



# REQUEST FOR PROPOSAL RESPONSE



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Submitted by: Chris Chaia, Founder,  
Onwards Consulting  
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## Program Objectives - Synopsis

### From the Cerrado Group RFP:

- Recordkeepers, Wholesalers, Financial Advisors and Broker-Dealers “do not have a clear idea of who we are, why we formed, and how we can add value to them”.
- Create a campaign that will explain “who we are, and how we can help them sell and retain more plans”.
- The objectives include comments to help them “take notice, stir their curiosity, and understand how The Cerrado Group can add value.”

### From 2/9/24 RFP exploratory call with Ann Slotwinski and Leslie O’Bryan:

- “We want to capture minds and hearts of influencers in the industry” ... “We are missing an elevator pitch.”
- The “framework of the 4-page marketing brochure is not as impactful as it could be.”
- What industry disruptors can do to make a difference, and degree of risk, reward, effort, time, and investment.

## Section 3 (RFP): Criteria for response

### Agency Information

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## My Story

Thank you for the opportunity to bid on The Cerrado Group opportunity. Allow me to share a glimpse of the person behind the company (given my website is under development).

While unconventional for an RFP, telling my personal story is a means for me to share the human that sits behind the company name. From my upcoming website:

*If not now, when? This question, or some variation, has precipitated some of the most meaningful changes in my life and career.*

*When I reflect on my 30-year journey as a marketing executive, business leader, and entrepreneur, it might look like a rollercoaster to some; I like to think of it as hang-gliding over to a fast-paced zipline that ends with a crazy bungee jump into a serene lake – an adventure I wouldn't trade for anything.*

*From working in small business to Fortune 100 firms, to guiding teams and organizations through the twists and turns of growth, I've kept a sense of humor, which has been my secret weapon. Even as a 12-year-old girl serving double-dipped cones at Hayward's Ice Cream stand in Nashua, New Hampshire, my idea of fun on a slow day was concocting "frappes" with everything except ice cream. But I digress.*

*"If not now, when?" It's a seemingly simple question, but it has continuously inspired me to think more deeply, reimagine, visualize, and pursue.*

*Throughout my journey, the support of colleagues, friends, professional business coaches, and family has been indispensable. And every one of those moments of support has shaped how I run my firm, consult, influence, lead, coach, parent, and live – authentically and true to self, with both heart and courage.*

*The name of my firm, Onwards, captures the very essence of my core values: optimism, positivity, growth, and the firm belief that anything is possible! That working together, we can move from one place to a better place. It is my hope that on the other side of every engagement, value, belief, and dream is the type of outcome you deserve.*

*Whether you are a business owner or an individual, I hope our paths cross and I look forward to the opportunity to work together. If not now, when?*



# Why Work with Onwards Consulting

**An embedded leader with a deep understanding of the retirement value chain.**

Wisdom	Credibility	Leadership
<p><b>I know and understand financial services.</b></p> <p>30+ years leading marketing strategy within organizations.</p> <p>Expertise in qualified retirement plans for businesses, nonprofits, and governments, with knowledge of wealth management fin-tech and outsourcing.</p> <p>Experience in smaller (privately-held, private equity owned) and Fortune 100 firms.</p> <p>Unique perspective on the nuances, values, and sensitivities of different operational models.</p>	<p><b>I am a trusted partner in the retirement community.</b></p> <p>Expertise in relationship and channel development, marketing strategy, client communications, business retention, brand management.</p> <p>Trusted to conduct confidential qualitative research and consulting engagements.</p> <p>End-to-end perspective of the retirement ecosystem.</p> <p>Proven collaboration with industry-leading recordkeepers, asset management firms and retirement associations.</p>	<p><b>I champion and steer personal and organizational change.</b></p> <p>Track record spanning three decades in executive leadership, mentoring, motivation, and innovation.</p> <p>Served on Fortune 100 deal team for the acquisition of retirement business.</p> <p>Orchestrated several high-profile M&amp;A communication plans.</p> <p>Honored as a community leader by a national organization, provide mentorship and coaching to emerging leaders.</p> <p>Pursuing International Coaching Federation (ICF) certification (2024).</p>



# Company Overview

## Full Time employees:

1 (with access to freelancers)

## Office location:

Farmington, CT

## Primary markets served:

Financial services and retirement planning (all segments and markets), wealth management, and other professional service firms

## Number of customers served:

Onwards Consulting serves many customers, including prior engagements with several Cerrado Group founding members. The number varies given my business model which offers both leadership coaching and consulting services.

## Marketing services offered as an Agency:

All marketing and communication services, see below.





# Services Offered

These are the following areas of expertise for Onwards Consulting

## Marketing Strategy & Development

- Revenue growth strategies to attract new customers, expand market penetration
- Strategic marketing playbooks, go-to-market launch planning, national campaigns, business process improvement
- Sales targeting and training tools development, digital programs

## Research & Insights

- Independent market research and customer insight to inform product launches, regulatory approach, or service offering.
- Business S.W.O.T. analysis
- Voice of Customer studies to forecast emerging trends, customer sentiments

## Brand & Communications

- Brand perception optimization, sales positioning
- Value proposition discovery
- Sales presentation and customer education material
- Journey mapping (sales, customer)
- Strategic internal and external communication planning, and messaging for sensitive or confidential activities
- Short-form content strategy and creation, e-g., case studies, testimonials, video scripts, website
- Social media digital strategies, company campaigns, and customer engagement strategies

**Additional services:** Time-sensitive or confidential growth initiatives and assignments



### Marketing services sub-contracted:

Onwards Consulting is a full-service consulting agency, with access to freelance writers, designers, and other creative spirits based on the scope and magnitude of each project.

### Awards won over the last three years:

Onwards Consulting celebrates its one-year anniversary on June 1, 2024. I have a 30-year history and reputation as a thought leader, innovator, and the creative spirit behind many programs to help build national awareness while delivering results. The awards I've earned as a Marketing executive throughout my corporate career – pre-solopreneur – were earned (and rightfully enjoyed) as a marketing team for many creative concepts, designs, and program ingenuity (Dose of Reality, WellBusiness, and CustomConsultant, to name a few).

Award-winning programs align with the business strategy for the entire sales funnel from generating awareness to driving consideration to securing the sale.

## Proposed Solution

The Cerrado Group RFP requested the following information: Detailed explanation of proposed solution, scope of work, areas of unique expertise (noted above), and creative examples.

The following proposed solution offers **creativity**, competitive **pricing**, and clever (initial) **positioning** content concepts I am confident will fulfill the evaluation criteria.



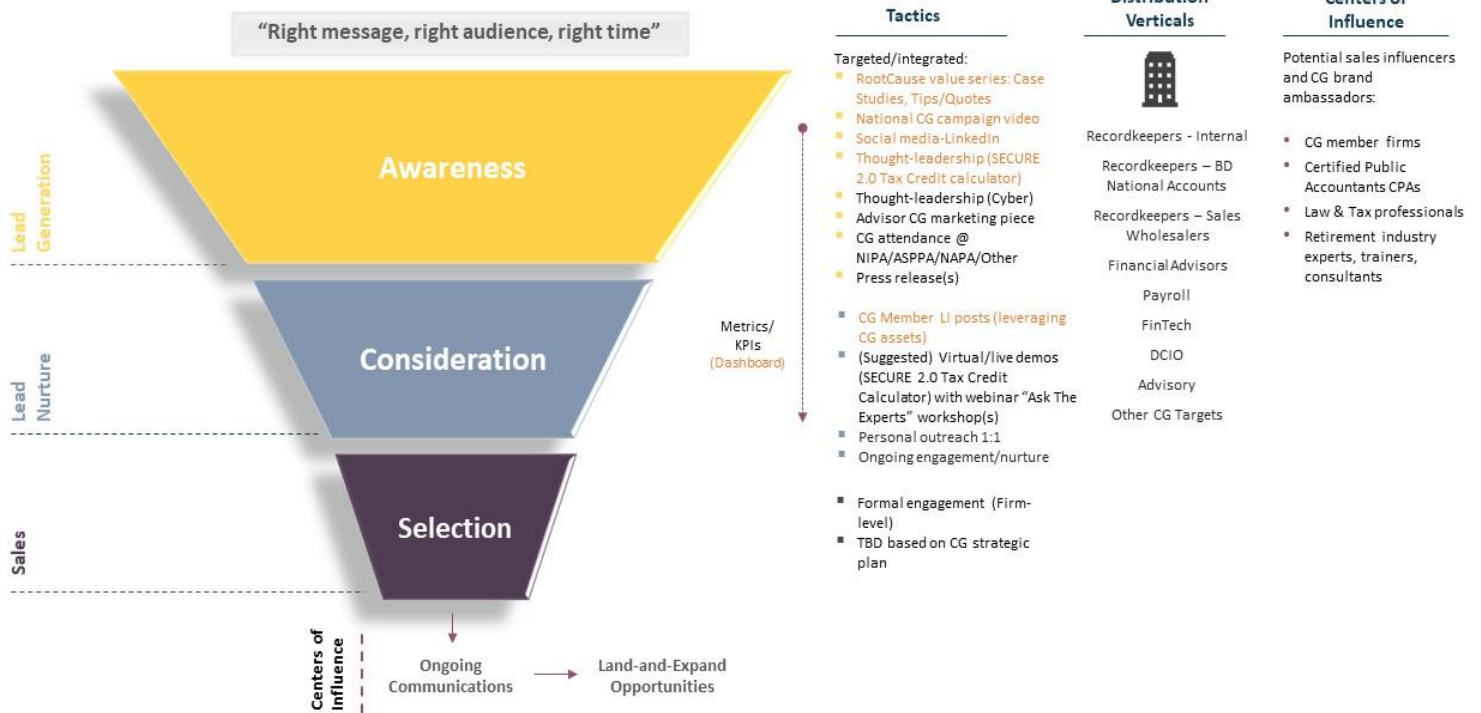
## Your Journey to More Sales

Imagine new business (and relationships) as a giant sales funnel, guiding potential plan sponsors/influencers through a journey.

At the top, there's "Awareness" where you grab attention through various marketing techniques aligned with your strategy. Recognizing the significant impact of consistent engagement is crucial for success. Then comes "Consideration", ideas to help develop and nurture interest. Last is "Selection" where you make the sale, turning friends into advocates and champions of The Cerrado Group.

In orange are the recommended efforts within scope for this engagement. See below for more detail.

## Engagement Funnel







# Recommended Approach & Estimated Budget

This strategy for this proposal is to thoughtfully maximize the investment and reach for *both* The Cerrado Group and Firm Members. Top down – and bottoms up.

Overarching goals for the recommendations aim to:

- Better quantify the numerical value working with Member Firm (hearts, minds...and wallets)
- Build larger community of LinkedIn followers
- Generate activity for website visits, new appointments, greater engagement, reach, and revenue. Ideas offered also can inform the content for future LinkedIn and website opportunities given several observations:
  - **LinkedIn:** 586 CG followers (3/2/24) ~30 posts in 2023 largely featuring vendors, holiday mentions, functional member spotlights - but little thought-leadership.
  - **Website:** “We, Us, You, Together, and Our” used 36 times on the Home Page. Out of scope for this engagement, but observation to “show vs. tell” by considering the creation and promotion of more value/thought leadership.

## Proposed Concept: RootCause value series

- Through story-telling, the concept here is quantifying the value and bottom-line impact when you engage CG Member Firms – show *and* tell
- Series name thoughtfully connects to the brand meaning behind Cerrado Group (CG)
- Raise profile/local PR of independent Member Firm members while also building national brand presence (introduce hashtag #CerradoGroupRootCause)



Description	Featured	Engagement funnel goals	Primary audience	Multi-purpose use	Includes:	Fee
<p><b>RootCause Case Study series (17)</b>            Story-telling. Real-life case studies from each Member Firm on a challenge, how the 'root cause' was identified/fixed, value delivered.</p> <p>Features compelling/impactful stories that helped an advisor/plan sponsor – and the numerical impact of the effort. E.g. How much time/money did you save? What risk was averted? What penalty did you avoid?</p>	17 cases studies that spotlight each Member Firm	Awareness Consideration	Advisors Wholesalers All other sales centers of influence Recordkeepers Other	LinkedIn (primary) Website - CG Websites – Member Firms Other	RootCause strategy Marketing plan Case study worksheet (17 studies, coordinate with all firms directly) Writing and finalizing, one set of revisions, inc. design and all creative CG RootCause animated logo Social post for CG – content for all (17) Email content for 1) CG national office (specific) and 2) TPA Member promotion (templated) Website copy (CG)	\$19,875
<p><b>RootCause Weekly Wisdom series (17)</b>            Member quote on a best practice, idea, technical tip, etc. to build brand(s), with knowledge, expertise, or a competency to support sales professionals</p>	17 unique member firm short-form quotes or technical tips <i>specific to supporting sales success</i>	Consideration	Advisors, Wholesalers, and Sales Centers of Influence	LinkedIn (primary) Website - CG Other	Coordinate with (17) directly, and Ann Social post for CG – content for all (17) Website copy (CG) Create different social media visual(s) for LI use	\$9,350
<p><b>Cerrado Group SECURE 2.0 Retirement Plan Tax Credit Calculator promotion</b></p>	Promote value of the new tax calculator.	Awareness Consideration	Same	Same	Develop promotional language (~1000 words) for use on social, website, etc., working with Ann Content for use by CG and/or Member Firms *Limited information provided in CG RFP. If expectations extend beyond written promotion of the tool/service, fees increase. Does not incl. pricing for content/design for marketing brochure, eBook, etc.	\$2,850



## Proposed Concept: Cerrado Group Brand video

- Elevate and promote brand image and how you are supporting sales/sales centers of influence
- Primary audience: Sales
- Identify key themes of how you provide sales support and develop relationships

Description	Featured	Engagement funnel goals	Primary audience	Multi-purpose use	Includes:	Fee
<p><b>Cerrado Brand Video, incl. promotional assets</b></p> <p>Professional video on why The Cerrado Group, think-tank collective of the best in the industry</p> <p>Outreach post to increase engagement with CG brand; goal to increase LI Followers from 586 to 700 (target up to 20% lift) in 6-9 months with execution of brand video, case studies, etc.</p>	<p>Cerrado value positioning, key themes, why different</p>	<p>Awareness Consideration</p>	<p>Advisors Wholesalers Recordkeepers All other sales centers of influence Other</p>	<p>LinkedIn (primary) Website - CG Websites - Member Firms Email for promotion (templated, for member use) Other</p>	<p>Strategy work Marketing plan Script development (vet with core team of &lt;5), and Ann Script team review, 2 sets of revisions Video development including all creative, design Logos for all member firms featured (brand) LinkedIn social content Website content to promote video Email content to promote video</p> <p><b>*LI admin for CG to coordinate all release details for RootCause series</b></p>	<p>\$14,000</p>
<p><b>Interview and Full Article, featuring Ann Slotwinski, Executive Director</b></p>	<p>In-depth interview conducted on her “why”, how The Cerrado Group is different vs. national firms, and what the market can expect in the future</p>	<p>Awareness</p>	<p>Advisors Wholesalers Recordkeepers All other sales centers of influence</p>	<p>Multi-purpose use (see above)</p>	<p>Meeting(s) with Ann on overarching strategy, talk track document with key Qs and an outline to support interview.</p> <p>Written article with ~1000-1500 words, with one round of revisions (for tone/accuracy and approach)</p> <p>Website and social media content</p> <p><b>*Excludes fee for use as sponsored content for NAPA or other pubs (recommended to pursue)</b></p>	<p>\$2,600</p>



Description	Featured	Engagement funnel goals	Primary audience	Multi-purpose use	Includes:	Fee
<b>Cerrado Group KPI dashboard</b>	Development of a customizable, self-serve one-page dashboard to document baseline metrics with ability to track and measure key performance indicators for web, social, referrals/activity, leads, etc.  *Expectation to work with CG web/team on data	Measurement	Internal Use	Multi-purpose use (see above)	Internal Use for Member meetings, and Exec Director  Self-service PPT chassis, visual format, for easy updates	\$2,450

Fees also factor meeting hours/planning time, assessment of existing Cerrado strategic documents, Member Firm updates, and support of Member Firm communications where needed (working with Ann).



## Estimated Timeline

- All marketing services and deliverables are tentatively scheduled approximately 12-16 weeks from the project start date. The timing (assuming all recommendations implemented) heavily relies on cooperation from Exec Director and all Member Firms.
- **May-June:** Project planning, meetings, input, timing, and development of key baseline deliverables well underway, namely for case study framework. Worksheets to all member Firms. The video strategy to start by mid-May, with signoff and finalized end of June to ensure a end of July release date.
- **End of July (sales season start):** Cerrado Group brand video release to the market
- **Early August:** Ann Slotwinski interview and article, with major social push by all members.
- **August-4Q:** Introduction of RootCause Series for case studies of value delivered/thought- leadership
- **September - Early 2025:** Introduction of RootCause Weekly Wisdom (schedule for visibility)

Assumptions: Deliverables will be staged. This proposal commits to all marketing assets delivered by the end of August, with some a few weeks sooner (all 17 cases studies however, likely phased and fully completed by/in September due to volume).

This also assumes access to key resources in a timely commitment by all Member Firms to ensure deliverables, based on project, allow for timeframes to be met. KPI framework dashboard proposed to be self-supported (if alternative views, an ongoing monthly support fee could be considered).

### Payment

Given the list of proposed deliverables, 60% of the project fee is required at the project start (within 2 weeks). 40% payable at project conclusion. Other details outlined in the formal Terms of Engagement are to follow upon acceptance.





## References

The following references can attest to my work ethic, consulting style, creative ingenuity, and innovative approach.

- Patrick Shelton
- Joe Burt
- Laura Rudzinski
- Lynn Roy

## Work Samples

I have over 30 years leading all facets of marketing, with a very deep understanding of the third-party administration model.

Unfortunately, much of my work is confidential and proprietary (within our industry, and beyond) with signed NDAs. That said and with permission, most recently, I can share that it was my work to orchestrate NIPA's *Unleash Your Able* framework which seeks to overhaul and reimagine education, engagement, and community (over a multi-year period).

**Thank you for the opportunity!**

I'm a partner who loves to lock arms and get to work. It would be exciting to explore where our imagination can lead us on the path to increased awareness...and ultimately, greater sales.

Onwards.