

**RHODE ISLAND  
EERMC BRANDING +  
COMMUNICATIONS  
RFP EERMC-2022-4  
TECHNICAL PROPOSAL**



**SUBMITTED  
OCTOBER 28, 2022**

# PROJECT OVERVIEW

Katie Schibler & Associates, LLC d/b/a KSA Marketing is a woman-owned agency with expertise in marketing strategy, brand positioning, and integrated advertising. Since 2011, KSA has grown from a one-woman practice into a full-service agency supporting international brands, government agencies, and growing organizations.

## EXPAND, ENGAGE & INFORM

Our deep bench of strategic communications professionals and partners has allowed KSA to maintain a highly successful record of building strategic communications that meet diverse audiences where they are. As an agency on Rhode Island MPA 479, KSA has experience working with government and quasi-organizations including Commerce RI, Rhode Island Department of Health, URI and more. We welcome the opportunity to partner with EERMC to enhance the Council's distinct



Happy 11th Birthday KSA!

brand awareness and communication tools. KSA's secret sauce is our bold approach and agile branding process. KSA builds kick-ass brands which connect with target audiences through a positioning process utilizing Carl Jung's 12 Archetypes. With an archetype wheel as our guiding star, brand platforms are strategically informed and differentiated. Notable branding clients include: Granny Squibb's Iced Tea, Birdsall & Co., Reade Advanced Materials, Ocean State Harley Davidson, and more.

# WORK PLAN



## Phase 1: Brand Strategy

To develop a comprehensive brand strategy, KSA will complete a marketing & storytelling audit, primary & secondary research, a competitive landscape analysis, audience segmentation, as well as brand archetype mapping. Deliverables will include: Brand Opportunity, Audience Persona(s), and an Early Findings Report.

## Phase 2: Brand Architecture

KSA's agile brand architecture process includes facilitating brand workshops with the EERMC team and stakeholders. Through the workshops, KSA and EERMC will collaborate on key messaging, brand symbols and map brand archetype characters. Deliverables will include a comprehensive brand platform and messaging architecture.

## Phase 3: Brand Identity

Creative Brief + Visual Identity System: This is how we will connect with the audiences' hearts and minds through persuasive copywriting, brand symbols and creative assets. After conducting the visual identity exploration, KSA will create a cohesive visual identity system including the logo, tagline, typography and symbols to bring the brand to life. Final deliverables will include a brand guide, template designs, marketing collateral, photography, and event tabling set-up.

Social Media Strategy + Content Creation: Leveraging the visual identity system, we will then create a turnkey social media strategy designed to support EERMC and stakeholder needs delivering customizable assets, content and execution guidelines.

# WORK PLAN

KSA

## Phase 4: Strategic Planning + Analytics

Once the brand strategy, architecture and visual identity have been established, the next step is to create the marketing plan. The plan will outline how to reach key audiences where they live, learn and play. This is aligned with the assets, tactics, and channels needed for the EERMC to drive timely results within budget. As part of the plan, KSA will conduct a GAP analysis of EERMC's existing communication channels and outreach assets, collaborating with the Council to prioritize what needs be done over the next several years to increase the public's awareness, and support real time outreach addressing the rapidly evolving energy landscape.

Finally this stage will also include creating a robust reporting dashboard to track primary key performance indicators including:

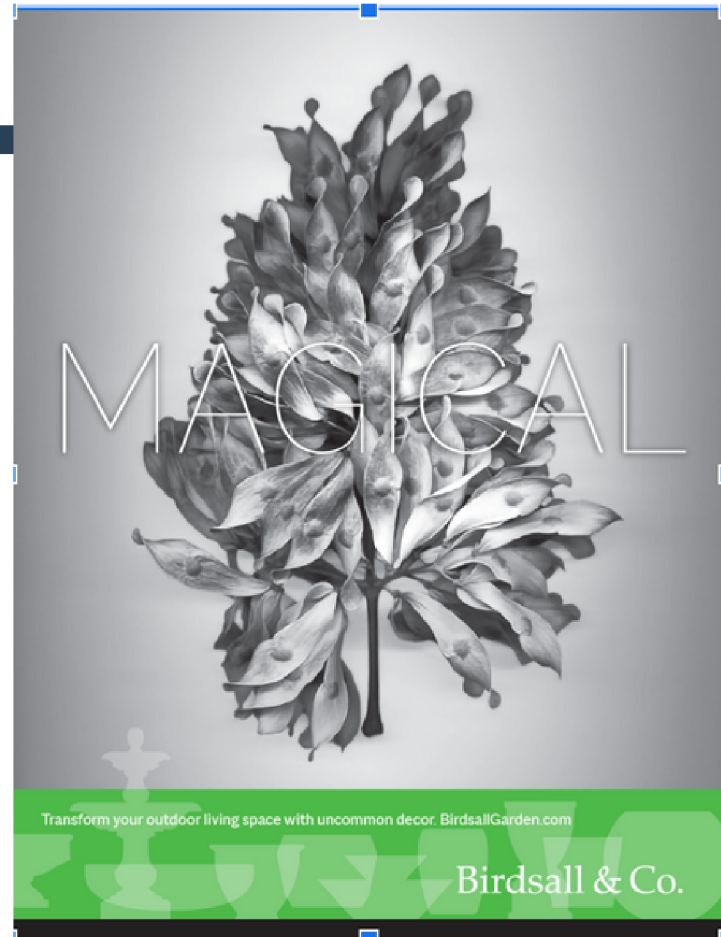
- Analytics, search and conversion tracking
- Flexible analytic reporting
- Issue-driven tracking

## Phase 5: Execution

In addition to the steps and deliverables outlined in Phases 1 - 4, KSA will partner with the EERMC team to execute several components of the marketing plan as budget allows.

At minimum, we have included budget to allow for:

- Public meeting presentation of the final outreach plan and presentation
- Website refresh
- Design of print and event materials



# WORK PLAN



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## Research + Insights

Our team has always placed a high priority on communications that are informed by strong data. Development of a strategically sound brand and communications plan will involve a mix of analytical + qualitative research. Our team of strategists + researchers will not only conduct stakeholder interviews, listening sessions, and immerse themselves in EERMC's existing materials, should future budget allow they can monitor and leverage insights from paid digital advertising to further optimize the communications plan throughout and beyond 2023.

Notable points of difference are:

- Analytics, Optimizations – Analytics is KSA’s essential tool to identify what is working, what isn’t, and what iterative refinements should be made. The team’s focus is always on creating higher ROIs for clients. Media plans cannot be implemented and placed on auto-pilot; they require stewardship and a skilled planning team comfortable with incorporating dynamic updates to optimize each buy. This is where KSA excels.
- Strategic Planning – KSA’s most senior leaders built their portfolios and their chops at agencies held by Publicis and Omnicom. This talent teamed with KSA’s classically trained marketers and subject matter experts brings a broader perspective to the table to address the Council's needs.
- Paid Search – KSA has a strategist with a specialty in SEM. This uniquely delivers for clients a demand generation expertise not measured in clicks and keywords, but instead, is measured in engagement and conversions—what leads to heightened enrollment. This also helps ensure our clients get the maximum return from their search budget every month.

# COMPANY OVERVIEW



**Passionate Tenacity** clients trust our marketing operations center of excellence to manage brand and marketing needs

**Bold Courage** The KSA Way is an agile, rapid delivery process yielding breakthrough results and long-term equity across branding, marketing plans and campaigns

**Kick-Ass Commitment** Experts at segmenting and scaling campaigns for diverse, multi-cultural audiences

**Subject Matter Expertise** Workforce + Economic Development, Education, Manufacturing, Consumer Packaged Goods

- Founded: October, 2011
- Longest standing client relationship: 11+ years
- Average client tenure: 4 years
- Team of 20+ full-time marketing specialists
- Providence Business News "Best Places to Work"
- Goldman Sachs 10,000 Small Businesses Alumni
- Certifications: WOSB, WBENC, RI WBE



## Core Competencies

### Strategy

Marketing Roadmaps +  
Plans  
Branding  
Research  
Reporting + Analytics

### Advertising

Integrated Buys  
Search + Social  
Programmatic  
Geo-fencing

### Creative

Design  
Landing Pages  
Website Development

# RELEVANT EXPERIENCE

## Past Performance

**RI Commerce** created \$1,500,000 in local economic impact as a COVID-19 technical marketing assistance provider for tourism + hospitality businesses

**MassTech Collaborative** won competitive RFP to launch MassMakes manufacturing workforce development initiative

**PepsiCo** 11+ year client relationship, governing global integrated campaign rollouts and overseeing local adaptations for 100+ countries

**Reade Advanced Materials** rebrand, visual identity, SEO, website management, advertising, marketing management, State Trade Expansion Program targeting Latin America

**New England Institute of Technology** agency of record for the Center for Technology and Industry

**University of Rhode Island** won competitive RFP for advertising agency of record

**Case studies and examples of work included in appendix.**



## 2022 CLIENT LIST

### Branding + Full Service

- Birdsall & Co.
- MassTech Collaborative
- New England Institute of Technology
- Ocean State Harley Davidson
- PB&J's
- Reade Advanced Materials
- Rhode Island Department of Health

### Marketing Ops/Advertising

- Dave's Coffee
- The Groden Network
- PepsiCo
- Roots Physical Therapy
- University of Rhode Island
- QML Metals

# STAFF



## EERMC Day-to-Day Team



**Robin McCall**  
Account  
Director,  
Strategic Lead



**Brian Wu**  
Creative Director,  
Visual Identity + Design  
(subcontractor)



**Melanie Roberts**  
Account Manager,  
Day-to-Day Lead



**Jess Federico**  
Advertising Specialist,  
Execution



**Jamie Regan**  
Project Management Specialist,  
Execution



**Nick Bucci**  
Advertising Specialist,  
Execution

Click on names to link to bios



# STAFF + SUBCONTRACTORS



## EERMC Extended Team

**Katie Schibler Conn, Founder** A classically trained marketer, Katie has 25+ years of experience leading integrated marketing initiatives for global brands such as Pepsi, SKYY Spirits, and PlayStation. She is an industry leader, delivering complex marketing campaigns and forging meaningful client partnerships with a focus on workforce and economic development. Katie is a past president of the Association of Marketing Professionals of Rhode Island (AMP-RI), an active member of the Forbes Agency Council, and an alumna of the Goldman Sachs 10,000 Small Businesses program. Providence Business News honored Katie as the 2021 Creative Services Woman to Watch and Enterprising Women Magazine recognized her as an Enterprising Woman of 2022.

**David Bradley, Partner, Director of Digital** Known as KSA's in-house professor, David leads client services, internal staff development and oversees the rollout of all integrated campaigns. Marketing author and education expert, David is a professor of marketing – both literally and figuratively. He's a strategic simplifier, finding the most effective means while efficiently reaching goals. He has authored two books on digital strategy and has been retained by a variety of organizations, from startups to Fortune 100s.



## Subcontractors

Subcontracting needs will be contingent on the final plan and agreed upon deliverables. Most services will be handled in-house; however timing may require additional subcontracting support as identified below.

- Jessica Kerrigan, Content Strategist
- Katherine Major, Public Policy Strategist
- Photographer
- Web Developer

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Conflicts of interest      none

Litigation      none

Investigation      none

### References

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READE Advanced Materials  
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Birdsall Garden Centers  
Morgan Huston  
Marketing Director  
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morgan@birdsallgarden.com



"In the (time) we have been working with KSA, I have learned more about various aspects of my business than in the past eight years! KSA has helped me preserve my lengthy family business history and use that story to connect to today's buyers. Working with KSA is a bit like Christmas...Each meeting is full of unexpected pieces of information, takeaways and insights that are delightful surprises. Thank you KSA for all of your hard work, interest and partnership in marketing our company!"

Elisabeth Law, Director of Marketing  
Reade Advanced Materials

