NJ SQL Server Developer 2014 - 2015

Wellness Corporate Solutions, LLC Bethesda, MD VP, Enterprise Information Technology

2013 - 2014

Gain Capital New York, NY

Manager, Business Intelligence and Information Support

2009 - 2013

Pinpoint Solutions Duncan, SC

Senior Analyst and Database Developer

2003 - 2008

JPMorgan Chase New York, NY

Lead Developer - Associate

2000 - 2003

Sybase Inc Staff Consultant 1997 - 2000

Holon Inc Kyoto, Japan

Programmer Trainee

#### Partnering with NJ Secure Choice Savings Program

David and his team will oversee all data requests and creation of any databases. They ensure that the data utilized by the analysts has undergone quality control and has been cleansed for reporting ease.



### Vince Sia

#### **Senior Art Director**

LinkedIn: www.linkedin.com/in/vince-sia-00ab1697/

Email: vsia@marketsmithinc.com

Phone: 973.462.5184 Address: 6 Eagles Nest Rd., Newton, NJ 07860

#### **Professional Summary**

Vince has over 20 years of experience in designing and creating award-winning campaigns. His ability to tell a story, cause an action, and make a memorable campaign are what truly make him unique. He is versed in all communication channels, and his eye for design moves beyond the computer, as he is a talented artist working in all mediums. Vince is responsible for creating concepts that are strategically sound and that engage the consumer.

Vince is responsible for directing photo and video shoots, casting talent, and final edits to content. He has also been known to produce an original score or two for our clients.

#### **Professional Experience**

Marketsmith, Inc. Cedar Knolls, NJ Senior Art Director 2017 - Present

Communique, Inc. Stanhope, NJ Graphic Designer 1997 – 2015

#### Partnering with NJ Choice Secure Savings Program

Vince is responsible for the design of all marketing and communication material. Vince will also cast talent and direct video and photo shoots.



### Portia DePina

#### Copywriter

LinkedIn https://www.linkedin.com/in/portia-d-696291/ Email: pdepina@marketsmithinc.com Phone: 973.889.0006 Address: 5 Connehasset Rd., Wareham, MA 02571

#### **Professional Summary**

A versatile, eclectic, and adaptable writer, Portia is able to speak to a wide range of audiences. She specializes in B2C, B2B, CPG, long- and short- form copy, email, marketing campaigns, blogging, social media content, print, and digital copy. She also has some marketing experience to boot!

#### **Professional Experience**

Marketsmith. Inc. Whippany, NJ Copywriter 2022 - Present

The Marion Institute Program Coordinator 2020 - 2021

reCommerce Brands Miami, FL Copywriter 2019 - 2020

Beurer North America LP **Content Specialist** 2017 - 2018

#### Partnering with NJ Secure Choice Savings Program

Portia is responsible for all copywriting and content development for campaigns.



### Kaming Liu

#### **Studio Creative Manager**

LinkedIn: www.linkedin.com/in/kaming-liu-1435484/

Email: kliu@marketsmithinc.com

Phone: 973.889.0006 Address: 3 Stacy Court, Randolph, NJ 07869

#### **Professional Summary**

Kaming boasts over 30 years of design experience for both print and digital platforms. He is an expert in creating user-centric websites, online and print marketing initiatives, and consumer loyalty for leading web brands. Kaming is experienced in creating promotional and editorial online content with dedication to creative thinking and user experience.

He has worked on projects for these clients / brands:

Healthcare / Pharma industry: Alcon, Boehringer Ingelheim, Depomed, Forest Laboratories, Novartis, and Sanofi.

Consumer Marketing: AT&T, Hertz, Kraft, Moen, Tristar Products, Brother, Widex, PSE&G

<u>Publishing industry</u>: Budget Travel, Reader's Digest, Penton

B2B: The New England Journal of Medicine, Tourism Ireland

#### **Professional Experience**

Marketsmith, Inc.

Whippany, NJ

Studio Creative Manager

2016 - Present

New York, NY Art Director 1996 - 2012

Franklyn Healthcom

Parsippany, NJ

Art Director / Studio Supervisor

2014 - 2016

The Cooper Union for the Advancement of

Science and Art New York, NY

Aspen Marketing Services – A division of Epsilon Instructor of Computer Design Center

Reader's Digest Association, Inc.

Morristown, NJ

1991 - 1993

Art Director 2013 - 2014

#### Partnering with NJ Secure Choice Savings Program

Kaming will be responsible for the design and creation of communication and marketing components.



### Gina Geary

#### **Senior Project Manager**

LinkedIn: https://www.linkedin.com/in/gina-geary-303b22128/

Email: ggeary@marketsmithinc.com

Phone: 973-889-0006 Address: 1 Gregory Dr., Kenvil, NJ 07847

#### **Professional Summary**

Gina's ability to negotiate began when she worked for a large franchise company, where she developed her project management skills and was able to exceed her goals in closing business deals. Her ability to successfully manage deadlines, staff, and estimating has been key in her career growth. She strives for excellence and looks for innovative ways to improve process.

#### **Professional Experience**

Marketsmith Inc. Cedar Knolls, NJ Director of Business Development 2016 - Present

Subway Development Company Director of Sales and Real Estate 1999 – 2016

#### Partnering with NJ Secure Choice Savings Program

Gina is responsible for creating and managing all production schedules and ensuring that deadlines are met. Gina creates agency estimates, oversees subcontractors, and negotiates rates and usage with production and casting companies.



## Samantha Foy

#### Senior Vice President, Media Strategy & Outcomes

LinkedIn: www.linkedin.com/in/samantha-foy-30054537/

Email: sfoy@marketsmithinc.com

Phone: 551-427-2134 Address: 28 Birch Drive East, Highland Lakes, NJ 07422

#### **Professional Summary**

Samantha is a digital media expert with more than 10 years' experience in planning and executing digital campaigns for clients within all verticals. She has multichannel knowledge, including programmatic, search, and social, as well as media operations, with a keen understanding of how to adjust digital strategy to meet client goals.

Samantha is agile in her ability to adapt to the ever-changing digital marketplace, applying new technology and learnings to constantly improve both media performance and internal operations.

#### **Professional Experience**

Marketsmith Inc. Cedar Knolls, NJ Vice President, Media 2019 - Present

Active International Pearl River, NY Senior Account Director, Client Performance 2013 - 2019

Coldwell Banker Franklin Lakes, NJ Real Estate Agent 2009 - 2011

#### Partnering with NJ Secure Choice Savings Program

Sam will be responsible for strategically developing the media plan to ensure the right tactics are hitting the right targets at the right time, all while considering budget efficiencies and added-value opportunities.





Microsoft Advertising Certified Professional



### Valentina Vizzio

#### Vice President, Media

LinkedIn: https://www.linkedin.com/in/valentinavizzio/ Email: wizzio@marketsmithinc.com Phone: 973.889.0006 Address: 723 Colfax Ave., Pompton Lakes, NJ 07442

#### **Professional Summary**

Valentina is a focused and results-driven strategic leader. She has experience with both digital and traditional media marketing efforts, including TV, radio, and print. She has developed and maintained numerous vendor/affiliate relationships by using her strong interpersonal communication skills.

Valentina is responsible for omnichannel media planning at Marketsmith, from market immersion and research to overseeing the planners and buyers, with ongoing execution, optimization, and campaign performance analysis.

#### **Professional Experience**

Marketsmith Inc. Whippany, NJ Vice President. Media 2022 - Present **Group Director** 2021 - 2022

Citi | Publicis New York, NY Media Activation Manager 2017 - 2021

Sparkroom Paramus, NJ Media Strategist 2012 - 2016

Active International Pearl River, NY Canadian Media Assistant 2010 - 2012

#### Partnering with NJ Secure Choice Savings Program

Valentina will oversee media planning and buying, providing insight on research and campaign performance.



## Ralph Panzullo

### Sr. Production Artist / Web Development

LinkedIn: https://www.linkedin.com/in/rapanzullo/ Email: rpanzullo@marketsmithinc.com

Phone: 973.889.0006 Address: 154 Osprey, Hackettstown, NJ 07840

#### **Professional Summary**

Ralph's proven ability to create mechanicals, digital art files, retouching, and managing website updates make him an invaluable team member. His expertise and attention to detail in producing final art files result are flawless. Ralph continues to seek new skill sets and is always ready for a new challenge.

#### **Professional Experience**

Marketsmith Inc. Whippany, NJ Sr. Production Artist 2004 – Present

Daily Record Parsippany, NJ Paginator 2003 - 2006

#### Partnering with NJ Secure Choice Program

Ralph is responsible for the creation of all art files in various formats, website content/coding updates, and ensurling quality control against specifications.



## Belsy Paternina

### **Accounting Director**

LinkedIn: https://www.linkedin.com/in/belsy-paternina-aa4955a4 Email: bpaternina@marketsmithinc.com Phone: 973.889.0006 Address: 30 Kenwood Rd., Hawthorne, NJ 07506

#### **Professional Summary**

As an accounting professional with over 15 years of experience, Belsy's organizational skills and attention to detail combine with a sense of urgency to ensure there are no issues related to cash flow and transaction recording.

#### **Professional Experience**

Marketsmith Inc. Cedar Knolls, NJ Accounting Director 2010 - Present

KYOCERA Document Solutions America, Inc. Equipment Business Supervisor/Purchasing/Order Fulfillment 2003 – 2008

#### Partnering with NJ Secure Choice Savings Program

Belsy will oversee all financial activity, including invoice creation and submission.



## Christina Forrest

#### Vice President, Violet PR

LinkedIn: https://www.linkedin.com/in/christinaforrestpr

Email: christina@violetpr.com

Phone: 201.790.1179 Address; 166 Paterson Avenue, Midland Park, NJ 07432

#### **Professional Summary**

Christina Forrest has eight years of experience as an award-winning communications professional, crafting forward-thinking media campaigns and social strategies for clients in a variety of industries, including real estate, economic development, transportation, and lifestyle.

#### **Professional Experience**

Violet PR Montclair, NJ Vice President 2014 - Current

Litzky PR Hoboken, NJ PR Assistant 2013 - 2014

#### Partnering with NJ Secure Choice Savings Program

Christina will oversee the Violet PR team's media relations strategy. She will also ensure that estimates and invoices are managed in a timely manner. Christina has managed the NJBAC's PR and media relations strategy for the past 7+ years.



## Rachel Lessig

#### **Account Coordinator, Violet PR**

LinkedIn: https://www.linkedin.com/in/rachellessig/

Email: rachel@violetpr.com

Phone: 646.586.9931 Address: 25 Sunset Lane, Landing, NJ 07850

#### **Professional Summary**

Rachel values relationship-building and collaboration to develop meaningful and successful PR strategies. She is passionate about making a difference in local communities and helping nonprofit organizations achieve their goals. Rachel was awarded the Future PR Pro Award by PRSSA in her senior year. She first joined the Violet PR team as an intern in January 2022 and was hired as an account coordinator following graduation.

#### **Professional Experience**

Violet PR Montclair, NJ Account Coordinator 2022 – Current

Violet PR Montclair, NJ Public Relations Intern Jan. 2022 – June 2022

Social Wise Communications Lanoka Harbor, NJ Public Relations Intern Jun 2021 - Dec 2021

#### Partnering with NJ Secure Choice Savings

Rachel will support on day-to-day activities including social media content creation and engagement.

## ORIGINAL SUBMISSION

The slides that follow include the media approach and strategy that were submitted for the original scope of work on 3/31.



SCOPE OF WORK - MEDIA STRATEGY

# Media Strategy

Marketsmith's expertise is at the intersection of media, marketing, and technology. This approach allows us to connect you to your customers at scale while growing your bottom line. Our strong history of growing and scaling companies from challenger to publicly traded brands is well known and celebrated in the marketing landscape.

We have subject-matter expertise across digital and traditional media channels, and our 100% in-house media department affords us the ability to act quickly and be agile in a time when there are a lot of factors at play.



#### PERCENTAGE OF TOTAL NET AGENCY SPEND 2022















## THREE MULTIMILLION-DOLLAR BUDGET SCENARIOS

As we prepare for the NJ Secure Choice Program to become mandatory for qualified businesses in New Jersey in 2024, it is important to build the brand and bring awareness to qualified NJ residents of the benefits of this program. To achieve this, we have created three budget scenarios for a multimillion-dollar omni-channel campaign. Each incorporates our key targeting principles, core tactics to drive awareness among our audiences, and unique placements to generate breakthrough motivation for our target's moments that matter across a diverse channel and messaging mix.

### **SMALL**

### \$1MM Total Budget

Our lowest budget plan is primarily focused on Outdoor advertising to drive broad exposure throughout the state of New Jersey, incorporating digital tactics to capture and retarget the interest driven by those placements. Social, Search, and Programmatic maintain always-on presence throughout the campaign, with YouTube strategically flighted to maximize impact.

## **MEDIUM**

### **\$2MM Total Budget**

This plan layers in additional coverage on YouTube to be flighted for the totality of the campaign, while also incorporating pulsed flights of Connected TV to expand on the Streaming Video presence. Terrestrial Radio is added in this plan as a cost-effective channel to reach all markets throughout the state, with incremental Digital Billboards included as well. Social, Search, and Programmatic remain as always-on, with Snapchat added as another Social Media platform reaching our target audiences.

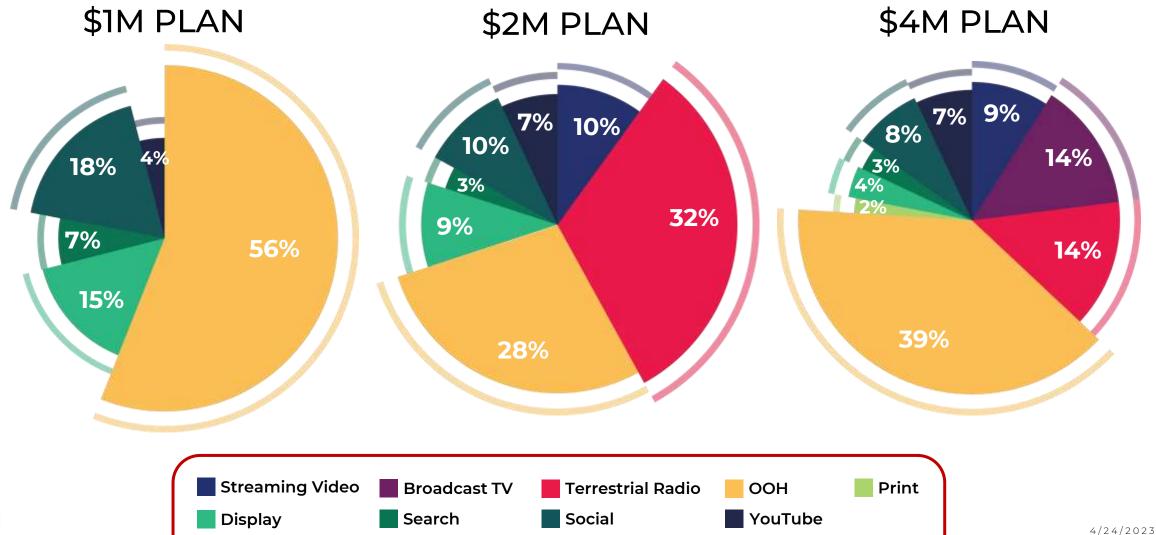
## LARGE

### **\$4MM Total Budget**

Our most robust plan includes additional OOH placements such as Bus Shelters, Bus Kings, Bus Interior Cards, Rail Posters/Screens, and Mall Takeovers, including increased locations of Billboards and 30 sheet posters. This plan is also comprised of 3 flights of Broadcast TV and printed NJ Business magazines to drive maximum reach as we work to build brand awareness and enrollment action. Digital, Streaming Video, and Social tactics are all increased for this plan to continue to capture the demand driven by the broader Awareness tactics.

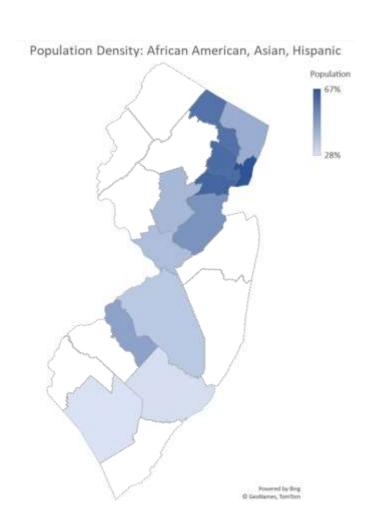


## BREAKDOWN OF TACTICAL COMPOSITION BY PLAN





### REACHING MULTICULTURAL AUDIENCES



#### PRINT

### **Hispanic**

- Reporte Hispano
- •El Especialito
- Americano

RADIO

### African American

- Positive Community
- Anointed Journal

#### DIGITAL

- Interest and demo targeting
- Facebook reaches a larger portion of the Hispanic audience with 69% utilizing the platform.
- For AA and Asian populations, Instagram is more popular reaching 45% and 48%, respectively
- Korea Times and Desi Talk site specific display will be included as platforms where we typically see high engagement within the Asian audience.
- Additional targeted publications will be included in a separate Programmatic PMP buy in order to allow for optimizing to areas of greatest engagement.

Sites that have high penetration to African-

American audiences to be included through

### Hispanic •WPAT-FM

- •WSKQ-FM
- •WXNY-FM
- WFMG-AM

TV

•Tr3s

**Hispanic** 

Galavision

Univision

Telemundo

•TUDN

ESPN Deportes

### African Am/Urban

- •WBLS-FM
- •WWPR-FM
- •WDAS-FM
- WUSL-FM
- •WHT7-FM
- •WQHT-FM

•BFT

•VH1

•OWN

•ESPN

**African American** 

### **Asian American**

•CNN

**Asian American** 

**Asian American** 

•WWTR-AM

WNEW-FM

Desi Talk

•CNBC

### **Programmatic PMP**

- The Weather Channel
- FSPN
- WebMD
- AccuWeather
- eBay
- Indeed.com or Indeed Jobs
- Groupon

- Korea Times
- CNN
- nytimes.com
- NFL.com or NFL/NFL Mobile
- NBA
- FOX Sports



## SOCIAL MEDIA

### \$1MM BUDGET \$121,250 GROSS MEDIA SPEND

(18% of Budget)

Estimated Impressions: 20.2M

### \$2MM BUDGET \$150.000 GROSS MEDIA SPEND

(10% of Budget)

Estimated Impressions: 23.3M

### \$4MM BUDGET \$250,000 GROSS MEDIA SPEND

(8% of Budget)

Estimated Impressions: 39.4M

Social media will run as "always on" across four or five unique platforms, as 54% of our target consumers are spending more than 1 hour/day on social media. For these tactics we will leverage a :30 video asset that will be resized and cut into various lengths in order to maximize our creative resources. These platforms allow for both interest-based and contextual targeting, where we will seek to drive video views and clicks through traffic-objective campaigns.





Targeting: Meta provides us with a high-traffic, reach, and efficient social media opportunity to target residents of New Jersey and those employed in the state as well.

Facebook/Instagram allows us to specifically target based on interest and geographics, with the additional ability to utilize both video and static creative to maximize placements. Interest targeting would include those interested in compensation & benefits (employee), as well as business decision makers (employer).

Performance will be optimized based on creative engagement, with media split between our English/Hispanic targets based on language preferences set by user.



**Targeting:** Twitter ranks in the top 10 as one of the most visited social media apps for our core target. In addition, Twitter can drive considerable website traffic as New Jerseyans tend to use this platform as a supplementary news source. Within Twitter, we can target demographically while also staying brand safe utilizing content adjacency tools to ensure our ads are surrounded by brand-safe content. Keywords like 401k & retirement savings will be utilized to ensure our ads reach our core targets within contextually relevant placements.

Format: 75% video and 25% static Video :30 and :15



Targeting: LinkedIn allows for the most targeted approach, as it relates to job titles as well as being contextually aligned, reaching users as they are in the business mindset.

Format: 50% video and 50% static Video :30 and :15



**Taraetina\*:** To encompass reach across the younger demographic as 34% of our target audience is between the ages of 18 and 34, we have included Snapchat within this media strategy. This platform would be targeted to New Jersey, only serving various cut-down versions of our :30 spot. Creative will be customized to the platform as well. Additional targeting options include HHI, level of education, & occupation

Format: 100% Video

Video: 30 and: 15 \* Snapchat is only included in the 4/24/2023 | 104 \$2M & \$4M budget tiers



Format: 50% video and 50% static Video: 30 and: 15

\$1MM BUDGET \$100,000 GROSS MEDIA SPEND

(15% of Budget)

Estimated Impressions: 18.8M

\$2MM BUDGET \$125,000 GROSS MEDIA SPEND

(9% of Budget)

Estimated Impressions: 21.9M

\$4MM BUDGET \$137,500 GROSS MEDIA SPEND

(4% of Budget)

Estimated Impressions: 31.3M



Programmatic display media allows for granular targeting, a build of frequency, and repetition of messaging to create momentum. Programmatic also can showcase various creative formats to increase overall relevancy, which is crucial to consideration and behavior change.

We use programmatic to build our story to each target audience throughout the campaign, using a mix of audience targeting, behavioral and contextual placements, and both standard and video units in browser on desktop and mobile and in-app.

Targeting: Prospecting audiences would be created using demographics including HHI to ensure we are reaching the core audience, but this will also be overlayed with relevant content targeting. We will include behavioral targeting to reach our audience based on their web behavior and visitation of relevant retirement savings information websites. In addition, utilizing exact Billboard/30 sheet poster locations, exposed audiences would be retargeted on their mobile devices using geo fencing technology.

Format: 50% video and 50% static



## **OUT OF HOME**

### \$1MM BUDGET \$373,640 GROSS MEDIA SPEND

(56% of Budget)

Estimated Impressions: 106M

### \$2MM BUDGET \$405,440 GROSS MEDIA SPEND

(28% of Budget)

Estimated Impressions: 120.6M

### \$4MM BUDGET \$1,301,600 GROSS MEDIA SPEND

(39% of Budget)

Estimated Impressions: 437M

OOH will serve as the daily visual awareness driver for the campaign. These selected placements will be used to strategically enhance visibility within key counties that are not only densely populated, but also reaching the areas that over- index for our target market of employees without a retirement savings plan and decision makers of those relevant companies. Flighting would be pulsed across a six-month span to build brand familiarity.



#### LARGE-FORMAT OOH

- 15-25 static billboards placed across key counties in the state for maximum impact and quick-building reach
- 15-40 digital billboards placed across the state to deliver dynamic and impactful messaging in high-traffic areas
- Heavy up counties include Bergen, Middlesex, Monmouth, Morris, and Mercer



#### 30-SHEET **POSTERS**

• 80-100 posters placed on hightraffic secondary and tertiary roads, reaching local communities and commuters in key counties.



#### TRANSIT ADVERTISING\*

- Bus Kings with bus routes across New Jersey, selecting specific lines and garages from which buses deploy to our focus counties.
- Interior bus cards along the same routes, providing eye-level exposure while commuters are on the bus.
- Bus shelters utilized as key landmarks with eyelevel exposure to both pedestrians and motorists/passengers within priority geographies.
- Rail posters and digital screens across NJ Transit, SEPTA, PATH, and Light Rail platforms within geographies that reach our target audience.



#### MALL TAKEOVERS\*

Shopping mall locations will be included within this campaign at locations in key counties with large food courts to reach the target workforce while they are on their lunch breaks. Example malls include Garden State Plaza, Freehold Mall, Menlo Park Mall, etc. to display large format posters and screens throughout these select malls.



<sup>\*</sup> Transit and Mall placements are only included in the \$4M budget tier.

### PAID SEARCH

### \$1MM BUDGET \$45,000 GROSS MEDIA SPEND

(7% of Budget)

Branded and Non-Branded

\$2MM BUDGET \$50,000 GROSS MEDIA SPEND

(3% of Budget)

Branded and Non-Branded

### \$4MM BUDGET \$125.000 GROSS MEDIA SPEND

(4% of Budget)

Branded and Non-Branded



Utilize Brand Search to capture consumers with high intent and reinforce OOH, TV, Print, Radio, and Digital messaging to drive web visits. Utilize Non-Brand Search to capture consumers who are searching for retirement savings programs and are in lower income brackets. Optimize consistently based on absolute top impression share.

Coinciding with the launch of Awareness tactics, paid search will capture the demand generated from that messaging, as we expect high search volume in the first few weeks with several large-format OOH placements in market and strong TV and Radio presence. Keywords will focus on general terms like retirement savings and 401k, as well as branded terms to reach high-intent audiences.

**Targeting:** We'll create "branded" campaigns to shepherd active researchers within the state of New Jersey to learn more and "non-branded" campaigns to reach those who are searching for help, but not yet aware of the Secure Choice Savings Program. This will help drive those who are seeking information to the right page to learn more about the program. Within non-brand, bid modifiers will be used to bid up on audiences that are most relevant, e.g., consumers with lower income and employers

Format: Text ads

#### **ONSITE AND OFFSITE SEO**

In order to produce maximum visibility within search engines for both paid and organic rankings Marketsmith will work with NJ Secure Choice to ensure SEO best practices are taken into consideration during website design phase in addition to monthly audits and checklist development. The focus for this effort will be on both front-end content driven SEO as well as back-end technical optimizations.

**Goal:** Rank high within search engine results pages (SERPs) as well as gain incremental organic traffic MOM

On Page SEO: Content development and optimization for keyword trends

**Technical SEO:** Enhancing the website backend architecture, continuously looking for broken links, duplicate content, and missing meta descriptions





## STREAMING VIDEO

### \$1MM BUDGET \$27,000 GROSS MEDIA SPEND

(4% of Budget)

Estimated Impressions: 4.9M

### \$2MM BUDGET \$236,000 GROSS MEDIA SPEND

(17% of Budget)

Estimated Impressions: 22.8M

### \$4MM BUDGET \$506,750 GROSS MEDIA SPEND

(16% of Budget)

Estimated Impressions: 44M

Streaming video (Programmatic CTV, Hulu, and YouTube) will be utilized to reach cord-cutters, cord-nevers, and those who rely on streaming via mobile devices for their video entertainment. This is also a cost-effective way to supplement traditional TV placements, ensuring all TV viewers receive our messaging. YouTube will remain as "always on" in the larger budget tiers and pulsed in the \$1M budget to capture our targets while they stream video, as they are notably high users of this medium and significantly over-index on this platform.



#### CONNECTEDTV\*



**Targeting:** CTV allows for targeting based on geography and interests and can ensure coverage across our target audiences. This campaign would include Contextual and Behavioral, targeting NJ Decision Makers of non-Government companies with 25+ employees, as well as NJ employees of these companies. Given that Hulu is one of the top streaming services our target audience uses (next to YouTube), this platform will be included as well. Both tactics will have pulsed flighting throughout the sixmonth campaign, coinciding with Radio and OOH tactics in market.



#### YOUTUBE

**Targeting:** As the second largest search engine. YouTube is critical to any digital strategy. Leveraging a:30 video asset, we will target the general New Jersey public while incorporating relevant segments to reach those who are interested in learning more about retirement savings plans. YouTube allows for content targeting in addition to demo and keyword targeting to help reach our core audiences as well as those in the household.

Format: 100% video / :30 and :15



**Format:** 100% video / :30 and :15

## TERRESTRIAL RADIO

### \$2MM BUDGET \$465,000 GROSS MEDIA SPEND

(32% of Budget)

Estimated Impressions: 24.5M

\$4MM BUDGET \$465,000 GROSS MEDIA SPEND

(14% of Budget)

Estimated Impressions: 24.5M

This target consumer is more reachable via Terrestrial Radio (67%) compared to streaming audio (35%). Terrestrial Radio will serve as one of our main Reach components, targeting listeners throughout the state of New Jersey during peak drive time hours. The stations will remain heavily targeted toward the New York and Philadelphia DMAs, inclusive of Hispanic stations, maximizing exposure. Because of its cost-effective rate and widespread reach, Radio budgets remain the same in both budget tiers, as the Large \$4M budget incorporates additional broad-scale tactics such as Broadcast TV and additional OOH placements.



Terrestrial radio provides opportunity to reach both travelers within the state and commuters during drive times, allowing for cost-effective storytelling with reach and frequency.

Tactical: The plan includes traditional radio in New Jersey, New York, and Philadelphia stations as well as Hispanic stations, focused on the best performing dayparts for each station, including AM/PM drive, mid-day, weekends, and some evenings. Stations covering the top formats for our target will be included as well, such as Urban, Contemporary Hits, and Adult Contemporary.

Format: 100% Audio; :30 second spot/s in English, translated to Spanish









### \$4MM BUDGET \$ 446,000 GROSS MEDIA SPEND

(14% of Budget)

Estimated Impressions: 12M



As budget levels increase, Broadcast TV is included at the largest budget tier to significantly aide in driving awareness of the NJ Secure Choice Program. Pockets of Broadcast TV will flight three times throughout the six-month flight to supplement the Connected TV component, reaching NJ residents across NY and Philadelphia DMAs.

Tactical: Although this consumer is digital centric, about 62% of our target audience are users of TV, with TV being their second-most trusted media source. Live Sports and Early Morning News programs will be of focus, on stations such as NBC, ABC, and FOX.

Broadcast TV will be utilized on New York DMA stations (delivering broad reach to northern NJ counties with dense populations) and Philadelphia DMA stations to reach southern NJ counties.

Format: 100% Video; :30 second spot/s in English

#### **DID YOU KNOW?**

Television reaches 75 – 95% of our audiences in New Jersey across devices, with the highest propensity found in the combined mix of linear TV and streaming services for many of our core targets. This makes television, and the layering of linear and streaming, the single greatest source of outreach to drive awareness



## PRINT

### \$4MM BUDGET \$70,000 GROSS MEDIA SPEND

(2% of Budget)

Utilize specific NJ business magazines to reach decision makers in opportunity counties such as Bergen, Middlesex, Monmouth, Morris, Ocean, and Mercer where general NJ population is dense, but also where the majority of our target employers are located.



Magazines over-index against our Employer target audience, where 62% are reading magazines, so NJ BIZ and ROI NJ will be utilized to increase awareness in a medium that consumers spend time with as part of their daily routine.

Targeting: The plan utilizes NJ BIZ and ROI NJ covering the key counties to reach decision-making employers within NJ that run nongovernment business with more than 25 employees. Both publications will run five insertions across the six-month campaign, with presence on their individual websites as well.

**Format:** Print ads







## DIRECT MAIL CAMPAIGN

Direct marketing is the foundation that Marketsmith was built on. We've created, executed, and analyzed results of circulation plans for over 300 million mail pieces. Our team of experts can manage every aspect of your campaigns from start to finish, including:

- Circulation planning, including drop timing and testing
- Customer file segmentation
- Prospecting / modeling
- Messaging strategy and creative development
- Full mailing execution, including merge/purge, address hygiene, coding, print shop instructions, and delivery
- Campaign performance tracking, trending to plan and forecasting while mailings are active
- Complete final mailing performance analytics, including key KPIs such as cost to acquire, lifetime value, and customer contribution

Most importantly, Marketsmith integrates and coordinates direct mail with other digital channels to create one multitouch campaigns.

For NJ Secure Choice, we will design a direct mail program that targets business decision makers within organizations that fit within the qualifying parameters. This communication will be strategically placed after our first TV flight in order to further nurture an already aware audience. Leveraging the existing design platform, an oversized postcard will target employers, bringing attention to the benefits outlined within the employer information packet developed by the board prior to program launch.

Direct mail + Digital media increases conversion rates

Consumers who visit a brand website based on direct mail

Consumers who consider direct mail to be more personal than email



## PARTNERING WITH VIOLET PR

Marketsmith will be enlisting Violet PR, a New Jersey-based certified small business enterprise, for the PR and editorial portion of this program. Violet PR has a proven track record in conducting successful public relations campaigns for states, regions, and communities, including the New Jersey Business Action Center since 2015.

Violet PR is an award-winning public relations agency specializing in economic development, real estate, and social good. Founded in 2010, Violet PR has earned a stellar reputation among its client base for creativity, personalized service, speed, and results.

The firm's team manages media relations, content development, and social media projects for economic development clients across the U.S. In the last three years, Violet PR has won over 40 national and regional awards for PR and social media excellence, including "Best Boutique Agency" by PR News and Bulldog Reporter.

Their mission is clear: Whether it's rebranding a city, drawing attention to a revitalized neighborhood, or promoting a new sustainable development, Violet PR helps clients make a difference. Through a combination of news stories, social media, and compelling content, our New Jersey-based boutique public relations firm helps clients attract more dollars and supporters.

#### ECONOMIC DEVELOPMENT AND SOCIAL GOOD CLIENTS























#### **AWARDS AND ACCOLADES**





















## PUBLIC RELATIONS APPROACH

Our subcontractor Violet PR has deep experience providing social media, content creation, and media relations services to clients in the economic development and business space. Below is Violet PR's outreach plan/approach for the New Jersey Department of Administration for its New Jersey Secure Choice Savings Program.

MEDIA RELATIONS / EDITORIAL PLACEMENT: Violet PR's team has deep experience providing editorial placement and media relations services to economic development clients. We understand we will be developing a written plan designed to target regional and statewide media. Violet PR will arrange regular media appointments and interviews (in person, Zoom, and phone). Provide briefing documents, sample questions, and background on reporters prior to interviews.

PRESS OUTREACH: We'll strategically pitch and secure media placement for the NJDOA's press releases, announcements, and other important communications. We'll develop media lists and assist in coordinating press conferences, interviews, or other media opportunities for NJDOA executives and Governor Murphy. We'll incorporate stakeholder engagements including coordinating / scheduling informational events surrounding the new program.

SPECIAL EVENTS: We'll work with the NJDOA to promote special events and conferences (in and out of market) where media are most likely to attend to maximize its presence and boost interest.

**SOCIAL MEDIA:** Violet PR provides social media strategy on various channels, including Facebook, LinkedIn, Instagram, TikTok, and Twitter. Violet PR works with clients to create engaging content, produce virtual events and engage with audiences - all through social media.





























## THREE BUDGET SCENARIOS

Violet PR's campaign will work to raise awareness for the automatic enrollment retirement savings program that allows private sector employees to contribute, via payroll deductions, to an IRA or Roth IRA. Below is our outreach plan / approach; we have included more details on our programs and capabilities in specific "tiers" in each category on the following slides.

# **SMALL**

#### **250 HOURS LABOR**

Tactics include planning, partnerships, event promotion, and strategy

# **MEDIUM**

#### **500 HOURS LABOR**

Tactics include planning, partnerships, event promotion, strategy, toolkit, media targets, media pitches, media outreach, and reporting/tracking

# LARGE

### 1,000 HOURS LABOR

Tactics include planning, partnerships, event promotion, strategy, toolkits, media targets, media pitches, media outreach, reporting/tracking, and social media support



## PUBLIC RELATIONS

TIFR 1 250 HOURS LABOR

This "Tier 1" budget campaign, led by Violet PR, will aim to raise awareness for the New Jersey Department of Administration's New Jersey Secure Choice Savings Program. The goal of this campaign will be awareness and action through event management (in-person and virtual).

**OBJECTIVE:** To increase awareness of the program by leveraging the following tactics:

**PLANNING:** Violet PR will first meet with key leaders from the team to learn more about the specific program and how that information can be leveraged. From there, we will research, make recommendations, and help plan for conferences and events.

**PARTNERSHIPS:** Violet PR would collaborate with various organizations that support or represent businesses, including the New Jersey Business Action Center (a current Violet PR / Marketsmith client).

**EVENT PROMOTION:** Identify events and conferences hosted by state agencies. community partners, or business organizations that have a shared interest in promoting the program.

STRATEGY: Violet PR can also recommend social media "events," including LinkedIn and Instagram Live events.



## PUBLIC RELATIONS

TIFR 2 500 HOURS LABOR This "Tier 2" campaign, led by Violet PR, will incorporate the tactics included in the "Tier 1" campaign but will also aim to raise awareness for the New Jersey Department of Administration's New Jersey Secure Choice Savings Program through media relations and event management.

**OBJECTIVE:** To increase awareness of the program by leveraging the following tactics:

**PLANNING:** Violet PR will first meet with key leaders from the team to learn more about the specific program and how that information can be leveraged. From there, we will research, make recommendations, and help plan for conferences and events.

**PARTNERSHIPS:** Violet PR would collaborate with various organizations that support or represent businesses, including the New Jersey Business Action Center (a current Violet PR / Marketsmith client).

**EVENT PROMOTION:** Identify events and conferences hosted by state agencies, community partners, or business organizations that have a shared interest in promoting the program.

STRATEGY: Violet PR can also recommend social media "events," including LinkedIn and Instagram Live events.

**MEDIA TARGETS:** Violet PR will develop a targeted media list for each sector comprised of regional, tri-state, trade, and national reporters covering each industry, along with general economy, economic development, and small business reporters.

MEDIA PITCHES: Draft 3-5 media pitches offering NJDOA leadership and key community leaders/partners as media spokespeople to talk about this campaign. Media pitches will be targeted for each reporter/outlet based on previous coverage and relationships.

**REPORTING/TRACKING:** This includes tracking all news stories that result from the PR campaign and holding weekly calls and meetings with the NJDOA.



## PUBLIC RELATIONS

TIER 3 1,000 HOURS LABOR This "Tier 3" budget campaign, led by Violet PR, will incorporate the tactics included in the "Tier 1" and "Tier 2" campaigns – but will also include budget for **social media strategies** to raise awareness for the New Jersey Department of Administration's New Jersey Secure Choice Savings Program, in addition to **event management** and **media relations**.

**OBJECTIVE:** To increase awareness of the program by leveraging the following tactics:

**PLANNING:** Violet PR will first meet with key leaders from the team to learn more about the specific program and how that information can be leveraged. From there, we research, make recommendations, and help plan for conferences and events.

**PARTNERSHIPS:** Violet PR would collaborate with various organizations that support or represent businesses, including the New Jersey Business Action Center (a current Violet PR / Marketsmith client).

**EVENT PROMOTION:** Identify events and conferences hosted by state agencies, community partnerships, or business organizations that have a shared interest in promoting the program.

**STRATEGY:** Violet PR can also recommend social media strategies, including LinkedIn and Instagram Live events.

**TOOLKIT:** We will compile a toolkit with downloadable materials that can be sent to reporters, with a link to the tool kit as well as featured in social media posts. This toolkit will also include photos, link to resources and graphics, and multicultural brochures.

**MEDIA TARGETS:** Violet PR will develop a targeted media list for each sector comprised of regional, tri-state, trade, and national reporters covering each industry, along with general economy, economic development, and small business reporters.

**MEDIA PITCHES:** Draft media pitches offering NJDOA leadership and key community leaders/partners as media spokespeople to talk about this campaign. Media pitches will be targeted for each reporter/outlet based on previous coverage and relationships.

**MEDIA OUTREACH:** Leverage existing relationships with media (News12, NJ Family, etc.), and our knowledge of the news cycle and reporters' needs, to secure news stories. Follow up with media and tailor pitches according to their areas of interest. We will offer most wanted journalists "advances" on news and will sit in on interviews so we can follow up.

**REPORTING/TRACKING:** This includes tracking all news stories that result from the PR campaign and holding weekly calls and meetings with the NJDOA. **SOCIAL MEDIA SUPPORT:** Violet PR will also strive to ensure that all efforts are carried through to social channels, including:

Optimized profiles (Facebook, Twitter, LinkedIn, and Instagram Recommendations on cadence & calendar (1x-2x weekly)

Collaborate on key marketing topics

Develop several social templates for visual standards

Advise on social hashtag strategy

Consultation & guidance as needed



## MEASUREMENT - KPIs

Our goal is to increase awareness of the brand-new Secure Choice Savings Program. In order to measure success, we will focus on website traffic and overall website engagement metrics like bounce rate, time on site, and clicks.

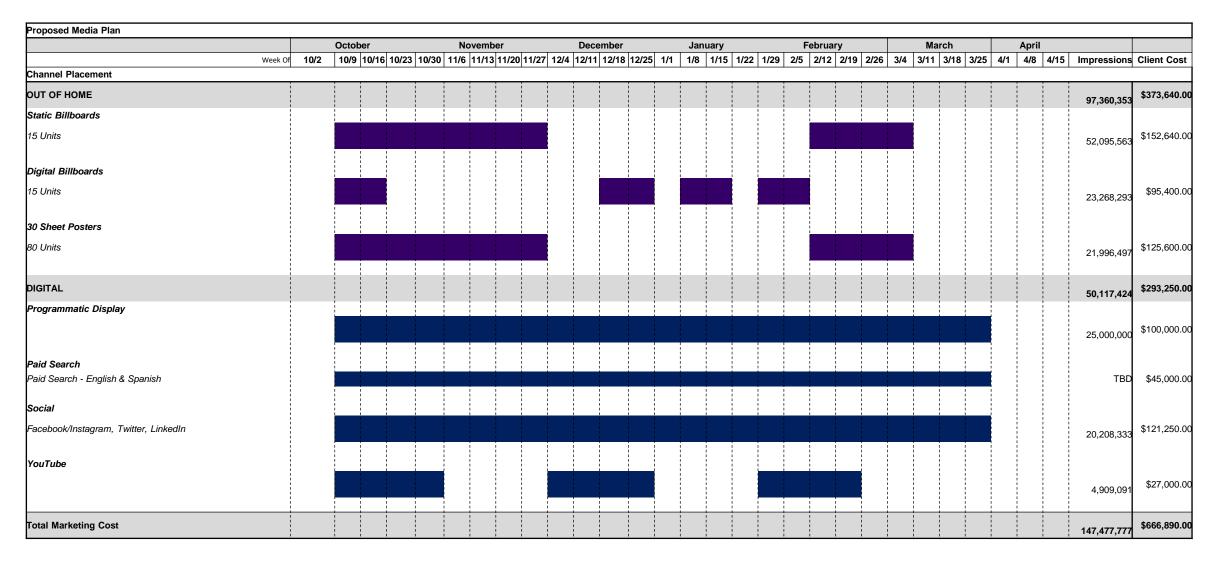
Data measurement ensures that we can drive efficacy and maximize every dollar that the state invests in this critical program.

Gathering and evaluating data are done across every channel on a daily and weekly basis to drive understanding of impact.

CHANNEL	СТА	MEASUREMENT
Overall Campaign	Learn More, Visit .com	Website Visits
<b>Social:</b> Facebook/Instagram, Twitter, Snapchat, LinkedIn	Share / Comment / Learn More, Visit .com	Impressions, CTR, Likes, Comments, Shares, Clicks
<b>Streaming Video:</b> YouTube, Amobee, Hulu	Learn More, Visit .com	Impressions, CTR, Video Completion Rate
OOH: Static Billboards, Bus Kings/Interior cards, Bus Shelter, Mall Takeover, 30-sheet posters	Learn More, Visit .com	Estimated Impressions, Lift in Site Traffic
Paid Search: Google	Learn More, Visit.com	Impressions, Clicks, CTR
<b>Print:</b> Business Publications	Visit.com, Call, QR Code	Website visits, Calls, QR Code Scan
<b>Broadcast TV:</b> New York & Philadelphia Network Television	Visit.com	Estimated Impressions, Lift in Site Traffic
<b>Terrestrial Radio:</b> NY and Philadelphia AM/FM Stations	Visit.com, Call	Estimated Impressions, Lift in Site Traffic
<b>Display:</b> Programmatic	Visit.com	Impressions, Clicks, CTR, CPC

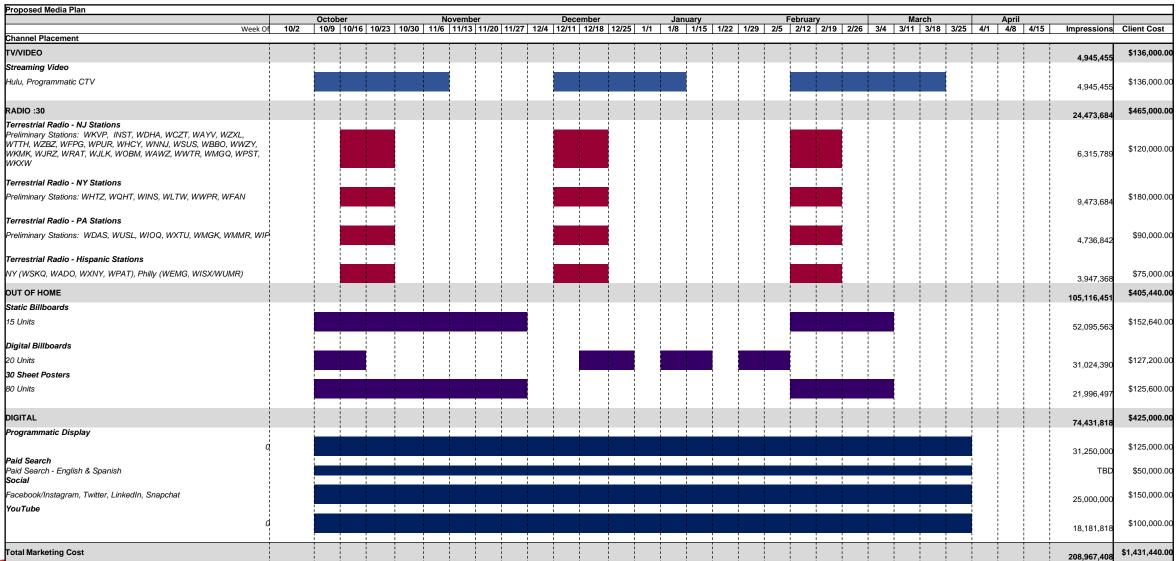


## BUDGET SCENARIO 1 - \$1MM



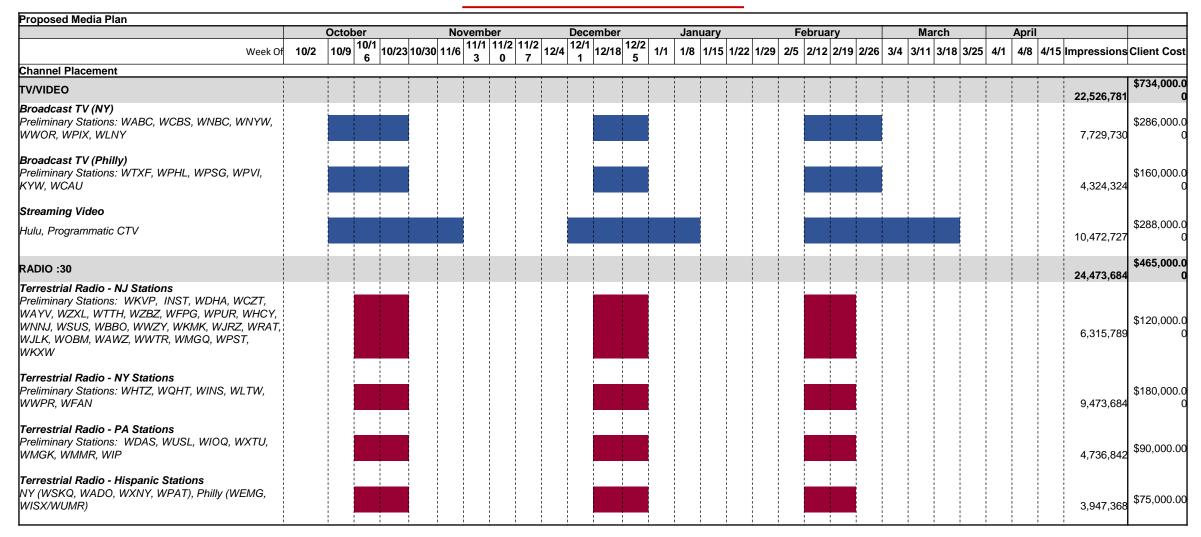


# BUDGET SCENARIO 2 - \$2MM



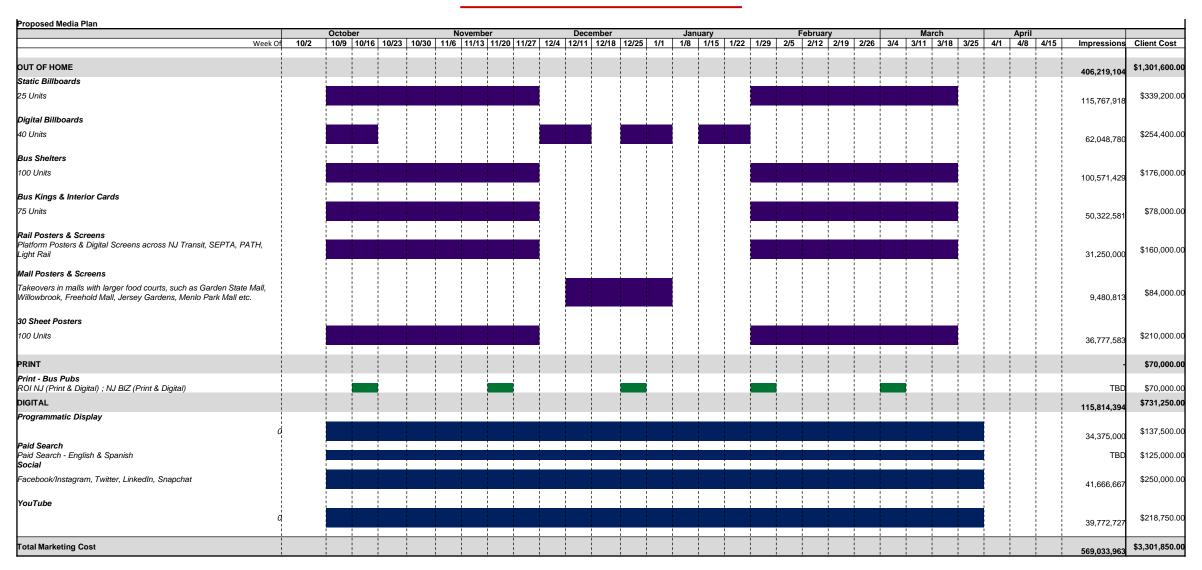


## BUDGET SCENARIO 3 - \$4MM





## BUDGET SCENARIO 3 - \$4MM CONT'ED





## PROJECTTIMELINE

Services Provided	Required Timeframe
Media Planning & Buying	<ul> <li>2 months strategy development, media planning and buying</li> <li>6 months media tactics live and real-time optmization</li> </ul>
Creative Development	<ul> <li>1 month concept development</li> <li>1 month concept selection and refinement</li> <li>3 months tactical creative executions</li> <li>Ongoing trafficking of creative assets</li> <li>Creative refresh 1x within 6-month flight</li> </ul>
Website Development	3-4 month development period
Data/Monitoring	<ul> <li>4-6 weeks - data collection and dashboard build, website tagging and QA, media tagging and QA</li> <li>Ongoing optimization and reporting</li> </ul>
Administrative	<ul><li>Weekly status meetings with day-to-day team</li><li>Monthly billing</li></ul>



# PRICE SHEET - \$1MM

	Part A				
Line#	Description	% Markup	Paid Media Price Before Markup	Paid Media Price After Markup	
30	Media Placement Markup	4.00%	\$37,748	\$666,890	
31	Pass-Through Media Placement	N/A	\$629,142	N/A	
32	Pass-Through Media Production	N/A	\$57,976	N/A	
33	Pass-Through Non-Media Production	N/A	\$113,875		

Total Budget	\$1,000,000
Agency Services Includes creative concepting, account services, video and digital creative production	\$160,943
Production Out of Pocket Includes stock photography/video, translation, web development and out-of-home production	\$171,851
Media Commission (4%)	\$37,748
Net Media	\$629,142

	Part B		
Description	All-Inclusive Hourly Labor Rate	# of Hours	Total ( Hourly Rate * Hours)
President	No Charge	24.0	Waived
Senior Account Executive	\$115.00	172.0	\$19,780
Account Executive	\$100.00	160.0	\$16,000
Advertising Account Manager	\$100.00	0.0	\$0
Public Relations Manager	\$120.00	250.0	\$30,000
Comptroller	\$120.00	64.0	\$7,680
Media Planner/Buyer	\$85.00	432.0	Covered Under Media Commission
Senior Art Director	\$120.00	177.0	\$21,240
Creative Art Director	\$110.00	126.0	\$13,860
Creative Copy Director	\$110.00	97.5	\$10,725
Senior Production Director	\$110.00	20.0	\$2,200
Production Art Director	\$110.00	57.0	\$6,270
Production Media Director	\$120.00	48.0	\$5,760
<b>Production Copy Director</b>	\$110.00	0.0	\$0
Marketing Director	\$110.00	154.0	\$16,940
Graphic Designer	\$75.00	28.5	\$2,138
Copy Editor	\$100.00	0.0	\$0
Copywriter	\$100.00	0.0	\$0
Proofreader	\$85.00	0.0	\$0
Interactive Director	\$125.00	0.0	\$0
Interactive Developer	\$100.00	0.0	\$0
Web Designer	\$85.00	0.0	\$0
Social Media Director	\$110.00	0.0	\$0
Traffic Manager	\$100.00	83.5	\$8,350
Administrative Support	\$85.00	0.0	\$0
	President Senior Account Executive Account Executive Advertising Account Manager Public Relations Manager Comptroller Media Planner/Buyer Senior Art Director Creative Art Director Creative Copy Director Senior Production Director Production Art Director Production Media Director Production Copy Director Marketing Director Graphic Designer Copy Editor Copywriter Proofreader Interactive Director Interactive Developer Web Designer Social Media Director Traffic Manager	Description President President No Charge Senior Account Executive Account Executive Advertising Account Manager Public Relations Manager Senior Art Director Creative Art Director Creative Copy Director Production Director Production Media Director Caphric Designer Copy Editor Copy Froofreader Productive Developer Media Director Copy Director Creative Copy Director Production Copy Director Production Media Director Creative Copy Director Production Director Production Copy Director Production Media Director Production Media Director Production Copy Director Sillo.00 Production Copy Director All-Inclusive Hourly Labor Rate No Charge Sillo.00  \$100.00  \$	Description         All-Inclusive Hourly Labor Rate         # of Hours           President         No Charge         24.0           Senior Account Executive         \$115.00         172.0           Account Executive         \$100.00         160.0           Advertising Account Manager         \$100.00         0.0           Public Relations Manager         \$120.00         64.0           Media Planner/Buyer         \$85.00         432.0           Senior Art Director         \$120.00         177.0           Creative Art Director         \$110.00         126.0           Creative Copy Director         \$110.00         97.5           Senior Production Director         \$110.00         57.0           Production Media Director         \$110.00         57.0           Production Media Director         \$110.00         0.0           Marketing Director         \$110.00         0.0           Marketing Director         \$110.00         0.0           Copy Editor         \$100.00         0.0           Copy Editor         \$100.00         0.0           Interactive Director         \$125.00         0.0           Interactive Developer         \$100.00         0.0           Web Designer         \$



# PRICE SHEET - \$2MM

		Pa	art A	
Line #	Description	% Markup	Paid Media Price Before Markup	Paid Media Price After Markup
30	Media Placement Markup	5.00%	\$68,164	\$1,431,440
31	Pass-Through Media Placement		\$1,363,276	N/A
32	Pass-Through Media Production		\$62,614	N/A
33	Pass-Through Non-Media Production		\$282,500	

Total Budget	\$2,000,000
Agency Services Includes creative concepting, account services, video and digital creative production	\$222,758
Production Out of Pocket Includes stock photography/video, translation, web development and out-of-home production	\$345,114
Media Commission (5%)	\$68,164
Net Media	\$1,363,276

		Part B		
Line#	Description	All-Inclusive Hourly Labor Rate	# of Hours	Total ( Hourly Rate * Hours)
34	President	No Charge	24.0	Waived
35	Senior Account Executive	\$115.00	172.0	\$19,780
36	Account Executive	\$100.00	160.0	\$16,000
37	Advertising Account Manager	\$100.00	0.0	\$0
38	Public Relations Manager	\$120.00	500.0	\$60,000
39	Comptroller	\$120.00	80.0	\$9,600
40	Media Planner/Buyer	\$85.00	400.0	Covered Under Media Commission
41	Senior Art Director	\$120.00	217.0	\$26,040
42	Creative Art Director	\$110.00	166.0	\$18,260
43	Creative Copy Director	\$110.00	129.5	\$14,245
44	Senior Production Director	\$110.00	20.0	\$2,200
45	Production Art Director	\$110.00	63.5	\$6,985
46	Production Media Director	\$120.00	48.0	\$5,760
47	Production Copy Director	\$110.00	0.0	\$0
48	Marketing Director	\$110.00	184.0	\$20,240
49	Graphic Designer	\$75.00	28.5	\$2,138
50	Copy Editor	\$100.00	0.0	\$0
51	Copywriter	\$100.00	0.0	\$0
52	Proofreader	\$85.00	0.0	\$0
53	Interactive Director	\$125.00	0.0	\$0
54	Interactive Developer	\$100.00	0.0	\$0
55	Web Designer	\$85.00	0.0	\$0
56	Social Media Director	\$110.00	96.0	\$10,560
57	Traffic Manager	\$100.00	109.5	\$10,950
58	Administrative Support	\$85.00	0.0	\$0



# PRICE SHEET - \$4MM

Part A					
Line #	Description	% Markup	Paid Media Price Before Markup	Paid Media Price After Markup	
30	Media Placement Markup	4.00%	\$126,994	\$3,301,850	
31	Pass-Through Media Placement	N/A	\$3,174,856	N/A	
32	Pass-Through Media Production	N/A	\$143,825	N/A	
33	Pass-Through Non-Media Production	N/A	\$257,875		

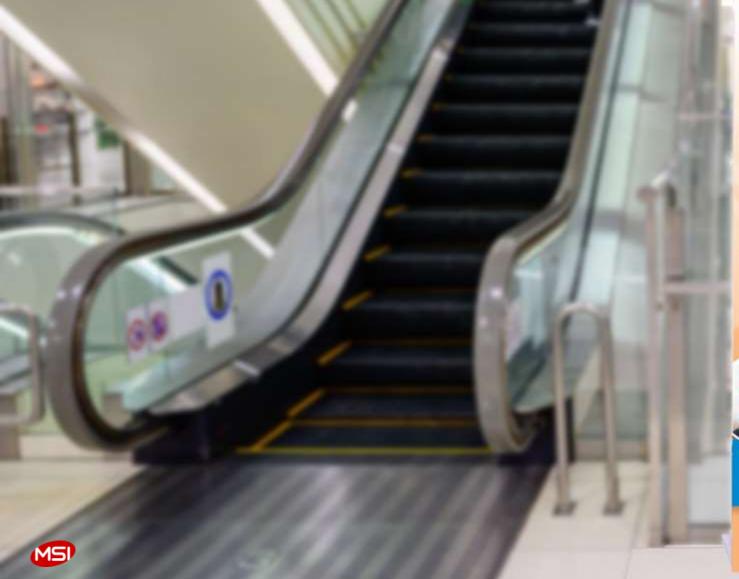
Total Budget	\$4,000,000
Agency Services Includes creative concepting, account services, video and digital creative production	\$293,598
Production Out of Pocket Includes stock photography/video, translation, web development and out-of- home production	\$401,700
Media Commission (4%)	\$126,994
Net Media	\$3,174,856

		Part B		
Line#	Description	All-Inclusive Hourly Labor Rate	# of Hours	Total ( Hourly Rate * Hours)
34	President	No Charge	24.0	Waived
35	Senior Account Executive	\$115.00	172.0	\$19,780
36	Account Executive	\$100.00	160.0	\$16,000
37	Advertising Account Manager	\$100.00	0.0	\$0
38	Public Relations Manager	\$120.00	1,000.0	\$120,000
39	Comptroller	\$120.00	80.0	\$9,600
40	Media Planner/Buyer	\$85.00	400.0	Covered Under Media Commission
41	Senior Art Director	\$120.00	242.5	\$29,100
42	Creative Art Director	\$110.00	166.0	\$18,260
43	Creative Copy Director	\$110.00	141.5	\$15,565
44	Senior Production Director	\$110.00	32.0	\$3,520
45	Production Art Director	\$110.00	75.5	\$8,305
46	Production Media Director	\$120.00	48.0	\$5,760
47	Production Copy Director	\$110.00	0.0	\$0
48	Marketing Director	\$110.00	201.0	\$22,110
49	Graphic Designer	\$75.00	40.5	\$3,038
50	Copy Editor	\$100.00	0.0	\$0
51	Copywriter	\$100.00	0.0	\$0
52	Proofreader	\$85.00	0.0	\$0
53	Interactive Director	\$125.00	0.0	\$0
54	Interactive Developer	\$100.00	0.0	\$0
55	Web Designer	\$85.00	0.0	\$0
56	Social Media Director	\$110.00	96.0	\$10,560
57	Traffic Manager	\$100.00	120.0	\$12,000
58	Administrative Support	\$85.00	0.0	\$0





## MALL STANDEE - EMPLOYER





ff We are creating more opportunities for future retirees and generations of workers to follow. ## Governor Phil Murphy

NJSecureChoice.com



CREATIVE CONCEPTS: DOOR

## MALL STANDEE - EMPLOYER





# NJ'S FIRST RETIREMENT SAVINGS PLAN

OPENING DOORS TO PROSPER, GROW, AND THRIVE.







ff We are creating more opportunities for future retirees and generations of workers to follow. 

Governor Phil Murphy

NJSecureChoice.com



## MALL STANDEE - EMPLOYER





# THE FUTURE IS BRIGHT.



### NJSecureChoice.com

"We are creating more opportunities for future retirees and generations of workers to follow."

- NJ Governor Phil Murphy