

## RFP: WEST VIRGINIA DEPARTMENT OF COMMERCE

RFP #: CRFP 0327 COM230000001 TECHNICAL PROPOSAL

## SUBMITTED BY:

CRA Communications, LLC DBA Charles Ryan Associates 601 Morris Street, Suite 301, Charleston, WV 25301

PHONE: 304-342-0161 | FAX: 304-342-1941

## **CONTACT:**

Susan Lavenski, CEO slavenski@charlesryan.com

April 18, 2023



Department of Administration Purchasing Division 2019 Washington Street East Post Office Box 50130 Charleston, WV 25305-0130

2023-04-04

13:30

# State of West Virginia Centralized Request for Proposals Service - Prof

Date Issued	Solicitation Closes	Solicitation No	Version
Proc Type:	Central Master Agreement		
·			
Doc Description:	ADVERTISING SERVICES		
Proc Folder:	1146311		Reason for Modification:

COM2300000001

0327

## **BID RECEIVING LOCATION**

**BID CLERK** 

2023-03-01

DEPARTMENT OF ADMINISTRATION

PURCHASING DIVISION 2019 WASHINGTON ST E

CHARLESTON WV 25305

US

VENDOR

Vendor Customer Code: VS0000007330

Vendor Name: CRA Communications, LLC dba Charles Ryan Associates

Address: 601 Morris St., Ste. 301

Street: Morris Street

City: Charleston

State: WV Country: USA Zip: 25301

CRFP

Principal Contact: Susan Lavenski

Vendor Contact Phone: 304-545-8006 Extension:

FOR INFORMATION CONTACT THE BUYER

Toby L Welch (304) 558-8802 toby.l.welch@wv.gov

Vendor Signature X

FEIN# 47-4931131

**DATE** April 18, 2023

All offers subject to all terms and conditions contained in this solicitation

 Date Printed:
 Mar 1, 2023
 Page:
 1
 FORM ID: WV-PRC-CRFP-002 2020\05

#### **ADDITIONAL INFORMATION**

Request for Proposal:

The West Virginia Department of Administration, Purchasing Division (hereinafter referred to as the "Purchasing Division") is issuing this solicitation as a request for proposal ("RFP"), as authorized by W. VA. Code 5A-3-10b for the West Virginia Department of Commerce (hereinafter referred to as "Commerce") to provide an advertising services contract for multiple agency use that will be administered by the West Virginia Commerce and the West Virginia Tourism Office (Commerce and the Tourism Office will be collectively referred to as "the Agencies".) per the attached documentation.

\*\*\*\* Online responses have been prohibited for this solicitation, if you have questions contact the Buyer - Toby Welch @ toby.l.welch@wv.gov

See attached instructions for requirements for responding.

INVOICE TO	SHIP TO
DEPARTMENT OF COMMERCE	DEPARTMENT OF COMMERCE
BLDG 3 SUITE 800	BLDG 3 SUITE 600
1900 KANAWHA BLVD E	1900 KANAWHA BLVD E
CHARLESTON WV 25305	CHARLESTON WV 25305
US	us

Line	Comm Ln Desc	Qty	Unit of Measure	Unit Price	Total Price
1	Advertising agency services				

Comm Code	Manufacturer	Specification	Model #	
82101800				

#### **Extended Description:**

Advertising agency services

SCHEDULE OF EVENTS		
Line	Event	Event Date
1	Questions are due by 4:00 p.m.	2023-03-17

Page: 2

FORM ID: WV-PRC-CRFP-002 2020\05

	Document Phase	Document Description	Page 3
COM2300000001	Final	ADVERTISING SERVICES	

## ADDITIONAL TERMS AND CONDITIONS

See attached document(s) for additional Terms and Conditions

**DESIGNATED CONTACT:** Vendor appoints the individual identified in this Section as the Contract Administrator and the initial point of contact for matters relating to this Contract.

(Printed Name and Title) Susan Lavenski, Chief Executive Officer
(Address)601 Morris St., Ste. 301, Charleston, WV 25301
(Phone Number) / (Fax Number)304-545-8006/304-342-1941
(Email address)slavenski@charlesryan.com
CERTIFICATION AND SIGNATURE: By signing below, or submitting documentation through wvOASIS, I certify that: I have reviewed this Solicitation/Contract in its entirety; that I understand the requirements, terms and conditions, and other information contained herein; that this bid, offer or proposal constitutes an offer to the State that cannot be unilaterally withdrawn; that the product or service proposed meets the mandatory requirements contained in the Solicitation/Contract for that product or service, unless otherwise stated herein; that the Vendor accepts the terms and conditions contained in the Solicitation, unless otherwise stated herein; that I am submitting this bid, offer or proposal for review and consideration; that this bid or offer was made without prior understanding, agreement, or connection with any entity submitting a bid or offer for the same material, supplies, equipment or services; that this bid or offer is in all respects fair and without collusion or fraud; that this Contract is accepted or entered into without any prior understanding, agreement, or connection to any other entity that could be considered a violation of law; that I am authorized by the Vendor to execute and submit this bid, offer, or proposal, or any documents related thereto on Vendor's behalf; that I am authorized to bind the vendor in a contractual relationship; and that to the best of my knowledge, the vendor has properly registered
By signing below, I further certify that I understand this Contract is subject to the provisions of West Virginia Code § 5A-3-62, which automatically voids certain contract clauses that violate State law; and that pursuant to W. Va. Code 5A-3-63, the entity entering into this contract is prohibited from engaging in a boycott against Israel.
CRA Communications, LLC (Corpany)
(Signature of Authorized Representative) Susan Lavenski, Chief Executive Officer April 18, 2023 (Printed Name and Title of Authorized Representative) (Date) 304-545-8006/304-342-1941 (Phone Number) (Fax Number)
slavenski@charlesryan.com

(Email Address)

## ADDENDUM ACKNOWLEDGEMENT FORM SOLICITATION NO.: CRFP COM23\*001

Instructions: Please acknowledge receipt of all addenda issued with this solicitation by completing this addendum acknowledgment form. Check the box next to each addendum received and sign below. Failure to acknowledge addenda may result in bid disqualification.

Acknowledgment: I hereby acknowledge receipt of the following addenda and have made the necessary revisions to my proposal, plans and/or specification, etc.

necessary revisions to my proposal, plans and/or specification, etc.
Addendum Numbers Received: (Check the box next to each addendum received)
✓ Addendum No. 1 ☐ Addendum No. 6   ✓ Addendum No. 2 ☐ Addendum No. 7   ☐ Addendum No. 3 ☐ Addendum No. 8   ☐ Addendum No. 4 ☐ Addendum No. 9   ☐ Addendum No. 5 ☐ Addendum No. 10
I understand that failure to confirm the receipt of addenda may be cause for rejection of this bid. I further understand that any verbal representation made or assumed to be made during any oral discussion held between Vendor's representatives and any state personnel is not binding. Only the information issued in writing and added to the specifications by an official addendum is binding.
CRA Communications, LLC
Company
Sua Carrela
Authorized Signature
April 18, 2023
Date
NOTE: This addendum acknowledgement should be submitted with the bid to expedite

document processing.

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ADDENDUM



Charles Ryan Associates 601 Morris Street, Suite 301 Charleston, WV 25301 (304) 342-0161

April 18, 2023

To Whom It May Concern:

Thank you for the opportunity for Charles Ryan Associates (CRA) to share the reasons we believe we're the right communications partner for you.

CRA is a women-owned company, serving clients across the country for nearly 50 years. We are WBENC certified, Women-owned Federal Small Business certified, SWaM certified and GSA certified. We are the oldest and largest communications firm headquartered in West Virginia.

While CRA has had the privilege to grow our business nationally, working with some of the largest brands in the country in over 30 states, West Virginia has and always will be our home. Promoting the state of West Virginia is our passion and we work with organizations throughout the state to do this every day. As CRA's CEO, I serve as the chairwoman of the West Virginia Chamber of Commerce, a member of the West Virginia CEO Roundtable, and a member of the Board of Governors at West Virginia University. I dedicate my personal and professional time every day to support our state, as do many of our employees who serve on boards and work with clients to promote West Virginia and our communities.

As CRA has grown in prominence across the country, I have been asked many times if I would ever consider moving our headquarters - my answer is always the same, an emphatic NO. West Virginia is our home.

It would be our honor and privilege to work with the West Virginia Department of Commerce to help grow West Virginia and continue to be an integral part of promoting the state we love and call home.

Also, please note, we have several links to video and website examples in this proposal, so we are providing copies of this proposal on thumb drives in order for you to access these materials alongside the hard copies requested.

Sincerely,

Susan Lavenski, CEO

Charles Ryan Associates

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# **CRA RESPONSE TO RFP#** CRFP 0327 COM230000001



#### **SECTION 4.1 & 2 PROJECT SPECIFICATIONS**

CRA Communications, LLC, DBA Charles Rvan Associates, meets and agrees to all the criteria and mandatory requirements outlined in Section 4.1 & 2 Project Specifications of this RFP. All information to support this is outlined in Section 4.3 Specifications.

## 4.3. Qualifications and Experience Information

#### CRA's response to 4.3.1.1 A,B

CRA is in excellent financial health. We have the ability to pledge and place commitments of advertising media under this Contract, up to as much as \$1.5 million at any one time prior to reimbursement. CRA carries NO debt, and we have a ZERO balance on our line of credit. If desired, we can at any time provide the West Virginia Department of Commerce with our banking institutions' contact information at Huntington National Bank and Main Street Bank in Wheeling.

As requested, our gross annual billings for 2021 and 2022 are as follows:

**2021** \$6,380,496 **2022** \$6,671,322

Accounts gained in 2022 include:

- Buzz Food
- Capital Market Inc.
- Cornerstone Chemical Company
- **CSE** Corporate
- Dominion Energy Ohio
- Farmer Cline & Campbell
- Goodwin & Goodwin
- Kentucky Power
- LIFT-UP
- NTC
- Orange County, VA
- Ohio Valley Electric Corporation
- Retail Data
- Roane County EDA
- TCL Specialties LLC
- West Virginia Department of Economic Development
- Exxon Mobil
- Anthem
- **Dominion Energy**

Accounts lost in 2022 include:

- Michael Baker project ended
- ERC project ended
- Rural LISC project ended
- Strategies 360 project ended
- Stonerise Home Health project ended

Additionally, CRA has had many clients with budgets of \$1 million or more. Examples include:

- **Dominion Energy**
- Exxon
- Encova
- Anthem
- AEP/First Energy combined project

Over the years, CRA has worked with many vendor databases and has always mastered any database system deemed necessary. Examples we use include:

- Rackspace
- WPEngine
- Microsoft
- GoDaddy
- Google
- YouTube
- Vimeo
- MailGun
- MailChimp
- GitHub

For additional information about our experience with stacks, please see section 4.3.2.1.

## **WHO WE ARE**



Charles Ryan Associates (CRA) is smart brand communications.

With nearly 50 years of experience and a dedicated staff available 24/7, we have defined and refined our approach to effective communications. We bring together experts in strategy, creative. digital and media to develop comprehensive, results-driven solutions. This leads to delivering the right plans to meet the communications needs of our clients. And we know that when the right plan is combined with proven experience, it is more than just marketing, it is smart brand communications.

**SMART IS FOCUSED** — on your goals and on your communications strategies. We strive to become an extension of your team, immersing ourselves in your business. We research your audiences, study your competition and collaborate to bring new. smart perspectives to your brand.

**SMART IS PROVEN** — through experience, through expertise, and through a process that garners results. We analyze. We strategize. We create. We optimize. We are committed to developing the best strategies to get the right messages and content to the right audiences at the right times.

**SMART IS BOLD** — bold ideas, bold leadership and an inherent tenacity that drives everything we do. In short — we're driven to learn what will make your audiences care as much as you do. Then, we create innovative solutions that will move your brand forward.

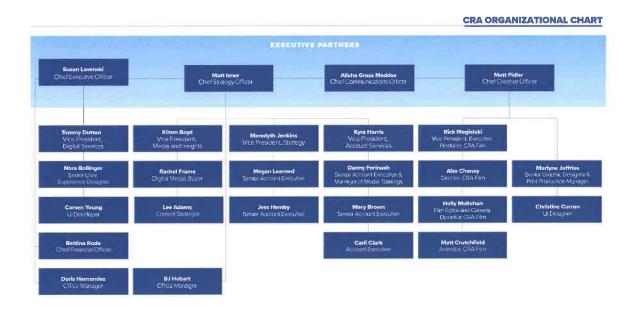
#### CRA IS...

- Strategy, Creative, Digital, Media, Film, Training and Research.
- · A women-owned, one-stop communications shop with nearly five decades of experience building, promoting and safeguarding brands.
- Innovative, driving smart brand communications solutions.
- Passionate about our work, our clients and our team. Our team becomes a seamless extension of your team.
- · A good steward, of your brand and your budget.

Founded in 1974, CRA has offices in Charleston, W.Va. and Richmond, Va. as well as team members working throughout the U.S. Additionally, CRA is certified by the Women's Business Enterprise Council (WBENC), the most relied-upon certification of womenowned businesses. We are a Small Business Administration-certified Women-Owned Small Business and hold a General Services Administration (GSA) contract.

CEO Susan Lavenski began her career at CRA in 1998. Partners Alisha Maddox, Matt Fidler and Matt Isner have been at CRA for 20 years plus. The executive management team bought the company in 2015 and have expanded CRA's footprint. We have become one of the nation's leading digital communications firms, working for some of the largest, most recognizable brands.

Finally, our experience has given us the rare ability to apply over five decades of traditional industry experience to the new world of communications - positioning our clients as a transparent, honest and reliable resource for the information the public seeks. Our expertise is in telling your story through compelling, thoughtful and consistent communication.



## CRA EMPLOYEES DEDICATED TO THE WV DEPARTMENT OF COMMERCE:



#### SUSAN LAVENSKI

Chief Executive Officer, Main Contact and CRA Team Lead

In addition to managing CRA's digital team, Susan is an expert in issues management and has spearheaded the communications efforts for transportation campaigns, utility, energy and manufacturing projects, controversial elections and health care certificates of need. In other words, she's the consummate problem solver. She has provided strategy for Fortune 500 businesses and worked with local, regional and national public figures, media representatives and business executives. Her work has produced results that garnered state, regional and national coverage for her clients.

She has a wide range of expertise from account management and strategy, brand strategy and management, communications plan development, community management, stakeholder engagement, media/spokesperson training, marketing strategy, message development, print, collateral and online production, program strategy and implementation, research, public relations and earned media relations.

Susan has worked at CRA for 21 years. She is a graduate of Marshall University, where she received a Bachelor of Arts degree in public relations journalism and a Master of Arts degree in political science with a concentration in public administration.

In addition to her duties as the CEO at CRA. Susan also serves as the CEO of the Onva Company, a real estate property company owned by her family. She also serves on several boards and committees and has received many recognitions.



MATT FIDLER

Chief Creative Officer

Matt oversees the creative and CRA Film teams at the firm. He leads these teams in developing unique solutions for all of our clients, and particularly, in the energy and manufacturing, transportation and insurance industries. His insight into branding complemented with brilliant creative strategy and his artistic talent ensures design and functionality work harmoniously to connect with our clients' target audiences and goals.

A graduate of West Virginia University, where he received a Bachelor of Fine Arts, Matt has worked at CRA for 20 years and has received numerous awards and accolades.

Matt has a wide range of expertise from advertising strategy, brand strategy and management, communications plan development, copywriting and content development, creative strategy and development, design and graphic design, marketing strategy, message development, print, collateral and online production, program strategy and implementation, public relations strategy and outreach, research and web development to web-based marketing.



#### ALISHA MADDOX

Chief Communications Officer

Alisha manages client services in Charleston, sales and marketing efforts as well as the communications and media training division. Alisha has worked at CRA for 19 years. She is a graduate of Marshall University, where she received a Bachelor of Arts degree in print journalism and a Master of Arts degree in public relations.

As a former news reporter, she has a passion for writing, and specializes in media relations, public education/involvement and integrated communications strategies for manufacturing. transportation, energy and small business clients, to name a few. She's represented clients on several statewide education initiatives. and served as the spokesperson on a statewide manufacturing campaign aimed at communicating with middle school students and others about various educational and career pathways available in the industry in West Virginia.

Alisha has a wide range of expertise from account management, advertising strategy, brand strategy and management, communications plan development, community management, copywriting and content development, creative strategy and development, earned media strategy and outreach, event planning and management, marketing strategy, message development, media training, program strategy and implementation, public relations strategy and outreach, public involvement and education strategies. social media strategy, development and implementation, stakeholder engagements, media/spokesperson training.

In addition to her duties as the CCO at CRA, Alisha is the co-founder of the West Virginia Visionary Group, a 501c3 nonprofit that offers an opportunity to build an emotional, spiritual and values-based foundation for students (www.wvforward.org). She also serves on several other state and business boards and committees and has received several recognitions.



#### DANNY FORINASH

Senior Account Executive, Manager of Media Trainings/Focus Groups

Before joining CRA in 2013, Danny worked in a variety of writing and communications positions, building the skill set that makes him invaluable to our company and clients. He was a writer and copy editor with the State Journal for six years, served as the communications manager for the Charleston Area Alliance economic and community development organization—and headed communications for the West Virginia State Tax Department.

Danny's background now serves him well in his role as senior account executive. His career path helped him learn a little about a lot of topics, as well as how to ask the right questions to get to the heart of a subject. He brings a sense of fun to his role as well, always ready with a quip or a comeback—but also has a deep sense of pride for CRA's well-respected reputation throughout the region.

Danny has a wide range of expertise from account management, advertising strategy, brand strategy and management, communications plan development, community management, copywriting and content development, creative strategy and development, earned media strategy and outreach, event planning and management, marketing strategy, message development, media training, program strategy and implementation, public relations strategy and outreach, public involvement and education strategies, social media strategy, development and implementation, stakeholder group strategy and management, tracking, analytics and measurement, web-based marketing to spokesperson training.



#### KIMM BOYD

Vice President, Media & Insights

Media maven Kimm's experience stretches coast to coast. A northern California native, Kimm has worked across the country doing everything from market research for national law firms to digital project management for a greeting card producer. Because of her varied background, Kimm is familiar with markets across the nation and has specialized in industries such as automotive, travel, entertainment, gaming, healthcare, pharmaceuticals, energy and utilities, nonprofits and advocacy.

With a flair for analytics and strategy, Kimm focuses on creating omni-channel strategies for our clients and ensures the campaigns are positioned to drive the highest engagement. She loves the thrill of negotiating and is a pro at ensuring budgets are aligned across media channels to provide maximum results. In an ever-changing media landscape, Kimm is always researching the latest programs, platforms and tools to take clients to the next level.

Kimm is a graduate of Arizona State University with a Bachelor of Arts degree in journalism and public relations. Kimm is also pursuing a Master of Arts degree from the University of Richmond in human resource management.

She has a wide range of expertise focused on media and digital strategy, planning and implementation, advertising strategy, audience profiling, content development, brand strategy and management. media buying and analysis, paid and earned media strategy and planning, digital marketing, SEO/SEM, social media monitoring, social media strategy, development and implementation, tracking, analytics and measurement and survey development.



#### TOMMY DUTTON

Vice President, Digital

Tommy speaks his own language around CRA, but thankfully he is able to translate the intricacies of web development into English for our team and our clients. He joined CRA in 2005 and has since grown our digital department into a powerhouse.

Between overseeing digital projects through all phases of development, performing triage on a pesky 404 and researching new technology solutions, Tommy is constantly juggling tasks to help our clients get ahead. And when Tommy isn't elbow-deep in code, he is working with clients or strategizing user experience (all with his signature dry sense of humor and a comeback always on the tip of his tongue). Tommy always knows the questions to ask that will make or break a project—but thankfully his greatest skill at CRA is fixing things.

Tommy is a West Virginia University graduate with a Bachelor of Science degree in business administration, as well as a Marshall University graduate with a Master of Science degree in information systems.

Tommy has a wide range of expertise from account management, brand strategy and management, print, collateral and online production, research, SEO/SEM, social media strategy, development and implementation, tracking, analytics and measurement, web design, web development, development and web-based marketing, database management, windows and web application development, SQL server, ASP.NET, web services, web API's, HTML5, JavaScript, CSS3 to Bootstrap.



## **CARSEN YOUNG**

UI Developer/WordPress Expert

With two Bachelors of Arts degrees from Lynchburg College in music and art, Carsen brings a unique sensibility to the digital development world. He first worked in marketing doing graphic design and then web design before moving primarily into development, and that familiarity with design ensures that the back end and front-end come together seamlessly in his projects.

As a UI Developer—one who builds out the front-end components of websites - Carsen is skilled at turning complex UI designs into fully functioning interfaces. He is an expert in the coding languages of HTML, CSS, SCSS, Javascript and PHP as well as in the WordPress CMS.

Carsen has an innate ability to adapt and thrive when life — or work —throws an unexpected curveball. He prides himself on being open to new experiences and approaching life with curiosity and a love of learning. This love shows up in his varied interests and hobbies — including improv comedy, keeping bees, making pizza from scratch, and working as a volunteer EMT, just to name a few.



#### RACHEL FRAME

Digital Media Buyer

Rachel is one of CRA's media gurus. Her primary responsibility as a digital media buyer is to buy media space, though she's constantly watching various media channels and assessing how ads are performing on different platforms and channels. She monitors, tracks and optimizes media ads and campaigns for our clients, making important decisions as to where to place specific ads and campaigns to ensure success.

Rachel is an alumna of Marshall University, where she earned a bachelor's degree focused in advertising as well as accolades from the West Virginia chapter of the American Advertising Federation she and her teammates won the Student Judges' Choice for Logo Design at the AAF awards. She loves being part of a team and brings an easy-going, can-do attitude to the CRA media team.

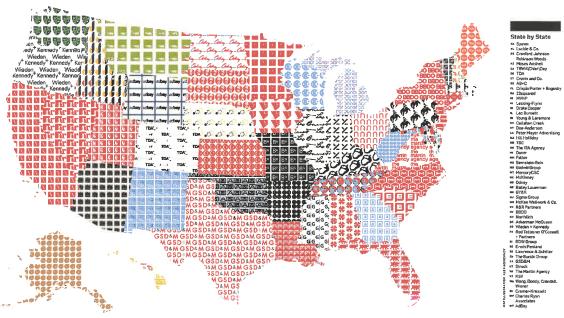
Prior to joining CRA, Rachel worked in the media industry as an advertising specialist and an account executive. Outside of work, Rachel likes to express her creative side through drawing, experimenting with makeup, and playing Dungeons & Dragons.

Other staff members will be available on an as needed basis. Our staffing levels change depending on the work we have in house, so we are always looking for great creative talent to add to our team.

#### **MEMBERSHIPS**

- Public Relations Society of America (State and National)
- American Federation of Advertising
- American Marketing Association
- Google Partner





AdWeek named Charles Ryan Associates in its United States of Ad Agencies Top Shops.

## REFERENCES

## **Greg Burton**

Former Executive Chair, Board of Directors Retired President & CEO Encova Mutual Insurance (304) 389-1110

Gburton717@aol.com

#### **Paul Shanks**

Manager, Digital Communications and Marketing **Dominion Energy** (804) 380-1430

Paul.R.Shanks@dominionenergy.com

## Ramya Bharathram

Managing Director & CFO Thirumalai Chemicals Limited +91 44 6605 7700 ramya.b@thirumalaichemicals.com

#### **Robbie Morris**

**Executive Director** Randolph County Development Authority (304) 614-3268 Robbie@randolphwv.org

#### Michael L. Queen

Deputy Chief of Staff & Director of Communications The Office of Mac Warner West Virginia Secretary of State (304) 368-6339 MQueen@wvsos.com

## Vic Sprouse

Project Manager, West Virginia **BHE** Renewables (304) 993-4937 Vic.sprouse@bherenewables.com

#### **SUBCONTRACTORS**

CRA is able to handle all of the needs of this RFP.

## MEDIA



CRA's response to 4.3.1.2.A,B,C

#### **MEDIA BUYING**

Our Media and Insights team handles all components of paid media (social, traditional, digital, native, streaming, radio, etc.) and provides reporting and analysis, and tracking.

Our team has extensive experience locally, regionally and nationally, working in over 30 states. We use a number of software platforms to research, place, monitor and optimize our buys, depending on the medium used and the location of the buy. Examples of software used for media buying and tracking include Strata, Advantage. Google Ads, direct placement on social media platforms, StackAdapt and TapClicks. We also have experience with many other software packages including Marketron, TradeDesk, WideOrbit and other DSP software.

We will help you in all stages of a campaign including:

- Pre-planning, strategy development, budget development. campaign optimization and monitoring and reporting
- Defining the correct media and digital strategy for project objectives and goals
- Providing valuable insights, metrics and reporting

Our in-house team provides the following services for Media Planning and Buying:

- Research understanding the target audience and how they use different mediums
- Planning analysis of the situation to determine the next steps, taking into consideration the market situation, competition, consumers, timing and budgets
- Selection determine which media vehicles to use based on media strategy
- Buying & Placement negotiate rates, placement, added value and provide detail to clients for approval
- Trafficking Creative creative specifications, A/B testing, headline optimization and rotation recommendations

- Pixel Implementation & Setup
- Monitoring & Optimization
- Reporting & Analysis

## WE CUSTOMIZE OUR PAID MEDIA CAMPAIGNS FOR ALL TYPES OF MEDIA INCLUDING BUT NOT LIMITED TO:

- Social Media Facebook, Twitter, Instagram, LinkedIn, Snapchat, etc.
- Digital local and national website placement; geo-fencing, interest, and behavioral targeting, retargeting, audience cultivation
- Search Engine Marketing (SEM) Google AdWords, Bing Search, Voice Search
- Television and Cable local, regional and national
- Print newspapers, trade journals and magazines
- Radio terrestrial and streaming audio (local radio, Pandora, Spotify, Podcasts, etc.)
- Out of Home digital billboards, permanent billboards, signage, highway sponsorships, gas pump advertisements
- Video native, YouTube, pre-roll
- Native Advertising video, textlinks, and advertorials
- OTT Advertising connected TV, streaming video

## CRA EMPLOYEES RESPONSIBLE FOR THE MEDIA NEEDS OF THE WEST VIRGINIA DEPARTMENT OF COMMERCE MEDIA (SEE BIOS ABOVE FOR EXPERIENCE)

- Kimm Boyd, Vice President of Media and Insights
- Danny Forinash, Senior Account Executive, Manager of Media Trainings/Focus Groups
- Rachel Frame, Digital Media Buyer

## SUCCESSFUL MEDIA BUY EXAMPLE ON THE FOLLOWING PAGE.

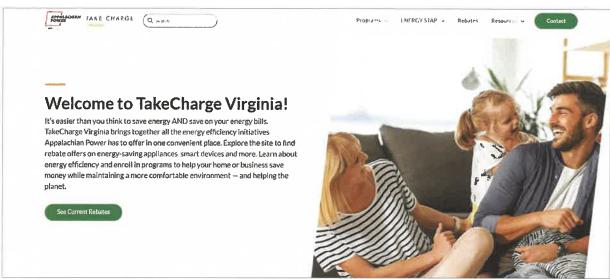


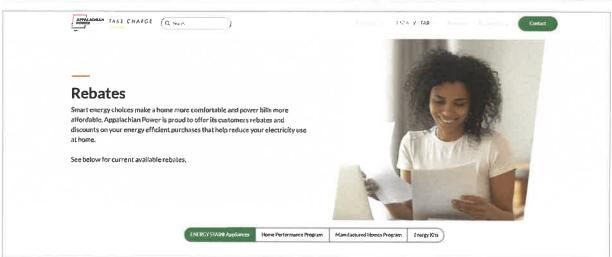
## TAKE CHARGE

## APPALACHIAN POWER'S TAKE CHARGE ENERGY EFFICIENCY CAMPAIGN

Appalachian Power (ApCo), a subsidiary of American Electric Power, is an electric utility aimed at initiatives that will provide safe, reliable power to its more than 1 million customers across Virginia, West Virginia, and Tennessee. There was a lack of understanding among customers about the importance of energy efficiency management - or controlling and reducing energy consumption - and the ways in which they could reduce energy usage while also save money. ApCo hired CRA nearly 7 years ago to create and manage a public outreach campaign around its energy efficiency programs that educated its customers about energy efficiency benefits and provided cost-saving tips and resources.

## Website





## The Results Are In...

#### Videos





Primarily, our advertising efforts are focused on driving traffic to the websites. For the West Virginia-customer website, TakeChargeWV.com, website visits, sessions per user and average session duration all increased in 2021 over 2020. We saw 1,056 conversion actions and 1,323 file downloads since launching the new site in late March 2021. West Virginia paid media campaigns drove large numbers of impressions and clicks with display being the highest – more than 6.4 million impressions were earned resulting in an overall 0.55% CTR, which is above industry benchmark.

The Virginia-customer website, TakeChargeVA.com, saw overall website visits decrease. However, session duration was up by 56.25% and pages per session rose by 24.40% over 2020 numbers. This tells us we are reaching more of the right people – those with an interest in the content available. Since launch, we saw 1,664 conversion actions and 626 file downloads. Virginia paid media campaigns were well above CTR benchmarks for display ads (more than 9.2 million impressions resulting in an overall CTR of 0.21%) and Facebook (more than 700,000 impressions resulting in a 1.71% CTR). Video campaigns drove more than 125,000 views with a 38.62% view rate.

In addition to CRA's work on the energy efficiency program websites and advertising campaign, we also worked with ApCo to promote two new programs in West Virginia. Both Switch & Save, promoting electric heat pumps, and Charge Forward, promoting electric vehicles, are just completing pilot years and we expect to be able to share results soon. These results were driven by our knowledge of the client, customer base, and programming, and our ability to finetune our approach for Appalachian Power year after year.

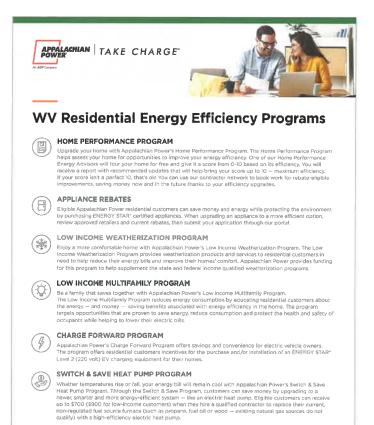


Postcard

#### How'd We Do It?

CRA branded the company's energy efficiency programs as TakeCharge West Virginia and TakeCharge Virginia, Each year, CRA works with the ApCo marketing team to create a yearly strategic communications plan based on program goals. We developed messaging, creative, web and digital assets for the program, as well as buy and place media that includes video, display ads, ad word search, and social media ads. We also manage the energy efficiency program websites for both states and create creative and collateral material, including website graphics, postcards, flyers, brochures, bill inserts, pull-up banners, digital display and social media ads, and video content to promote the program. Additionally, CRA works closely with program implementation vendors to coordinate efforts for overall program marketing and enrollment. In 2021, a major initiative was refreshing the websites. With a goal of providing an updated, better user experience, we updated site navigation, increased white space and standardized format across program pages.

## One-Sheet



TakeChargeWV.com

## RESEARCH



## CRA's response to 4.3.1.3.A,B

#### RESEARCH

The insight we can gain from research is critical in determining effective solutions. We can learn answers to questions like what do your audiences think about current and future projects, programs and campaigns; what do they know about West Virginia; what's the public perception of our state; what challenges or aggravations do people share; how vocal are they on social media; do they understand the benefits of locating a business in our state; what's it like to live here; what messages resonate best with your target audiences?

To gain these insights, our team conducts focus groups, online surveys and IDI's with current and potential targets to guide the development of a comprehensive communications plan. These tools help us not only develop comprehensive plans but provide measurement outcomes regarding the effectiveness and impact of our internal and external communications strategies.

Our team has focus group moderators on staff, and writers who understand how to develop discussion guides, online surveys and IDI questionnaires. Once the research has been conducted, we have analytics professionals who dig into the data and help develop the best overall communications messages and tools to reach specific audiences with the best price point.

And our team already has an advantage as we are intimately familiar with many of the communications challenges unique to West Virginia. We have spent countless hours analyzing and digesting local, regional and national research and understand the unique cultural nuance of local communities, national companies, and how to bridge the gap to bring success to our state.

Changing cultures, behaviors and opinions on issues ranging from economic development to transportation, education, mental health to energy use is what we do on a daily basis. As a result, we have become experts in audience segmentation. We know how to dive below the surface to gain an understanding of the behavioral motivations of each target segment. Finally, we know how to create strategies and tactics that speak to those motivations and create behavioral and cultural change.

As your partner, our experience will help ensure that you are able to develop and optimize creative materials, campaign messages. sponsorships, public events and digital/social/traditional media buys to maximize return on every dollar spent.

#### RESEARCH EXAMPLE

While CRA cannot name the specific client due to confidentiality and non-disclosure agreements (which we have with the majority of our clients) we do have permission to provide you with the methodology and results of a research project we completed for a West Virginia client in 2022. If desired, we can discuss the specific client in person.

#### FOCUS GROUP CASE STUDY

Research is critical for understanding an audience – in this case. potential audiences and clients for a company in the service industry.

To improve outreach and better understand how to communicate with the public, this West Virginia client engaged CRA to conduct focus groups in four West Virginia areas – Beckley, Charleston, Morgantown and Martinsburg.

Eight focus group sessions were conducted in May, June and October 2022

The data and results helped our client to craft marketing campaigns, adjust community outreach efforts and optimize creative assets.

#### METHODOLOGY

CRA scheduled two focus group sessions at its offices in Charleston. two sessions at Country Inn & Suites in Beckley and two sessions at Waterfront Place Hotel in Morgantown. The sessions were hosted in May and June of 2022 and were a mix of evening and afternoon time frames.

The Martinsburg sessions followed in October 2022 at Comfort Inn Aikens Center



Each session ran about 90 minutes.

Our client worked with CRA to identify relevant geographic variables, and CRA worked to attain gender, socio-economic and education level diversity.

With those factors in mind, CRA designed social media ads with which to promote focus groups on Facebook, offering a \$100 gift card in exchange for 90 minutes of time. The posts did not identify the client.

CRA's media department used paid advertising on Facebook to target populations within those markets. Those interested completed a form on Facebook, and completed forms were compiled in a spreadsheet.

CRA then reached out to participants with specific times and locations.

CRA and our client worked together to craft questionnaires and a discussion guide. The questionnaires provided baseline opinion information for each of the groups. The discussion guide provided a common session structure for consistency, allowing each session to follow the same agenda.

Topics included general concepts about the client's service industry, marketing and media outreach. Each session was recorded directly to a cloud environment via an Owl virtual conferencing device. A second camera was placed in another location to act as backup for both video and audio.

Each group was placed at a table, allowing participants an easy view of the moderator and television screen.

CRA provided beverages and food to each group.

Sessions began with asking participants to sign a waiver, which asked them to not discuss the sessions with others and explained the sessions were recorded. Participants then completed a general questionnaire.

During the second half of each session, participants viewed video, website and messaging examples. They assessed those via rating scales on a second questionnaire. They used a scale of 1 to 5, with 5 being "love it."

The group then discussed each example in more detail. In all, 77 people participated in the eight focus groups.

Once the focus groups were completed, CRA's data analysts compiled the information into an easily understandable report to allow the client to see which messages worked best in each region of the state. The report also detailed preferred advertising vehicles, name recognition information and overall industry messaging. CRA then worked with this client to do a brand overhaul that included a new logo, new messaging, updated television spots and billboards. CRA also developed an entire social media campaign for the client to include videos, content calendars and posting procedures.



# **WEBSITES &** DIGITAL SERVICES



CRA's response to 4.3.1.4.A,B

#### **WEBSITES - A DIGITAL WORLD**

Ever-changing technology has utterly transformed the world of communications and advertising, and more than ever, powerful communication skills are needed to rise above the crowd. CRA excels in taking our decades of history and experience in the shifting advertising landscape and applying it to the latest digital trends, including how websites fit into the overall marketing puzzle of digital and social.

Your online home - A compelling website needs to be attractive to the viewer, well organized and populated with the right kind of information. Website content needs to be approached differently than print content or ad content, but luckily our team knows how to structure and write for clear, concise yet informative websites. From simple design updates to major programming to new sites created from nothing, we can make your website shine.

Getting search results - If you aren't using search engine optimization and search engine marketing (SEO and SEM) these days, you won't be there when your audience is looking for you, ready to engage. We ensure that SEO and SEM are considered for every website and online campaign, so that the right people are able to find you as quickly and easily as possible. And our content team will work with your internal team to make sure the website has the latest information, and the content is fresh and easily navigable.

Software Engineer and Vice President of Digital Services Tommy Dutton heads a team of engineers, front-end designers, front-end developers and content strategists to provide website development, design, maintenance and updates to our clients. Our team has developed desktop and mobile websites ranging in price from \$10,000 to \$250,000. We have developed our own custom CMS or our team can utilize whatever software platform, including WordPress, with which you are most comfortable.

## COMMERCIAL WEBSITE EXAMPLES

APCO Take Charge Energy Efficiency for WV and VA (takechargewv.com, takechargeva.com)

This site is running on a multi-site instance of our CRACMS developed using the WISA stack. It features Google 2-factor authentication for sign in, interactive energy guizzes, database driven contractors lists and the ability to share content between sites. It is hosted in Microsoft Azure and driven by Azure SQL server and Azure app services.

## Partner With Anthem Large Group Acquisition

(partnerwithanthem.com/abssample.aspx)

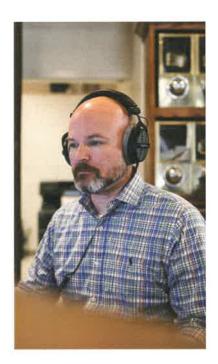
This site is running on our CRACMS developed using the WISA stack. The big feature on this site is targeted marketing. First, company data is loaded into the site's database through the administrative portion of the site. Unique URLs are then generated for each company and shared through email and direct mail campaigns. Users are then directed to these URLS where they are presented with a customized experience based upon their company data and geographic region. This customization is achieved through database relationships between the company and templated campaign content using text replacements in server-side code. Media files for the site are stored in Azure blob storage and accessed through Microsoft CDN to ensure fast load times for users across the nation. It is hosted in Microsoft Azure and driven by Azure SQL server and Azure app services.

## Smith Land Surveying E-commerce

(slswv.com)

This site is running on our CRACMS developed using the WISA stack. It features a custom-built shopping cart that enables users to provide location information in order to purchase flood reports. Payments are accepted on the site using PayPal Checkout, which enables users to make payment using a credit card or PayPal. Transactions are logged to the site database for download and reconciliation through site admin. Users are able to login to the site and view previous purchases. It is hosted in Microsoft Azure and driven by Azure SQL server and Azure app services.

We also have two projects currently in our cue that are requiring e-commerce through a product called WooCommerce that integrates with WordPress and is supported by WP engine.



Additionally, we have experience with different payment providers including Stripe and Authorize.net.

## CRA's response to 4.3.1.5.A,B

At CRA, our digital and media services are combined under one department – Media and Insights. This team works hand in hand with our website/digital team to ensure complete streamlining and seamless process.

#### **OUR DIGITAL SERVICES INCLUDE THE FOLLOWING:**

## Search Engine Optimization (SEO) Audit

Examination of current search effectiveness and competitor comparisons, and the assessment of technical and content shortcomings across platforms, including mobile and tablet.

Evaluation of potential keywords/phrases for relevancy, competitive landscape, search and social volume and terms to be included in the content.

## Web Analytics

Comprehensive review of website data to determine behavior patterns to allow us to make improvements and/or enhancements to content and the site overall.

#### Website Tracking & Reporting

Install and manage comprehensive tracking to ensure key performance metrics are identified, analyzed and reportable. Tracking determines critical information such as user interactions and content engagement, traffic sources, and action activities such as sign-ups, form fills and video views on websites and landing pages.

#### Google Analytics

Digital reporting shows campaign performance through key performance indicators such as page views, traffic sources, etc. We are a Google Partner, and our media experts are certified in Google Analytics. The team can assist in establishing accounts, managing accounts and producing reports to clients.

#### Content Marketing Plan

Content marketing plans are focused on the analysis of current and competitor positioning, keywords and personas. These plans include editorial calendars for blogs, web sites and social platforms.

#### Content Execution

The development and distribution of compelling stories and insights that keep brands top-of-mind, build trust for audiences, and position companies as thought leaders is our goal.

## Marketing Automation

The utilization of software platforms and technologies such as HubSpot and Mailchimp to market more effectively and efficiently on multiple channels (such as email, social, websites, etc.) and automate repetitive tasks.

#### Social Metrics & Dashboards INSIGHTS

Establishing relevant, meaningful KPIs (key performance indicators) and metrics for social media strategies and campaigns (organic and paid).

## Social Campaigns & Promotions

Creation and execution of social media promotions like contests and timely programs that drive subscription and participation.

## Social Media Audit & Blueprint

Evaluation of current social platforms and analysis of competitors and category best practices.

## Social Media Strategy

Comprehensive analysis and recommendations for a social media program, including ties to business outcomes, resourcing, outpost planning, metrics and tactical ideas.

#### **Email Delivery & Optimization**

Analysis and optimization of email campaigns.

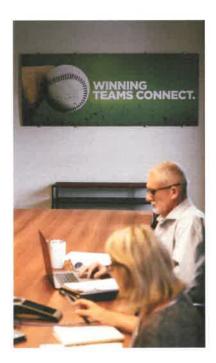
#### Research

Provides research for needs such as market, audience, competitor, opposition and profiling.

## Website Development, Design, Maintenance and Updates

Offers software engineers, front-end developers and designers with experience in designing and developing desktop and mobile websites.

Our content team will work with your internal team to make sure the website has the latest information, and the content is fresh and easily navigable.



#### Ad Search & Social Advertising

Creation and management of ongoing advertising on Google, Bing, Facebook, LinkedIn, YouTube and others.

## ORGANIC SOCIAL MEDIA AND CONTENT DEVELOPMENT

Having a seamless organic and paid social presence is essential to reaching potential companies, families, CEOs, scout teams, community members, media, elected officials and other members of the public. Most people we need to reach will have a social profile and implementing social media into a communications plan is a "must" today to provide pertinent information and facts about West Virginia.

Video content is king on social media, so videos will be a huge part of the messaging. We will develop strategies for all communications platforms including Facebook, Twitter and any other social platforms that are deemed necessary. It also will be important to implement a social media posting protocol with approved messaging to handle positive, negative and neutral posts as well as trolls. Protocols will help us to determine the tone and risk level for each post, as well as considerations of transparency, sourcing, timing, influence, control and response variations.

At CRA, our media and digital teams work very closely with our advertising/creative team to ensure all facets of a campaign are working in tandem. We always take a team approach to our campaigns so that the creative aspects are working best within the platforms we recommend.

## ADVERTISING, BRANDING AND **CREATIVE SERVICES AT CRA**

Creative is usually the first thing someone notices - the look, the craft, the design - but it can't just look nice. It needs to inspire, spur action, educate, persuade and more. Our creative team handles everything from a digital campaign to a glossy booklet dozens of pages thick, deftly switching medium or style to fit our clients' needs. We have creative directors and graphic designers on our team who specialize in economic development messaging and developing creative components designed to educate audiences, create a personal connection and inspire action.

#### **VIDEO ASSETS**

Our in-house film division specializes in television spots, web videos. long-format projects, animation, time-lapse video and much more.

We work with clients and budgets of all sizes, creating innovative and unique visuals that grab attention, engage and affect emotion.

In today's digital age, there is no method of storytelling more engaging than video. Video makes up 80 percent of all online content, but it can be hard to make your story unique and stand out against the background noise.

New technology has made it more affordable to produce a video. But video production is only a small part of the equation. The challenge is knowing what to say and how to say it. This is what separates a successful video from the clutter.

Our film division is focused on creating captivating and memorable videos – sharing compelling and educational stories that matter most to you and your audience. Great stories happen to those who can tell them. We study your messages, your audience and your goals. We strategize, plan and execute. And together, we tell your great stories.

It begins with strategy. Our process begins with one or more creative strategy sessions. We ask: Why are we doing this? What is the story we want to tell? Who is the audience?

We then go to the concepting phase. During this phase of our process, we determine how to tell your story. We consider current research and trends, style, tone and emotion that together we want to convey. Often, the team will develop multiple concepts for review.

Once a concept is determined, the story enters pre-production – the most important step in our process. We plan for filming, schedule locations, create scripts and shot lists, and secure talent, equipment and crew.

Now it's time for the actual production. During production, we collect all the elements necessary to bring your story to life. We shoot scenes, interviews and B-roll, or footage, to fulfill your vision. It's important to follow the plan but remain flexible throughout production. We always film more than we'll need to ensure the right mix of visual interest and informational content to best tell your story.



The next step is post-production. It all comes together during this phase. We take everything – the story, footage, audio, graphics, effects and more – to assemble the most engaging piece.

Once the edits are complete, we deliver the finished piece - your story – in its final format for distribution.

Our film team has worked with clients on projects all over the country. With decades of experience, this team knows exactly how to tell your story well.

Additionally, we are continually updating our equipment and software to make sure our staff has the best resources possible. We utilize the latest technologies when it comes to computers, software and video equipment. We update every computer after three years, purchase up-to-date Adobe Creative Cloud, and continually upgrade our equipment so we have the latest generation of Sony DSLR cameras and audio recorders.

As requested, you will see the digital marketing campaign example below, but we also want to provide you with a few other samples of our work.

Check out this link to view a video we completed for the West Virginia Secretary of State's office.

(vimeo.com/812448735/7cf70d5b96)

Check out this link to view a video we completed for the West Virginia Department of Economic Development.

(vimeo.com/812404767/9cc549d3cd)

Check out this link to view a video for the Randolph County Development Authority. THIS IS IN DRAFT FORM, with a few minor changes currently in the editing phase.

(vimeo.com/812421006/b9bd9d8f1d)

Check out this link to view of a video we completed for Charleston Restaurant Week.

(vimeo.com/812446052/dbe1b901be)

In addition to these projects, CRA is currently working with Nashville songwriter and West Virginia native Kevin Major. Mr. Major recently wrote a song called "West BY GOD Virginia", found at this link www.youtube.com/watch?v=I181Digm5kY. CRA's Susan Lavenski and Kevin Major are in discussions about how to use this song to promote the wonderful benefits of living and working in West Virginia. This is a private sector endeavor led by CRA where we want to promote economic development, business, higher education and standard of living in our great state through video assets, social and digital media, all while utilizing the lyrics and song written by Mr. Major. CRA has already invested a significant amount of our own resources and dollars to film throughout the state. We also anticipate reaching out to those in the business community, industry. government and higher education to participate in this campaign. Why would we do this? It is our way to help give back to the state that has given us so much professionally and personally. And we would love for the West Virginia Department of Commerce to be a part of this process.

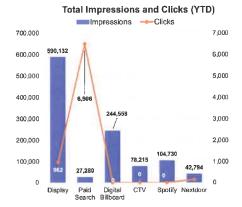
#### DIGITAL MARKETING CAMPAIGN EXAMPLE

U

While CRA cannot name the specific client due to confidentiality agreements and non-disclosure agreements (which we have with the majority of our clients) we do have permission to provide you with the results of a digital campaign we performed for an industry client in Virginia which focused on safety campaigns. Two campaign messages were delivered through digital marketing campaigns with a budget of \$90,000. If desired, we can discuss the specific client in person.

#### **Campaign Highlights**

- The paid search campaign has generated 27,280 impressions and 6,506 link clicks on ads since launching on 4/6/2022. Females 35-44 are producing the
- The digital billboard campaign has generated 244,558 impressions over the course of the campaigns from April through May 2022 and August through September 2022.
- The digital Display campaign earned 962 clicks on ads, with a CTR of 0.16% which is 6.67% higher than benchmark.\*
- The CTV campaign earned 78,215 impressions and 76,217 views to completion for a 97.45% completion rate during the campaign.
- The Spotify campaign generated 104,730 impressions over the course of the campaign from April through May 2022 and August through September 2022.
- The Nextdoor campaign generated 42,795 impressions over the course of the campaign from April through May 2022 and August through September



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Reported metrics 04/01/2022 - 10/31/2022

\*CTR Benchmark for Digital Displey Ads: 0.15%

#### **Google AdWords Overview**

The paid search campaign has earned 6,506 clicks and a 23.85% CTR\* since launch, which is 652% higher than benchmark.

AdWords YTD Metrics Reporting Date Range: 4/1/2022–10/31/2022	YTD Total Campaign Metrics	
Impressions	27,280	
Clicks	6,506	
CTR	23.85%	

Top Keywords (by clicks)	Top Keywords (by CTR)	Top Demographics	Top Locations (by Zip Code)
Natural gas line	Underground utility lines		• 23834
Gas line location	Utility markings on lawn	Overall: Adults 25-54	• 24401
Utility finder	<ul> <li>Who do you call before you dig</li> </ul>	<ul> <li>% Male to Female 40:60</li> </ul>	• 22980
	Utility line locator		• 22554
	·	Most Clicks: Females 35-44	• 23831
			charles ryan associates
ed metrics 04/01/2022 - 10/31/2022			4

#### **Digital Display and Digital Billboard Overview**

Display campaigns produced CTRs well above the 0.15% CTR benchmark.

The digital display campaigns launched on 8/8/2022 and ran until 9/30/2022. The 728x90 Mailbox Display Ad was the top producer of ad clicks (198,742), while the 300x250 Fences ad earned the highest CTR (0.23%).

#### **Digital Display Campaign** Total Results (YTD)

- · 590,132 Impressions Delivered
- · 962 Clicks on Ads
- 0.16% CTR\*

The Digital Billboard campaign generated 244,558 impressions over the course of the campaign.

The digital billboard campaign launched on 8/8/2022 and ran until 9/30/2022.

#### Digital Billboard Campaign Total Results (YTD)

· 244,558 Impressions Delivered

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Reported metrics 04/01/2022 - 10/31/2022

\*CTR Benchmark for Digital Display Ads: 0.15%

#### CTV and Spotify/Audio Overview

#### The CTV campaign has earned a 97.45% overall completion rate.\*

The CTV campaigns launched on 8/8/2022 and will run until 9/30/2022. CTV is short form, skippable online advertising targeted to relevant content channels and/or audience groups. Connected TV (CTV) refers to any TV that can be connected to the internet and access content beyond what is available via the normal offering from a cable provider. 58,660 impressions were earned from the English spot, while 19,555 impressions were produced by the Spanish spot. The Spanish spot earned the highest completion rate of the two ads in rotation (99.14%).

#### CTV Campaign **Total Results**

- 78.215 Impressions Delivered
- \* 76,217 Views to Completion
- 97.45% Completion Rate\*

The Spotify/Audio campaign has earned a 97.93% overall completion rate.\*\*

The Spotify campaigns launched on 8/8/2022 and will run until 9/30/2022. 86,057 impressions were earned by the English audio spot, while 18,673 impressions were produced by the Spanish audio spot. The Spanish spot has earned the highest completion rate of the two ads in rotation (98.38%).

#### Spotify/Audio Campaign **Total Results**

- · 104.730 Impressions Delivered
- · 102,567 Listens to Completion
- 97.93% Completion Rate\*\*

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Reported metrics 04/01/2022 - 10/31/2022

\*VCR Benchmark for CTV Ads: 96% \*\*CTR Benchmark for Spotify Ads: 0.10%-0.15%

#### **Nextdoor Overview**

Nextdoor campaigns produced CTRs well above the 0.15% CTR\* benchmark.

The Nextdoor campaigns launched on 8/8/2022 and ran until 9/30/2022. The campaign performed very well and was 140% over the benchmark.

#### **Nextdoor Campaign** Total Results (YTD)

- · 42,795 Impressions Delivered
- · 153 Clicks on Ads
- 0.36% CTR\*

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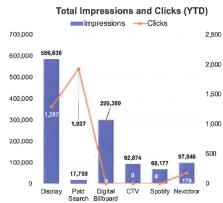
Reported metrics 04/01/2022 - 10/31/2022 \*CTR Benchmark for Nextdoor Ads: .15%

#### 2022 Smell Safety Campaigns Report

Reporting Dates: April 1, 2022 - October 31, 2022

#### **Campaign Highlights**

- The paid search campaign has generated 17,759 impressions and 1,927 link clicks on ads since launching on 4/1/2022. Females 35-44 are producing the most clicks,
- The digital billboard campaign has generated 299,369 impressions over the course of the campaigns from April through May 2022 and September through October 2022.
- The digital Display campaign earned 1,287 clicks on ads, with a CTR of 0.22% which is 47% higher than benchmark.\*
- The CTV campaign earned 92,874 impressions and 91,453 views to completion for a 98.47% completion rate during the campaign.
- The Spotify campaign generated 68,177 impressions over the course of the campaign from April through May 2022 and September through October 2022.
- The Nextdoor campaign generated 97,846 impressions over the course of the campaign from April through May 2022 and September through October



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Reported metrics 04/01/2022 - 10/31/2022 \*CTR Benchmark for Digital Display Ads: 0.15%



CRA's response to 4.3.1.6.

#### **ENCOVA MUTUAL INSURANCE**

#### RESEARCH, BRAND DEVELOPMENT. LAUNCH & ANALYSIS

#### SITUATION ANALYSIS AND OPPORTUNITIES

Digital Evite

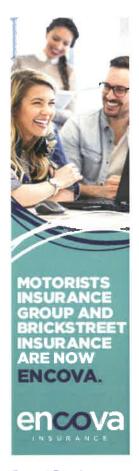


West Virginia-based BrickStreet Mutual Insurance Co. Inc. and Ohiobased Motorists Mutual Insurance Co. Inc. formed an affiliation in 2017 through a joint venture. BrickStreet was a monoline workers' compensation insurer and Motorists Insurance was a business. property/casualty, auto and life insurer. This affiliation would create a new regional carrier ranked in the top 20 mutual companies in the United States and, once completed, would include more than 1,600 employees in 10 regional offices writing policies in 29 states and the District of Columbia.

CRA has been the agency of record for BrickStreet since 2006 and assumed the role as the agency of record for Motorists when the merger took place. From the affiliation approval in 2017, the goal was to merge the companies under one name and one brand. However, many legal, financial, technological and organizational issues stood in the way of allowing this to occur immediately. Redomestications, licensing agencies for each state, rollout of new products, etc. - all contributed to the idea to co-brand or to utilize both existing brands concurrently for a limited amount of time after the affiliation and prior to a new brand launch.



Brand Television



Digital Display

The companies were slowly moving forward together, but there were challenges. In addition, the idea of co-branding was not well received from various groups and shareholders citing how this could be both confusing and a "clunky" choice for branding the companies. As such, the internal communications team and CRA worked together on the new branding campaign. Many meetings were hosted by executive management to discuss financials, operations and technology challenges. Discussions about timelines, budget and other financial issues were always a priority. Though the brand launch was initially slated for 2020, after months of debate among company management, shareholders, employees, agents, policyholders and others, the timeline for the brand launch was moved to 2019.

#### RESEARCH

The research process began with identifying the characteristics of the ideal customer for the brand's products and services, including competitor comparison. Then, we worked to define the emotional attachment customers would form with the name.

From here, our creative team developed more than 100 name suggestions for the new brand that were discussed, researched and debated, before narrowing it down to roughly 20 names within a couple of months. These names were then presented to the client's executive management team, which assisted in narrowing the list down even further.

With a handful of viable naming options, CRA began the extensive trademark exploration process, both nationally and internationally, as well as the translation process in the 15 most popular languages around the globe to ensure the potential brand names did not have unintentional translations or colloquial meanings in other languages and/or in other countries. We worked closely with a law firm to research the United States Department of Commerce's Patent and Trademark Office to further explore existing patents and their parent organizations.

In addition, we planned several focus groups outside both companies' regional footprint that consisted of business owners and agents. Online surveys and in-depth interviews of executives and board members were conducted as well to help garner additional thoughts, opinions and perceptions about the potential brand names.



Radio Spots

The results from the research proved that the joining of BrickStreet Insurance and Motorists Insurance needed to result in a unified. new brand – one that would garner credibility in the minds of its employees, as well as its customers (current and potential), agent partners and the public. Thus, Encova Mutual Insurance was born.

Encova is a "coined" word, meaning it has no official dictionary definition. It is a combination of words important in the insurance industry. The "e-n" is reminiscent of words of security like envelope, encircle and encompass. The "c-o" and "c-o-v" inspire thoughts of cooperation and coverage and the "a" represents the commitment to the independent agent distribution channel.

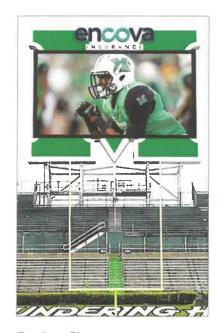
#### STRATEGY PLANNING AND BRAND DEVELOPMENT

Brand development started with strategic planning, which can be divided into three phases: pre-launch, launch and post-launch.

Prior to the brand launch, or pre-launch phase, CRA prepared all necessary materials, messaging and resources. This included creating messages and materials for employees and, later, for them to use in their communications to others. We also planned several events that would take place to launch the brand to various audiences.

Next, the new brand was launched publicly. It was critical we were transparent in our communications efforts for the brand launch with all audiences. We shared not only the branding elements but the story behind the creation of the Encova Insurance brand in order to arm employees, agent partners and others with information that would allow them to become champions of the brand to the public a strategy needed to ensure loyalty and longevity of the brand.

During the *post-launch* is when the brand begins to build awareness and garner interest while forming its own identity and disassociating from the two former brands. Reinforcement of the Encova brand through paid and earned media, collaterals and all other materials will create lasting impressions with audiences. It is critical the company continue this process for an extended amount of time (we recommend 18-36 months) to ensure the new brand takes hold in the minds and hearts of employees, agents, policyholders and all other audiences.



Stadium Signage

Key elements for each phase of the planning are as follows:

#### Phase one: Pre-launch

Building and preparation

- Name and logo development
- Brand identity development (tag, colors, fonts, photography, voice, tone, etc.)
- Identification of all audiences
- Identification of all brand qualities
- Creation of the brand story
- Confirmation that the corporate mission and vision aligned with qualities and story; confirmation that the qualities and story aligned with the mission and vision
- Audit of all existing communications materials to include the creation of a master list of materials that needed rebranded including but not limited to collaterals, signage, website, corporate identity materials, etc.
- Development of communications materials to announce the new brand to the public as well as the creation of a comprehensive checklist. Messaging and creative materials included but were not limited to press release, frequently asked questions (FAQ), email templates, videos, paid media and earned media strategy and implementation plans, etc.
- Creation of a brand launch timeline used for planning, implementation and tracking
- Research for naming options including trademarks
- Purchase and reservation of logos (for various uses), web domains and social media accounts
- Event planning including those focused around the launch as well as media tours, executive tours and agency events at regional offices across the country
- Development of a contingency plan(s) in the event of an unplanned early brand release
- Creation of a post-launch paid media campaign
- Messaging and creative development for an eblast "teaser" and brand launch campaign to associates

#### Print Flyer





Coffee Mug

()



Unveiling of new brand

Development of external communications included:

- Press release
- Messaging and eblast campaign with agents and policyholders
- Paid media, traditional and nontraditional plans and campaigns
- Social media campaign
- Collateral materials including check/bill stuffers, etc.
- New website
- Event planning around the launch

Development of internal communications included:

- Creation of multiple eblast email communications brand story, share paid ad campaign, FAQ, brand guide, etc.
- Launch "party" in all offices events with food, new logo giveaways
- Executive tour

#### Phase three: Post-launch

Continuous reinforcement across all audiences immediately following launch for a minimum of 12-18 months, (18-36 months is recommended.)

- Development of a paid media campaign: strategic implementation targeting key areas of the company's footprint
- Sponsorships: continuation of current sponsorships (previous commitments from both companies) but using an increased budget as well as researching additional opportunities to reach various audiences
- Giveaways: research and purchase of new branded giveaways and attire for employees, partners and agents at sponsored and other public events
- Continuation of eblast campaigns to various audiences about the brand
- Messaging and creative material development for internal and external communications with various audiences when key milestones/goals had been reached



#### BRAND LAUNCH OBJECTIVES

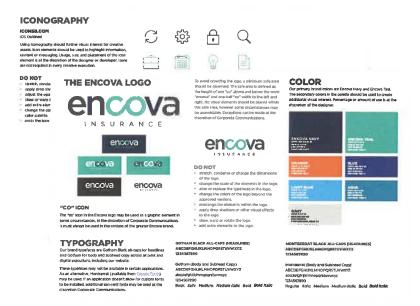
The objectives of the brand launch were two-fold – to inform all agencies and agency staff, policyholders, employees, vendors, claimants and the public about the new brand as well as create curiosity and enthusiasm, while assuring strength and stability for years to come. Several communications projects and campaigns using a variety of tactics were created for various audiences to:

- Ensure policyholders of continued excellent service and improved financial stability.
- Share materials with agencies and their teams so they can share news with their clients.
- Quell fears of business leaders that neither company was disappearing, only moving forward together.
- Share internal changes and updates due to name change/brand launch with associates.
- Inform communities of continued support and dedication to nonprofit organizations, schools and more - regardless of the name of the company.

#### Website







#### CREATIVE DEVELOPMENT AND EXECUTION

Creative services around the new brand began once the name had been determined and strategic planning was underway. The creative development of a logo, brand color palette and font families took place followed by the creation of other brand elements. This was no easy task as it took dozens of versions of these items and numerous rounds of adaptations that could complement the new brand, it was during the creative development that the main design element which centered around sgraffito circles – was determined. (Sgraffito is a painting and pottery technique and means "scratched" in Italian.)

Following this, a brand guide was created that became the rulebook for the development of all collateral, ads, videos, social media elements and much more. This included colors, elements, logo spacing requirements, formatting, etc. The brand guide was to be used by all vendors and subcontractors who would use the Encova logo and/or brand in any and all marketing pieces moving forward.

Next, CRA's creative team created a multitude of pieces that would be needed for phase one and phase two: leading up to launch, for launch day and immediately following. A list of tactics used through several of the campaigns that needed various levels of design are listed below. (Following this set, phase three, or post-launch, began: new advertising creative and ongoing items after the launch such as collaterals, displays and so on.)





#### **Building Signage**



#### Agencies and their teams

- Eblast campaign for launch and following
- Digital campaign
- Combined agent newsletter
- Collaterals
- Giveaways

#### Public

- Paid media
- Earned media
- Sports sponsorships
- Collaterals

#### **Employees**

- Presentations
- Emails
- **FAQs**
- Intranet updates
- Launch parties
- Giveaways

#### Policyholders

- Eblasts
- Post cards
- Invoice stuffers
- Talking points

#### Vendors

- · Post cards
- Invoice/check stuffers

#### Claimants

- · Post cards
- Check stuffers
- Talking points and email footers

In addition to these, in an effort to build a unique and withstanding brand that was able to quickly form a deep-rooted emotional connection with all audiences, CRA's internal film team, CRA Film, created several videos that explained the transition. The first was a history video, outlining the history of each company, describing the affiliation and explaining the new brand moving the two companies forward together. CRA Film also developed :15, :30 and :60 television and social media videos that depicted "customers" needing all lines of insurance.

#### Branded Apparel



#### MESSAGING

Developed concurrently with the designs of the communications pieces, messaging was even more critical to effectively tell the story of the new brand and explain the change. Messaging for advertising and communications surrounding the brand launch was to familiarize audiences with the new company name and to ensure they can associate it with the old companies. The goal of the next advertising campaign, which began six months post-launch, was to direct the public away from the former company names and begin focusing on the new brand and the company's key market differentiators, or areas where competitors seem to fall short. Phase three, which is slated to begin in mid-2020, will focus on specific lines of insurance.

Sample Messaging for Brand Launch:

- Together, Motorists Insurance Group and BrickStreet Insurance are building a stronger future.
- Motorists and BrickStreet are now Encova Insurance.
- With combined insights from decades of industry experience and expanded product offerings, Motorists and BrickStreet have come together to push innovation forward for agents and policyholders.

Sample Messaging for Brand Awareness and Market Differentiators:

- Our superior financial strength enables us to invest in innovative technology, products and claims service, while ensuring you are protected when you need it most.
- Our state-of-the-art technology demonstrates our commitment to be a high-tech, high-touch company.
- Our comprehensive one-stop shop offers you a tailored solution and experience for your unique insurance needs.
- Encova 360°, our approach to workers' compensation, surrounds your business with a team that's committed to protecting your most valuable assets.
- We believe local needs are best served by your neighbors. Rely on your local independent Encova insurance agent to be with you at every step in life's journey.

#### CAMPAIGN TIMELINE

2017-2018: Formal and informal research on new company names

Early 2019: Decision to launch in 2019 instead of 2020

Late March 2019: Final name and logo selected

April 1 – July 11, 2019: Planning, development and production of communications deliverables, including but not limited to a media plan and needed creative assets, materials for all tactics listed above and an events schedule and preparation

July 12, 2019: New brand launch

July 15, 2019 - December 31, 2019: Phase one advertising to reinforce association of new name with old companies

January 1, 2020 – December 31, 2021: Phase two advertising to showcase key market differentiators and move away from using old company names. Current activities include continued distribution of the new logo for community events and sponsorships, changing existing signage and paid media...

Building Signage



#### PAID MEDIA STRATEGY AND BUY

Paid media following a brand launch is critical to reinforce the name change to audiences receiving additional communications, as well as to inform the general public not included in other groups. For this launch, a budget of \$3.3 million was allocated for the six months following launch — which equated to the last six months of 2019.

The budget was divided across the following mediums: television (traditional and streaming), radio (traditional and streaming), print, digital (including connected TV, Google AdWords, Google video and native video) and social (Facebook and LinkedIn traffic, reach and video ads).

Primary markets were West Virginia and Ohio (headquarter locations for both old companies) as well as Pennsylvania (high concentration of premium dollars for both companies). Secondary markets were cities spread across the footprint – from Wisconsin to New Hampshire, and from Vermont to Florida. The secondary markets were targeted through paid digital and social media efforts.

January 1, 2020 began a new budget cycle for Encova, following the fiscal year format. A budget of \$1 million was allocated for media this year, which targets the primary markets listed above. Several key company milestones are planned this year, around which the paid media buy will ebb and flow to complement these milestones.

#### EVALUATION METHODS AND RESULTS

Phase three post-launch is ongoing. Measured success – formal research that will allow us to gain perceptions, opinions and other valuable input –has not been completed at this time. However, initial feedback about the campaign from community and business leaders, policyholders, agents and many others has been extremely positive over the past several months. Internally, employees have had positive reactions to the brand.

Digitally, the campaign about the launch has done very well. In fact, through 2019, the campaign achieved more than 75 million impressions and more than 227,000 click-throughs to the new website (encova.com). Many of the ad types have been performing at and above benchmarks, and Encova search ads and videos have been earning high engagement rates with older audiences. Women were more engaged at first than men, but we started to see this even out toward the end of the year.

#### CLIENT'S MARKETING POINT OF CONTACT

Specifically, for the pre-launch and launch phases, CRA worked daily with three individuals: the executive chairman of the board of directors, the senior vice president and chief legal officer, and the assistant vice president of corporate communications. This team of leaders and CRA met weekly for nearly a year to discuss all things related to this campaign including but not limited to any challenges, issues and concerns, progression of the campaign and the review and approval process. We hosted hundreds of meetings with various individuals in dozens of departments and divisions. Despite this, it was the hard work and dedication of the team of three, along with CRA, that successfully lead the new Encova Mutual Insurance brand launch.

Print Ad



#### **KEY STAFF MEMBERS FOR THIS CAMPAIGN**

- Susan Lavenski, CEO Main Contact and CRA Team Lead
- Matt Fidler, Chief Creative Officer
- · Alisha Maddox, Chief Communications Officer
- · Kyra Harris, Vice President, Account Service
- Danny Forinash, Senior Account Executive
- Rick Mogielski, Vice President, CRA Film
- Alex Chaney, Director, CRA Film
- Kimm Boyd, Vice President, Media and Insights
- Tommy Dutton, Vice President, Digital
- · Carson Young, UI Developer/WordPress Expert

#### **REQUESTED REFERENCE FOR THIS CAMPAIGN**

#### **Greg Burton**

Former Executive Chair, Board of Directors Retired President & CEO Encova Mutual Insurance (304) 389-1110 Gburton717@aol.com

#### CRA's response to 4.3.2.1.2.3

There are a vast array of different stacks available to choose from when developing web applications. Often that choice is based on project requirements or simply a matter of personal preference. Here at CRA we specialize in the Microsoft stack WISA (Windows, IIS, SQL Server, ASP.NET). Our expertise using this stack is based on its ability to seamlessly integrate with clients existing Microsoft infrastructure. We have over 20 years of experience working with this stack, developing everything from simple single page sites to quite complex custom, multi-lingual, multi-site CMS's and user portals. In addition, we are also experienced in designing, creating and implementing WordPress sites utilizing the LAMP stack through our hosting partner WPEngine.

Our staff has a working knowledge of HubSpot and Salesforce as we have clients that utilize these CRM services. We also have three members of our staff that work with importing and exporting functionality and reporting on a daily basis. CRA also has expert web designers, software engineers, front-end developers, front-end designers and WordPress developers on staff. Additionally, our media team uses digital reporting to show campaign performance through key performance indicators such as page views, traffic sources, etc. We are a Google Partner, and our media experts are certified in Google Analytics. The team assists our clients every day in establishing accounts, managing accounts and producing reports to clients.

#### **WORDPRESS EXAMPLES**

We have designed, developed, implemented and maintain a number of WordPress sites including:

- visitorangevirginia.com
- parkline.com
- intrics.io (This site features integrations from the contact forms to HubSpot CRM.)

All of these sites are hosted through our WordPress hosting partner WP Engine and utilize automated plugin and infrastructure updates, security plugins and web application firewalls (WAF).



# d charles ryan associates **ADDENDUM** CRA HAS ALL THE INSURANCE CERTIFICATES REQUESTED FOR THIS RFP. ALSO, PLEASE SEE BELOW FOR CRA'S WOMEN-OWNED CERTIFICATIONS.



ALLAN L. MCVEY CABINET SECRETARY

## STATE OF WEST VIRGINIA DEPARTMENT OF ADMINISTRATION PURCHASING DIVISION

2019 WASHINGTON STREET, EAST CHARLESTON, WEST VIRGINIA 25305-0130

May 21, 2021

**CRA COMMUNICATIONS LLC** 601 Morris St Charleston, WV 25301-1416

Susan Lavenski:

This is to notify you that your Small, Women-, and Minority-Owned Businesses (SWAM) Certification Application has been approved on the basis of your representations that the vendor named above meets the definition of a Small, Women-, and Minority-Owned Businesses as set forth in the *West Virginia Code of State Rules* 148-22-1 et seq. This certification becomes effective:

#### 05/21/2021

And shall automatically expire without notice two years after the effective date unless revoked by the Purchasing Director or upon expiration pursuant to the *West Virginia Code of State Rules* 148-22-8. The type(s) of Small, Women-, and Minority-Owned Businesses (SWAM) Certification approved for your entity:

Small Business / Women-Owned Business

To maintain certification without lapse, a certified business shall apply to renew its certification at least 60 days prior to the end of the two-year certification period. Complete renewal instructions, recertification forms, and a list of all SWAM Certified entities are available online at www.state.wv.us/admin/purchase/VendorReg.html.

If you have questions, please contact the West Virginia Purchasing Division at 304-558-2306.

Sincerely,

Terra Oliver

Vendor Registration Coordinator

W. MICHAEL SHEETS

DIRECTOR



hereby grants

# National Women's Business Enterprise Certification

CRA Communications, LLC DBA Charles Ryan Associates

who has successfully met WBENC's standards as a Women's Business Enterprise (WBE). This certification affirms the business is woman-owned, operated and controlled and is valid through the date herein.

Valley

Certification Granted: August 28, 2017 Expiration Date: August 28, 2023 WBENC National Certification Number: WBE1701689 WBENC National WBE Certification was processed and validated by Women's Business Enterprise Council Ohio River Valley, a WBENC Regional Partner Organization.

Sheele Ci. Meyon



WBE ORV
WOMEN'S BUSINESS ENTERPRISE COUNCI
OHIO RIVER VALLEY

NAICS: 541613, 512110, 541430, 541611, 541810, 541820, 541830, 541890, 611430 UNSPSC: 80101504, 80141600, 80141601, 80141602, 80141604, 80141605, 80141612, 80141614, 80170000, 82100000, 82131603, 82141505





























JOIN FORCES, SUCCEED TOGETHER.

### HEREBY GRANTS WOMAN OWNED SMALL BUSINESS (WOSB) CERTIFICATION TO

#### CRA Communications, LLC DBA Charles Ryan Associates

The identified small business is an eligible WOSB for the WOSB Program, as set forth in 13 C.F.R. part 127 and has been certified as such by an SBA approved Third Party Certifier pursuant to the Third Party Agreement, dated June 30, 2011, and available at www.sba.gov/wosb.

The WOSB Certification expires on the date herein unless there is a change to the SBA's regulation that makes the WOSB ineligible or there is a change in the WOSB that makes the WOSB ineligible. If either occurs, this WOSB Certification is immediately invalid. The WOSB must not misrepresent its certification status to any other party, including any local or State government or contracting official or the Federal government or any of its contracting officials.

Majority Female Owner: Susan Lavenski

NAICS: 541613, 512110, 541430, 541611, 541810, 541820, 541830, 541890, 611430

UNSPSC: 80101504, 80141600, 80141601, 80141602, 80141604, 80141605, 80141612, 80141614, 80170000, 82100000, 82131603, 82141505

Certification Number: WOSB191342

Renewal Date: July 31, 2023

WOSB Regulation Expiration Date: 8/31/2024



Sheila Mixon, Women's Business Enterprise Council Ohio River Valley Executive Director

Should be marken

Pamela Prince-Easton, WBENC President & CEO

LaKesha White, Vice President, Certification

