



STAND UP.
STAND OUT.

February 22, 2024

The Cerrado Group Marketing Discussion & Proposal

Confidential

Introduction

The Cerrado Group represents an evolved idea about the power of a national network of expert TPA organizations presented as preferred partners. Its potential is to be appreciated as an elite group of TPA thought leaders and skilled professional teams that can help elevate partner success.

As a collaborative arrangement of independently owned firms that retain their individual personality, brand, and message, the Group has unique opportunities and faces some unique challenges in achieving its purpose to A: Amplify the Cerrado brand nationally and B: Build engagement with industry referral partners to grow lead generation and relationship generation for its member firms.

The purpose of this document is to recap our understanding of your structure and mission and to discuss how our retirement plan industry-focused fractional CMO + team model may be ideal to help you successfully execute on your goals.

The perspectives and ideas we share here reflect 30+ years of industry experience by each of GSM's partners, Alan Gross and Tom Makeever. We are happy to offer the following recommendations and budget for your consideration.

The Challenge

There are several challenges to growing The Cerrado Group's industry presence and authority. Here's a quick discussion on several we believe are essential to contemplate:

1. **As a collaborative of independently owned and branded TPA expert organizations, The Cerrado Group is an innovative structure without direct peer in the market today.** This differentiation is interesting but also presents challenges in that *it's not immediately clear how this arrangement benefits industry partners.*

As you are no doubt aware, previous affiliated or merged groups made various attempts at describing their value proposition and, by their respective track records, have left the market somewhat unclear about the value presented by a national network of expert organizations. Examples include URPC (now Ascensus), KTRADE, and Alliance Benefit Group.

Proposition to industry:

- a. We are an A-list roster of TPA experts.
- b. We have a deep expert consulting bench to solve problems and create flexible solutions.
- c. We are thought leaders.
- d. We are national.
- e. We help our partners be more successful.



- f. We help our partners reduce risk (operational risk, brand risk, financial risk).

There's no doubt these power statements are true and it's incumbent on both the national entity and individual member firms to bring real energy to the challenge of convincing others why this is so. This is core to achieving primary growth goals.

2. **Today, The Cerrado Group's national profile is not well known.** Consequently, it is likely that member firms are fielding fewer speaking opportunities, RFP opportunities, and other business introductions than should be earned if it were perceived as a "go-to" industry partner.

To create more business opportunities for group members, it's essential to raise the Cerrado Group's profile and stature. Success here requires a sustained commitment of effort, budget, and time to build brand awareness and connections. We'll discuss these here as well.

Note: We looked at the websites of member firms. We found none that mentioned The Cerrado Group on their home page.

3. **"Top-tier is as top-tier does."** This is our take on a Forrest Gump'ism. Translated – it means that to be "top-tier" an organization needs to do the kinds of things other top tier organizations do: Namely present and publish original surveys/research (demonstrating reach and authority), author position pieces and videos on industry topics, host conversations with other leaders (podcasts, webinars, in-person events, etc.). The Cerrado Group does not yet exercise its voice in this fashion.
4. **The whole is greater than the sum of the parts.** The power in The Cerrado Group's message needs to convey there is value in working with a member of this elite national group.
5. **Propositions E and F (above) are about making the case that Cerrado Group members make industry partners more successful.** This message needs to be very clear and voiced by the national office and by all members.
6. **The website needs to make clear:**
 - a. Who we serve / Who our primary audience is
 - b. How we help them be more successful, and
 - c. Why choose us.

The current site, while aesthetically pretty, fails this test. It's a lovely expression of a heartfelt intention, but its message is unclear and its capacity to engage visitors is limited from a performance marketing perspective.

Quick Summary: To reach its goals of enhancing visibility and engagement in the highly competitive retirement plan market, The Cerrado Group needs to clarify its message, unify and elevate its web presence, and undertake a sustained program of expert content development to share as a top-tier player.

Why Do This

1. Make Cerrado Group synonymous with excellence with plan design, administration, and marketing partnership.
2. Create greater awareness for member firms that leads to more proposals and other business invitations.



An untapped opportunity is to leverage the talent pool of the combined leadership team to demonstrate an expert voice that shines a light on both Cerrado and individual member firms. Our goal would be to establish a national presence that creates value for all members and not just those who are more visible. That said, it's inevitable that videos and panel discussions and webinars and other events naturally create follow-on conversations with presenters and authors. It's also important to recognize that firms in this group operate today in geographies that overlap to an extent. Perhaps this has been discussed previously, but we are noting it needs agreement among group members so that lead generation/relationship generation is appreciated as equitable.

Why Do This With Us

GSM is a strategic marketing partner with a unique capability to serve as fractional CMO + team. We're not "yes" men. We are independent, yet highly open-minded thinkers who are focused on the future without "turf" or concern for the history of how the status quo became so.

To us, the role of a CMO is to own or collaborate on strategic vision and marketing road map. In our model, this is a C-level seat at the leadership table to listen, learn, and collaborate to rapidly articulate a plan that reflects firm growth priorities and that translates marketing goals into a multi-faceted, tactical marketing plan of action.

There are several reasons we believe we make great partners. Here are six:

1. The "CMO" role is performed by Alan Gross, an industry professional with 30+ years of experience, supported by a partner with as many years of experience who oversees our operations and team.
2. Our "team" component is a highly talented in-house creative group that has produced every logo, brand, website, video, pitch deck, collateral, webinar event, and more that lives in our portfolio.
3. We control quality, process, and cost in a way that is hard to replicate.
4. We can immediately augment The Cerrado Group leadership team with an independent industry perspective that reflects our deep understanding of this niche and its many and varied constituents.
5. From a production and marketing support perspective, The Cerrado Group gains significant capacity to launch and support products, services, learning events, recruiting events, while growing its sphere of influence through its original voice shared via email, social media, and other avenues.
6. GSM is an expert partner on CRM and marketing automation with experience with multiple platforms and a desire to help the group optimize its potential to cost-effectively quantify marketing activity through data-driven, analytical tools.



Recommendation and Budget

We would be happy to work as CMO + team to support The Cerrado Group. From our perspective, the Group would benefit from an investment in:

1. Reimagining primary messaging and positioning in industry
2. Applying this messaging in national and member marketing and communications
3. A new, dynamic custom website that sets a robust foundation for active marketing
4. A more robust social presence on LinkedIn
5. Thoughtful, integrated campaigns to grow awareness and engagement with industry referral partners
6. Author and publish more original, Cerrado Group-branded content showcasing the expertise of its deep team

Proposed: A budget of \$12,000 per month (\$750 per member firm (current and future))

Naturally, a strategic marketing plan prioritizes and aligns resources and effort to highest value growth goals. And these things take time: To build a new website; to author and shoot original video; to survey clients and others on timely topics; to produce and share podcasts of Group voices and industry peers; to design and launch messaging campaigns.

Our budget recommendation assumes a robust expectation of performance. We are happy to discuss how best to right size the proposal to meet your needs and provide highest priority of our availability. The following table outlines our expectation of potential scope and how we deliver value. Assumed here is an understanding that projects will be scheduled based on agreement about priorities and needs reflected in a new tactical marketing plan.

Our fractional CMO + team model is priced to be highly cost-efficient and vastly more productive than hiring even a single senior marketing professional. In addition, the budget represents significant savings over retail service pricing on an a la carte basis. Please see the following for comparative reference.

PROJECT/CONSULTING (primary scope examples)	GSM LIST	Included in \$12,000/month retainer relationship (12-month minimum term)
<ul style="list-style-type: none"> • CMO Consulting <ul style="list-style-type: none"> ○ Strategic marketing plans ○ Tactical marketing plans ○ StoryBrand messaging framework 	\$7,500 per month	
<ul style="list-style-type: none"> • Website Design/Build <ul style="list-style-type: none"> ○ Custom theme ○ Wordpress architecture ○ Custom sitemap ○ GSM-authored content ○ Support for expert team content ○ Support for active email, social, and event marketing 	\$15,000+	
<ul style="list-style-type: none"> • Video Production Projects 		



<ul style="list-style-type: none">○ Brand /Website videos○ Leader videos○ Podcast episodes	\$3,000-7,500 \$3,000-5,000 \$2,500	
<ul style="list-style-type: none">● Webinar Events<ul style="list-style-type: none">○ Concept to post-production management○ Registration and Promotion○ Event Hosting○ Post-event sharing and Reporting	\$3,750 each	
<ul style="list-style-type: none">● Presentation assets (per)<ul style="list-style-type: none">○ Digital and print collateral○ Marketing templates for email, social, webinar○ Custom PowerPoint Master Decks for pitch decks, client meetings, webinars, events	\$2,000 – 5,000 \$1,500 \$4,500	
<ul style="list-style-type: none">● Email and Social Marketing Campaigns<ul style="list-style-type: none">○ Original design layouts○ Original authoring○ End-to-end process management○ List management and list health○ Monitoring and reporting	\$2,000+ per month	
<ul style="list-style-type: none">● Article authoring / editing	\$1,000+ per pub.	
<ul style="list-style-type: none">● PR authoring / Distribution	\$1,500 per release	

Our focus is captured in our tagline “**Stand up. Stand out.**” That’s what we help clients do every day.

Thanks in Advance

We sincerely appreciate your consideration of GSM and look forward to the opportunity to support your success.

Alan, Tom, and the GSM Team