
The Cerrado Group

Marketing Agency

Request for Proposal

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Primary Contacts

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Section 1: About The Cerrado Group

Company Background

The Cerrado Group is a 503(c)(6) non-profit organization comprised of 17 Retirement Plan Consultants (RPC), also known as Third Party Administrators (TPA). These firms provide plan design, compliance, and day-to-day administration for qualified retirement plans. Each of the firms is independently owned and represent the best in the Industry. One purpose for creating The Cerrado Group was to allow the local, independently owned RPC firm to compete against the National RPC firms by offering the same suite of products and services and the same broad geographical coverage. We also have a tradition of sharing best practices among the members. We are good on our own but unequaled together. We are constantly looking for better ways of doing things, for more efficient processes, and for more ways to add value to our clients. We currently represent +\$49 billion Assets under Administration, +25,000 plans and +889,000 participants.

We sell and administer the following:

- 401(k) Plan Administration and Recordkeeping
- Plan Design and Consulting
- Compliance Testing and Consulting
- Defined Benefit Plans
- Cash Balance Plans
- Plans under IRS or DOL audit
- Technical corrections
- We design and administer ERISA and non-ERISA 403(b), 457(b) both non-profit and governmental and 457(f) plans.
- 3(16) Fiduciary Services
- Actuarial Services
- Recordkeeping services.

Ideal Customer:

- Our business is derived from relationships with Record Keeper Wholesalers, Financial Advisors, Broker Dealers, CPAs and Payroll Companies. Nearly any professional in or adjacent to fields that work with employer sponsored retirement plans can be a source of business.

Current Marketing Technology Stack:

- The Cerrado Group Website- <https://cerradogroup.org/>

List of Competitors:

Primary competitors in the industry:

Futureplan	https://www.futureplan.com
Nova 401(k) Associates	https://nova401k.com/
Definiti LLC	https://definiti.com/
EGPS	https://egps.com/
TRA	https://tra401k.com/
Paychex	https://www.paychex.com/retirement-services
ADP	https://www.adp.com/what-we-offer/benefits/retirement.aspx

Section 2: Program or Project Objectives

Project or Program Objectives:

Below, find a summary of the objectives for the request for proposal.

- **Current Challenge**
The Cerrado Group will celebrate its 3rd anniversary on March 1, 2024. We are gaining recognition within the Industry but need to cement our brand and value with Record Keeper Wholesalers, Financial Advisors and Broker Dealers. They do not have a clear idea of who we are, why we formed and how we can add value to them.
- **Agency Services to Support Objective**
The goal of this project is to create a campaign that will explain who we are and how we can help them sell and retain more plans. We want them to take notice, stir their curiosity and really understand how we can add value. This should drive more phone calls, emails, and business, resulting in increased revenue to the individual members. This campaign needs to create a big impact and we expect that this will be done by various mediums.

Scope of Work:

We expect that this campaign will include marketing pieces, social media campaigns, maybe podcasts etc. How the message is deployed is up to you. Be creative and think outside the box.

One specific item we would like included is a SECURE 2.0 retirement plan tax credit calculator for The Cerrado Group website and that each member could house on their individual websites.

We would also like to discuss how we will quantify the success of the project.

Additional Details:

Program or Project Schedule:

Below is the schedule of our current timeline. It is subject to change.

Project Milestones	Deadline
RFP Delivered to Agency	Feb. 12, 2024
RFP Questions Period Ends	March 4, 2024
RFP Close Date (RFP must be returned no later than this date)	March 25, 2024
Proposal Review (virtual or in person)	April 8 th -12 th
Agency Evaluation	April 22, 2024
Award Project to Agency	May 13, 2024

Section 3: Criteria for Response

Evaluation Criteria:

All proposals will be evaluated against the following criteria. In your response, please be specific about how you meet or do not meet the line item below.

- Pricing. We do not have a set budget for this project. However, we are a non-profit organization and are self-funded. As such, we would like the various components of the campaign to be priced separately.
NOTE: While this RFP applies to work being done for The Cerrado Group, there may be an opportunity to do marketing work for all or some of our members on an individual basis. We would like to see a tiered approach to pricing for this project, based on how many members engage you for their individual firm’s marketing projects.
- Creativity- We don’t want this to look like every other RPC’s marketing programs.
- Content – We will review for originality, authenticity to industry and relevance to the goals provided.

Presentation Proposal Requirements:

With the goal of helping you focus your presentation, we ask that you include the following items in the proposal:

Agency Information:

Help us get to know you better.

- **Corporate Overview:** Including the number of full-time employees, number of contract employees, office location(s), and date founded.
 - Primary markets served
 - Number of customers served
 - Marketing services you offer as an agency

- Marketing services that you currently sub-contract
- Awards won over the past 3 years

Proposed Solution:

- Detailed explanation of the proposed solution
- Make sure to cover all items in the scope of work
- Identify areas of unique expertise
- Share 3 creative examples from prior work to help explain

References

- Minimum of 3 reference customers

Estimated Budget & Project Plan

- Provide a line-item breakdown of costs associated with the full program. Costs should include fixed pricing, variable pricing ranges, any billable hours, travel expenses, etc.
- All proposals must include a project workback schedule that includes:
 - Timelines
 - Key Milestones
 - Delivery Dates

Section 4: Terms and Conditions

This is an invitation for proposal only. The Cerrado Group shall not be obligated in any way to any vendor until a written agreement has been executed.

The Cerrado Group shall not be liable for any costs associated with the preparation of presentation or proposal materials.

While sub-contracting any phase of the work may be considered, the vendor submitting the proposal must assume full responsibility of the end-to-end process. Vendor must disclose if they are using sub-contracted services as part of the proposal.

Any and all verbal discussions and responses are not binding on either party.

The Cerrado Group may issue addenda during the proposal period by the designated official. All addenda become part of the RFP documents and responses must be submitted with the proposal. It is the responsibility of the vendor to establish whether The Cerrado Group has issued any addenda.

This Request for Proposal is proprietary information to The Cerrado Group and must be kept completely confidential.