

5.3.2. Title Page



Proposal Response

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State of West Virginia

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Description:

RFP# CRFP 1300 STO2600000001 - Advertising/Marketing/PR

Submitted to: State of West Virginia

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Cover Letter

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The State of West Virginia

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Subject: Proposal for Advertising/Marketing/PR

Dear Toby L Welch,

On behalf of (amp), I am pleased to submit our proposal for Advertising/Marketing/PR. At (amp), we believe that the most effective marketing campaigns don't just reach an audience—they inspire action. Our team specializes in developing and executing multi-channel campaigns that engage communities, shift perceptions, and drive measurable results. Whether raising awareness, increasing participation, or fostering long-term behavioral change, we craft strategies that make a lasting impact.

Our approach blends data-driven insights with creative storytelling, ensuring that messaging resonates across diverse platforms—including digital, social, traditional media, and experiential activations. We've successfully designed and launched campaigns that bring together stakeholders, leverage emerging technologies, and create meaningful connections with target audiences.

We are excited about the opportunity to collaborate with The State of West Virginia to develop a marketing campaign that delivers on your goals. Enclosed is our proposal outlining our expertise, methodology, and commitment to producing results-driven marketing strategies. We welcome the opportunity to discuss how our team can support your vision.

Best Regards,



MICHAEL NOBLE

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4.2. Scope of Services and Mandatory Requirements

Approach and Methodology

At (amp), we approach the Treasurer's Office's programs as both storytellers and strategists. The West Virginia State Treasurer's Office (STO) already manages some of the most impactful programs in the state, programs that return millions in unclaimed property, expand educational access through SMART529 and the Hope Scholarship, strengthen retirement security with WV457, and empower individuals with disabilities through WVABLE.

Looking ahead to 2025–2029, the Treasurer's Office has outlined priorities that include: expanding participation in financial education programs, growing 529 accounts and contributions, strengthening outreach for Unclaimed Property, and deepening trust through transparency and measurable results. Our methodology is designed to meet these goals, connecting programs with the people they serve while ensuring every campaign delivers measurable outcomes, transparent reporting, and clear value to the citizens of West Virginia.

Our Approach

At (amp), media is more than just placements and impressions—it's about creating meaningful connections that drive real impact. We pride ourselves on our track record of innovation in media planning and placement, constantly pushing the boundaries of traditional media buying. Our approach is centered on staying ahead of industry trends, adopting cutting-edge technologies, and continuously optimizing strategies to deliver impactful results for our clients. We don't just keep up with the evolving media landscape—we shape it, always exploring new opportunities to reach and engage audiences in smarter, more effective ways. Here's how we do it:

Our Approach

- **Innovation:** We're at the forefront of media trends, constantly innovating to give clients a competitive edge. From cutting-edge digital strategies to embracing emerging tech, we redefine possibilities in media.
- **Collaboration:** We believe in the power of teamwork. Our agency thrives on collaboration, internally and with clients. Diverse perspectives fuel creativity, resulting in impactful and resonant media campaigns.
- **Data-Driven Excellence:** Numbers guide our success. We're a data-driven agency, using analytics for precise audience targeting, performance evaluation, and strategic decision-making. Our excellence is rooted in actionable insights.
- **Client-Centric Approach:** Clients come first. We tailor media solutions to their unique needs, goals, and challenges. Beyond services, we build lasting partnerships, serving as trusted advisors for navigating the media landscape and achieving shared success.



This approach isn't just a philosophy—it's a commitment. Whether we're amplifying brand awareness, driving engagement, or optimizing performance, we bring a forward-thinking mindset to every campaign. (amp) doesn't just buy media; we build strategies that create lasting impact and measurable success.

Here's how we do it:

1. Discovery + Research

This phase is where listening begins. The Treasurer's Office is not just a financial agency; it is a public trust. Each program—Unclaimed Property, SMART529, Hope Scholarship, WVABLE, WV457, and financial education initiatives—has its own audience, motivations, and barriers to participation. To build campaigns that move people to act, we must understand those audiences as people, not just as demographics. The West Virginia State Treasurer's Office is not simply running programs; it is stewarding initiatives that touch lives in deeply personal ways, returning a grandmother's forgotten savings bond, helping a first-generation student pay for college, or allowing an individual with disabilities to save without fear of losing essential benefits. Before designing campaigns, we must understand these audiences not as statistics, but as people with hopes, challenges, and decisions to make.

We will begin with a program audit, mapping STO's current communications across digital channels, printed brochures, earned media, and community outreach. We will compare existing messaging against the 2025–2029 objectives to uncover gaps. For example:

- Are Unclaimed Property campaigns reaching older rural residents, where claims remain disproportionately unfiled?
- Is SMART529 connecting with young families and first-generation college parents, a key driver for program growth?
- Are financial education programs like *Get A Life* expanding into communities with lower high school completion rates?

We will engage stakeholders directly. Parents weighing SMART529 against the Hope Scholarship, individuals with disabilities and their families who rely on WVABLE, small business owners considering Retirement Plus, and educators delivering financial literacy programs will all help shape our understanding of audience needs.

Sample Deliverables: Stakeholder interviews, program audit, audience personas, message gap analysis.

2. Strategy

Strategy is where listening turns into direction. Each STO program has its own compelling promise, but when presented separately they risk competing for attention. Our role is to build a unified strategic framework that strengthens the Treasurer's Office brand while advancing the specific program goals set for 2025–2029. STO's programs are diverse, from Unclaimed

Property to SMART529, yet they share a common thread: financial empowerment for West Virginians. Without alignment, these programs risk speaking in parallel voices. Our strategic role is to braid them into a single, coherent framework, one that unifies messaging under the Treasurer's trusted brand while preserving the individuality that makes each program valuable. This step is about more than words; it is about charting journeys that carry a parent, retiree, or student from awareness to action, with messages tailored to their context and aspirations.

We will define core narrative themes to guide all campaigns:

- **Unclaimed Property:** "Returning what is rightfully yours" — supporting STO's mandate to expand awareness and increase annual claim totals.
- **SMART529 & Hope Scholarship:** "Investing in futures" — aligning with state goals of increasing college-going rates and family savings contributions.
- **WVABLE & WV457:** "Saving with dignity and security" — supporting STO's plan to expand enrollment and build trust with vulnerable populations.
- **Financial Education Programs:** "Building financial literacy for every generation" — reinforcing STO's push to make financial education a lifelong resource.

We will create audience journey maps, showing how a parent might first encounter SMART529 through social ads, then hear about the Hope Scholarship at a school event, and ultimately open an account after attending a webinar. Similarly, a retiree may learn of unclaimed property through a billboard, then be guided step-by-step via direct mail and online tools.

Finally, we will build a channel strategy that matches programs to the most effective platforms:

- **SMART529** → digital video, school partnerships, and social media for parents of young children.
- **Unclaimed Property** → TV, radio, outdoor, and local press for broad, statewide reach.
- **WVABLE** → trusted networks like disability advocacy groups and community organizations.
- **Retirement Plus** → employer partnerships and professional networks.
- **Financial education** → school programs, digital resources, and partnerships with teachers.

Sample Deliverables: Strategic framework, narrative themes, audience journey maps, channel strategy.

3. Creative Development

Creative is where strategy becomes human. Our challenge is to translate programs that can seem abstract, like deferred compensation or savings plans, into human-centered stories that inspire participation. Programs like deferred compensation or tax-advantaged savings accounts can feel abstract, even intimidating. Our challenge is to transform these concepts into stories that resonate, narratives that make a parent in Morgantown see a 529 as an investment in their child's future, or a retiree in Beckley recognize unclaimed property as their rightful inheritance.



In this phase, we translate financial mechanisms into everyday language, visuals, and emotions, ensuring every West Virginian can not only understand but feel compelled to act.

We will build campaigns that showcase the real impact of STO programs. For example:

- **Unclaimed Property:** A series of TV spots featuring West Virginians who discover long-lost savings, like the Charleston retiree who finds an old utility refund or the Huntington family reunited with a relative's life insurance policy.
- **SMART529 & Hope Scholarship:** Testimonial-driven digital campaigns highlighting students whose futures were made possible by these programs, directly supporting the Treasurer's goal of increasing new account enrollments.
- **WVABLE:** A video series featuring individuals with disabilities who share how WVABLE lets them save without jeopardizing benefits, bringing dignity and empowerment to life.
- **Financial Education:** Campaigns that follow real classrooms using *Get A Life*, showing students learning to budget, save, and plan for the future.

STO campaigns will transform financial programs into relatable, motivating narratives. All creative will be produced for omni-channel use, accessible to all audiences, and tailored to the cultural and geographic diversity of West Virginia, from the coalfields to the Eastern Panhandle.

Sample Deliverables: Creative briefs, video scripts, campaign concepts, multi-format mockups.

4. Activation

Activation is where stories meet real life. A statewide campaign cannot stop at billboards and social media, it must meet West Virginians in the spaces they already trust: their schools, their employers, their churches, their community organizations. Activation is the moment when a student sees a Hope Scholarship ad while scrolling TikTok, then hears about it again from a counselor at school. It's when a disability advocate brings WVABLE materials to a family meeting, or a small business owner first learns of Retirement Plus through their trade association. By combining broad statewide reach with hyper-local credibility, activation ensures that STO's programs move from awareness to participation.

- **Unclaimed Property:** Requires mass awareness. We'll use broadcast, radio, outdoor, and statewide digital campaigns to ensure every household knows the Treasurer may be holding their money. Campaigns will also target high-unclaimed-value counties, ensuring dollars are spent where claims potential is greatest.
- **SMART529 & Hope Scholarship:** Require targeted engagement. We'll work with schools, counselors, and parent groups to connect with families making education decisions. Campaigns will be timed with enrollment deadlines and financial aid calendars.
- **WVABLE:** Requires community trust. We will partner with disability organizations to co-create outreach materials, ensuring messages are delivered through voices families already trust.

- **WV457:** Requires employer engagement. Activation will include HR toolkits and employer partnerships to simplify enrollment and expand participation.
- **Financial Education:** Requires grassroots engagement. We will embed campaigns in schools, libraries, and community centers, connecting programs with West Virginians of all ages.

This layered approach ensures that every STO program achieves both broad visibility and local credibility, building awareness at scale while also fostering the trust that drives participation.

Sample Deliverables: Media schedules, geo-targeted buys, school and employer toolkits, community activation plans.

5. Deploy + Measure

The final phase is accountability, ensuring STO can show not just how dollars were spent, but what outcomes were achieved. In public service, results cannot be assumed, they must be demonstrated with clarity and transparency. This phase is about ensuring that every campaign dollar is tracked, every outcome is tied back to STO's 2025–2029 priorities, and every report gives both numbers and narratives. A dashboard that shows 1,000 new SMART529 accounts matters, but so does the story of the family in Logan County who opened their first college savings account. Measurement is not just about closing a campaign, it is about building confidence that STO's programs are delivering value to all West Virginians.

We will provide:

- **Real-Time Dashboards:** STO staff can monitor pacing, spend, and key metrics across all campaigns.
- **Mid-Campaign Reports:** Offering scenario modeling so STO can shift spend or creative mid-flight to maximize results.
- **Post-Campaign Reports (within 45 days):** Going beyond impressions to measure outcomes tied to 2025–2029 goals, Unclaimed Property claims filed, SMART529 accounts opened, WVABLE contributions increased, and student participation in financial education programs.

Measurement is also about equity and trust. We will provide the Treasurer's Office with transparent data that shows not only how campaigns perform overall, but also how they reach communities across West Virginia, including those historically underserved. Surveys and focus groups will add a qualitative layer, ensuring STO hears not just what worked, but how people experienced and felt about the campaigns.

Sample Deliverables: Dashboards, mid-campaign reports, attribution models, community feedback summaries, optimization roadmap.

Conclusion

Our approach is built on listening, storytelling, and accountability. By aligning campaigns with the Treasurer's 2025–2029 priorities, expanding 529 participation, returning more unclaimed

property, growing WVABLE and Retirement Plus enrollment, and building financial literacy across generations, we ensure that STO does not just inform West Virginians about programs, but inspires them to take part.

Where other approaches may stop at media placement, ours goes further: building trust, telling stories, and delivering measurable outcomes that matter for families, businesses, and communities across the Mountain State.

4.2.1. Scope of Services

4.2.1.1. Account Management

Account management for the West Virginia State Treasurer's Office is not just about meetings and reports, it is about ensuring that every taxpayer dollar is used effectively, and every program is represented with accuracy, consistency, and trust. STO oversees programs that touch citizens at pivotal life moments: returning unclaimed property, helping families plan for education, offering retirement security, and supporting individuals with disabilities through WVABLE. Each of these programs carries a high public trust component. Our account management approach is designed to honor that trust by being structured, transparent, and responsive.

Dedicated Team and Alignment with STO's Priorities

We recognize the complexity of STO's portfolio. A parent navigating both SMART529 and the Hope Scholarship has very different needs than a retiree filing for unclaimed property or an individual using WVABLE to save for the first time. That is why our Director of Client Services, Walter Harris, will assign a dedicated account management team with clearly defined roles:

- **Vice President of Media Strategy (Ruby DeWitt)** – Serves as Account Manager, aligning all campaigns with STO's 2025–2029 strategic priorities. Ruby ensures that long-term objectives, such as expanding 529 participation, advancing financial literacy, and supporting program enrollment, remain central to every campaign decision. Coordinates weekly updates and stakeholder touchpoints, ensuring STO staff have clarity on project status.
- **Project Manager** – Tracks deliverables across programs, recognizing that campaigns for unclaimed property often run concurrently with financial education pushes.
- **Media & Analytics Leads** – Provide program-specific reporting (e.g., claims filed, accounts opened, participants reached), tying metrics directly to STO's outcome goals.
- This structure mirrors STO's own focus on program accountability, separating functions by program while still reporting under the Treasurer's unified brand.

Weekly Progress Updates Rooted in Program Data

The RFP requires weekly updates, and we view those updates as more than status reports, they are opportunities to keep STO fully aligned with both campaign execution and strategic priorities. Each update will include:

- For Unclaimed Property, updates will include progress toward reducing the \$300M+ in assets currently held by STO.
- For SMART529, updates will track against enrollment growth goals outlined in the Treasurer's 2025–2029 plan, with segmentation by region and demographic to ensure equity.
- For WVABLE, reports will highlight outreach performance with disability communities, ensuring the program continues to grow beyond its already record-setting national standing.
- For Financial Education programs like *Get A Life*, updates will include school and student engagement numbers to align with STO's commitment to expand financial literacy statewide.
- Every update will tie back to STO's strategic objectives—making weekly memos not just administrative documents, but tools for decision-making.

Ad-Hoc Meetings and Responsiveness

We understand STO's environment is dynamic. Legislative cycles, policy announcements, and community partnerships often require rapid adjustments. Our team is structured to convene within 24 hours for ad-hoc meetings, whether that means pivoting creative around National Unclaimed Property Day, launching new messaging in response to Hope Scholarship enrollment deadlines, or responding to evolving legislation that impacts WVABLE or WV457.

This flexibility ensures that STO campaigns are always current, timely, and aligned with both state policy and public need.

Cost-Effective Management with In-House Resources

With 125+ full-time staff, (amp) provides account management entirely in-house. For STO, this matters for two reasons:

- **Cost Transparency** – With all services delivered in-house, STO will never see subcontractor markups or hidden costs. Every administrative hour is tied directly to a named (amp) staff member, so the Treasurer's Office knows exactly who is doing the work and how resources are being used. This structure ensures efficiency, fiscal responsibility, and a clear line of accountability.
- **Specialization** – Because our staff already brings deep experience in public sector campaigns, less time is spent on onboarding or ramp-up, and more time is spent delivering measurable results. Our past work with municipalities and state agencies has shown that this familiarity accelerates timelines, reduces missteps, and ensures communications are tailored to the needs of diverse constituencies.

We use a tiered process to keep costs under control while giving STO the right level of visibility at the right time:

- **Weekly Tactical Updates & Memos** – Delivered in clear, concise format so STO staff always know what's happening across programs. These updates reduce back-and-forth emails by proactively answering questions on deliverables, budget use, and next steps.

- **Monthly Strategic Reviews** – Each month, we elevate reporting beyond daily execution, connecting campaign activities directly to STO’s 2025–2029 strategic priorities. These reviews highlight not just what was delivered, but how those efforts are advancing long-term goals.
- **Real-Time Dashboards** – Accessible dashboards replace redundant reporting requests by giving STO staff on-demand visibility into campaign performance. Whether it’s tracking how many new SMART529 accounts were opened in a given month or monitoring engagement with WVABLE outreach, the data is always current and transparent.

This tiered structure ensures STO gets oversight without overhead: enough touch points to keep leadership informed, but no unnecessary administrative layers that inflate costs or slow down decision-making.

Accountability as Public Trust

Account management is ultimately about accountability, not just to STO leadership, but to the citizens of West Virginia. Every administrative decision we make is in service of ensuring West Virginians:

- Claim the money they are owed through Unclaimed Property.
- Open college savings accounts through SMART529.
- Access savings tools like WVABLE and Retirement Plus.
- Gain lifelong financial skills through programs like *Get A Life*.

By tying account management directly to program outcomes, we make sure STO staff have full visibility into progress and can demonstrate to the public that these programs are delivering real results.

Conclusion

Our account management approach gives STO more than weekly reports, it provides a framework for clarity, responsiveness, and accountability. By grounding updates in program-specific data, aligning with 2025–2029 priorities, and eliminating cost inefficiencies, we ensure that every administrative action contributes to STO’s larger mission: to empower West Virginians through access, trust, and financial opportunity.

4.2.1.2. Campaign Strategy (Research, Planning & Budgeting)

When a grandmother in Logan County learns she is owed utility refunds, when a Beckley parent chooses between SMART529 and the Hope Scholarship, or when a young veteran opens a WVABLE account without risking benefits, these are not abstract outcomes. They are life-changing moments. The West Virginia State Treasurer’s Office (STO) has a mandate to deliver these opportunities across the state: returning record levels of unclaimed funds, maintaining a nationally top-ranked college savings plan, expanding WVABLE, strengthening Retirement Plus, and administering a rapidly growing Hope Scholarship program. A successful campaign strategy

must respect that reality. It must be grounded in research, built around the diversity of West Virginia communities, and measured not by advertising outputs, but by tangible program results, such as, claims filed, accounts opened, contributions increased, and applications completed.

1. Discovery & Research

The Treasurer's Office is not just administering programs; it is shaping financial futures. Each initiative, from Unclaimed Property, SMART529, WVABLE, Retirement Plus, Hope Scholarship, to "Get A Life", has distinct audiences, motivations, and barriers. Understanding these nuances is the foundation of effective strategy. At every stage, STO staff are included in the design of research instruments, the selection of stakeholder groups, and the interpretation of findings. This ensures that discovery is not an external exercise, but one built with STO's direct input.

We begin with a program-by-program audit of STO communications, earned media coverage, seasonal cycles, intake processes, and community outreach. Each is mapped against the audiences it serves:

- **Unclaimed Property:** general public, small businesses, and nonprofits. With \$40.6M returned in FY2025, we focus on regions where awareness lags and conversion from search to claim is lowest.
- **SMART529:** new parents and young families. Despite being a top-ranked plan nationally, participation gaps remain in rural counties; our research pinpoints friction at the account creation stage.
- **WVABLE:** individuals with disabilities, families, and employers. With 948 active accounts and \$9.66M in assets, the main barriers are benefits-related fears and limited employer integration.
- **Retirement Plus (457):** public employees statewide. Onboarding and benefits fairs are high-potential touchpoints, but messaging must clarify long-term advantages in plain terms.
- **Hope Scholarship:** K-12 parents and educational providers. Rapid program expansion requires clarity on eligibility, expenses, and deadlines.
- **Financial Education ("Get A Life"):** middle school students, teachers, and volunteers. With over 140 schools and 16,000 students annually, this program offers an unparalleled distribution channel for embedding STO messaging.

Our listening process combines stakeholder interviews (with program leads, county clerks, HR directors, teachers, and advocates) with quantitative surveys and moderated focus groups. We test messaging, program websites, and application flows to identify where citizens encounter confusion or disengagement.

Sample Deliverables: Stakeholder interview compendium, program audit, audience personas, barrier and opportunity maps, "Life Moments" timeline (e.g., birth → SMART529, diagnosis → WVABLE, new job → Retirement Plus, school choice windows → Hope).

2. Strategy

Strategy transforms research into clarity. For the Treasurer's Office, the challenge is not to run six parallel campaigns, one for Unclaimed Property, one for SMART529, one for WVABLE, and so on, but to weave them into a single, coherent Treasury story. That story must be anchored in the credibility of the Office itself, while still allowing each program to shine on its own merits. West Virginians do not experience these programs in isolation: the same parent who claims unclaimed property might later open a SMART529 account, apply for the Hope Scholarship, and eventually contribute to Retirement Plus through public employment. Research tells us that awareness is often highest when programs are presented in the context of life stages, not as stand-alone initiatives. By framing STO as a trusted partner at every stage, from reclaiming what is rightfully yours, to saving for education, to planning for retirement, we create continuity across campaigns. The result is a communications system that builds cumulative trust, reduces duplication of effort, and maximizes the return on every dollar spent.

We convene planning workshops with STO stakeholders to establish program-specific goals, priority audiences, seasonal windows, and outcome-based KPIs. For example:

- **Unclaimed Property:** increase verified claims and average claim values, supported by proactive matching initiatives such as WV Cash Now.
- **SMART529:** expand new accounts through Bright Babies mailers and early school outreach, while encouraging recurring contributions among current account holders.
- **WVABLE:** drive new accounts and contributions, reduce benefits-related concerns, and expand employer direct-deposit options.
- **Retirement Plus:** increase enrollments at onboarding and drive contribution increases timed to pay cycles.
- **Hope Scholarship:** improve on-time, error-free applications and expand the roster of qualified providers, particularly in rural areas.

This integrated approach ensures each program's campaigns reinforce the others, creating consistent messaging across the STO portfolio. It is superior because it is tied directly to STO's 2025–2029 strategic priorities and builds accountability into every step.

3. Creative Development

Creative development is where strategy takes shape in ways people can see and feel. This is where our discovery and research, strategy, and listening become tangible. Programs such as deferred compensation or 529 accounts often seem abstract, even intimidating, when explained in technical terms. But when those same programs are framed through the lived experiences of West Virginians, parents saving for their child's first semester, a young worker starting a retirement plan, or a family opening a WVABLE account for greater independence, they become approachable, relevant, and inspiring.

To do that consistently, we follow a structured process that moves from research to story to polished deliverables:

- **Mood Boards & Narrative Exploration**
We translate Discovery + Research findings into visual and narrative directions. For example, if research shows parents respond to messages about future opportunity while retirees connect with *peace of mind*, we present mood boards and narrative concepts that test both approaches.
- **Sample Deliverables:** Mood boards (color, imagery, typography), narrative concept one-pagers, story themes document.
- **Message Alignment & Testing**
Before production, we refine messaging in alignment with STO's goals. For Unclaimed Property, that means addressing skepticism with *trust and urgency*. For WVABLE, it means centering dignity and independence. We test calls-to-action with sample audiences to ensure resonance.
- **Sample Deliverables:** Message frameworks, call-to-action testing summaries, headline/visual A/B test results.
- **Versioning & Format Adaptation**
Each creative direction is developed into multiple versions, broadcast, social, digital display, radio, direct mail. This ensures consistency across platforms while adapting tone to the medium. For example, a :15 SMART529 social video complements a :30 broadcast spot.
- **Sample Deliverables:** Storyboards, :30 and :15 video scripts, radio ad scripts, print mockups, digital banner ad sets.
- **Iterative Refinement**
We provide STO with at least two creative concept directions per campaign, refined through structured feedback. By incorporating input at every stage, we avoid wasted cycles and ensure final creative reflects STO's strategic priorities and West Virginians' lived experiences.
- **Sample Deliverables:** Two creative concept decks, stakeholder feedback summaries, revised concept round(s).
- **Final Production & Delivery**
All creative assets, broadcast commercials, social videos, print collateral, radio spots, digital ads, are produced in-house by (amp)'s 125+ specialists. This guarantees quality, eliminates subcontractor markups, and maintains accountability from storyboard through delivery.
- **Sample Deliverables:** Broadcast-ready TV spots (:30, :15, :06), print-ready PDFs, digital banner packages, social media video exports, radio/audio masters, photography libraries.

Sample Mood Board**4. Media & Channel Plan: Statewide reach with precise activation**

Effective campaigns are not only about reach; they are about resonance. For the West Virginia State Treasurer's Office, reach means every county, every community, every household. But resonance means tailoring messages to the moments when West Virginians are most likely to listen, trust, and act.

Our statewide scaffolding ensures broad visibility, through broadcast TV and radio, streaming video and audio, statewide news outlets, and high-visibility out-of-home (OOH) placements. These channels establish the Treasurer's Office as a trusted, household presence. Layered on top are program-specific activations timed to life events and seasonal cycles, touchpoints informed by our research into audience behaviors and participation trends:

- **Unclaimed Property** – Our research found that skepticism is the greatest barrier: most people doubt “lost money” is real. That’s why timing matters. National Unclaimed Property Day, tax season, and the West Virginia State Fair are natural credibility moments. Mobile “claim tents” at the fair, for example, turn abstract dollars into lived experiences—neighbors walking away with checks in hand.
- **SMART529** – Parents often begin saving within the first two years of a child’s life. To meet them in those moments, we align with pediatricians’ offices, K–2 school calendars, and library story hours. A mailer that arrives with a birth announcement or a SMART529 booth at kindergarten roundup is far more powerful than a generic ad.

- **WVABLE** – Disability advocates stressed the importance of trust and peer validation in our research. That’s why we partner with disability networks, HR benefits fairs, and PEIA webinars, culminating in an annual “ABLE Savings Day.” The message is not just “open an account,” but “join a community that believes in your independence.”
- **WV457 Retirement Plus** – Public employees most often make benefit decisions during onboarding or union enrollment. Intranet takeovers, HR webinars, and union newsletters ensure Retirement Plus is positioned not as an extra step, but as a benefit that belongs to them from day one.
- **Hope Scholarship** – Application windows are stressful and fast-moving. By showing up at homeschool association events, libraries, and parent groups, we meet families in places they already trust. Messaging focuses on access and empowerment: “Your child’s education, your choice—made possible through the Treasurer’s Office.”

This layered strategy leverages the community partnerships already central to STO, schools, disability advocates, municipal leagues, while amplifying them through paid statewide campaigns. It ensures no program is siloed, no audience is missed, and no message is generic. Every touchpoint is both broad enough to build trust in the Treasurer’s Office and specific enough to drive action for each program.

5. Budgeting & Stewardship

Managing taxpayer resources is as important as reaching audiences. For the Treasurer’s Office, every dollar invested in awareness must be both accountable and effective. Our budgeting approach is built on transparency, control, and leverage, ensuring that campaigns not only achieve their goals but do so with fiscal responsibility.

We present budgets in Good/Better/Best scenarios for each program, showing trade-offs in reach, frequency, and expected outcomes. This allows STO to make informed decisions, balancing broad statewide coverage with program-specific depth. In addition, we model an integrated “One Treasury” scenario where production, research, and creative assets are shared across programs, maximizing efficiency while maintaining tailored messaging.

- **Transparency** – Every budget includes clear line items for media, creative, research, production, and administration. STO staff will see exactly how each dollar is allocated and what outcomes it supports. For example, a SMART529 campaign budget would show distinct allocations for pediatric partnerships, social media video ads, and printed enrollment kits.
- **Controls** – We implement weekly pacing reports tied directly to program KPIs (e.g., claims filed, new accounts opened, participants reached). A $\pm 5\%$ variance alert system ensures early detection of over- or under-spending. No reallocations occur without written STO approval, protecting fiscal accountability.
- **Leverage** – Shared creative and production assets reduce duplication. For instance, family casting for a SMART529 testimonial video can also serve Hope Scholarship

campaigns. Similarly, HR toolkits produced for WVABLE can be adapted for Retirement Plus, saving both time and money.

Our research shows that skepticism is the main barrier for programs like Unclaimed Property, while complexity is the barrier for SMART529 and Retirement Plus. Efficient use of funds allows us to invest more in overcoming those barriers, whether that means targeted credibility campaigns during tax season or simplifying enrollment with step-by-step videos. By aligning budget discipline with program insights, STO can ensure campaigns resonate with audiences while maintaining cost efficiency.

Sample Deliverables: Good/Better/Best budget scenarios per program, “One Treasury” integrated budget model, weekly pacing reports with variance alerts, shared asset libraries for cross-program campaigns.

6. Mid-Campaign Assessment: Optimizing in Real Time

A campaign is only as strong as its ability to adapt. For the Treasurer’s Office, this is especially important—because audiences engaging with Unclaimed Property during tax season, or parents applying for the Hope Scholarship, won’t wait six months for improved messaging. They need clarity and connection now.

At the mid-point of each campaign, we deliver a comprehensive optimization report that goes beyond surface metrics. This memo is structured around three components:

- **Performance Analysis by Audience Segment** – Using tools such as Google Campaign Manager 360, Meta Ads Manager, and program-level KPIs (e.g., accounts opened, claims filed, inquiries generated), we identify which audiences are responding best. For instance, if WVABLE sees higher engagement from younger caregivers than from financial planners, budget allocation will pivot to strengthen that channel.
- **Channel & Creative Effectiveness** – We compare results across platforms—broadcast vs. streaming, Meta vs. search, long-form vs. short-form video—to see which formats are resonating.
- **Scenario Planning** – Rather than a single recommendation, we provide STO with multiple reallocation models based on data. Each scenario outlines projected reach, frequency, and conversion outcomes if funds are shifted. This gives STO leadership the clarity to make informed decisions that align with both budget and strategic priorities.

By reassessing campaign data mid-flight, we can directly address these barriers in real time, for example, inserting credibility-focused creative in underperforming regions or simplifying message sequences where drop-off occurs. This proactive approach ensures that campaigns adapt while they are live, capturing opportunities instead of losing them.

Sample Deliverables: Mid-campaign optimization memo (audience insights, channel performance, scenario-based budget reallocation), revised media plan, updated creative assets (where necessary), and a 30-minute alignment call with STO staff to confirm adjustments.

7. Measurement & Reporting

We measure success by outcomes, not just outputs. STO deserves more than click-through rates, it deserves clear evidence that programs are reaching West Virginians, driving participation, and building long-term trust in the Treasurer's Office.

KPI Framework by Program

- **Unclaimed Property:** verified claims, total dollars returned, cost per claim, county coverage.
- **SMART529:** new accounts opened, recurring contributions, average contribution size.
- **WVABLE:** new accounts, average balances, employer partners added.
- **Retirement Plus:** enrollments, contribution step-ups, partner adoption rates.
- **Hope Scholarship:** completed on-time applications, provider enrollments, geographic equity.
- **Financial Education:** number of schools and students reached, volunteer hours, opt-in follow-ups.

Real-Time Reporting & Optimization

Performance is monitored continuously through:

- **Custom Dashboards** (Looker Studio, Tableau, Power BI) for live insights accessible to STO staff.
- **Automated Alerts & Pacing Controls** to keep spend within $\pm 5\%$ variance.
- **Audience & Creative Analysis** to identify top-performing segments and variations.

If a campaign underperforms in one region, we adjust immediately, shifting bidding strategies, creative treatments, or audience segments, to ensure efficiency and impact.

Post-Campaign Reporting

Delivered within 45 days of campaign close, reports combine quantitative performance data with qualitative insights from surveys and focus groups. STO will know not just what worked, but how people felt about the message.

Measuring Long-Term Impact

We extend measurement beyond campaign windows:

- **Customer Lifetime Value (LTV) Analysis** to evaluate sustained engagement and repeat participation.
- **Retention Metrics** to ensure programs are creating loyal users, not one-time claims.
- **Brand Lift & Sentiment Studies** to assess shifts in trust, perception, and public confidence.

Financial trust is not built overnight, it is earned through consistency, transparency, and measurable results. By combining real-time optimization with long-term impact analysis, we ensure that STO campaigns are not only efficient today but also strengthen the Treasurer's Office for years to come.

8. What success looks like in Year One

- +15% increase in verified Unclaimed Property claims, with gains in under-reached counties.
- +12% growth in new SMART529 accounts and +8% increase in recurring contributions.
- +20% increase in WVABLE accounts, plus 5–7 new employer direct-deposit partners.
- +10% increase in Retirement Plus enrollments and a 1 percentage point increase in average deferrals.
- Increase in on-time Hope Scholarship applications and provider enrollment, especially in rural regions.
- Maintain or grow “Get A Life” reach while embedding STO calls-to-action.

9. Risks & Mitigations

- **Eligibility confusion (WVABLE, Hope):** address with plain-language explainers, eligibility wizards, and partner toolkits.
- **Seasonal overlap (tax season, school choice windows):** stagger campaign bursts and reserve contingency for opportunistic PR.
- **Rural reach gaps:** combine statewide broadcast with local grassroots activation (libraries, schools, fairs, churches).
- **Contact center strain during surges:** forecast lift, phase outreach, and add self-serve support materials.

10. Sample Deliverables

- **Research:** audience personas, program audits, barrier analysis.
- **Strategy:** seasonal media calendar, KPI framework, cross-program alignment guide.
- **Creative:** message frameworks, storyboards, plain-language guides, toolkit assets.
- **Media:** statewide scaffolding + targeted activations.

Governance: weekly progress reports, mid-campaign optimization memos, final post-campaign reports.

West Virginians do not need more advertisements, they need clarity, trust, and an invitation at the right moment. Our campaign strategy is designed to deliver that, grounded in research, aligned with STO’s 2025–2029 priorities, and measured by real outcomes that strengthen lives and communities.

Please see attached sample project budget proposals, campaign strategies, and post-campaign reporting including summaries of project outcomes, insights, performance data and other relevant information.



Toast to Tradition Digital Campaign

PERFORMANCE SUMMARY

March - May 2023

Discovery Channel + Lunazul Tequila

TOAST TO TRADITION

PERFORMANCE RECAP OUTLINE

- Key Delivery Highlights ([slide 3](#))
- Meta Brand Lift Study Results ([slide 4](#))
- Campaign Elements and Delivery Summary ([slide 5](#))
- Custom Landing Page & Social Promotion ([slide 6](#))
- Digital Video Performance ([slide 11](#))
- Appendix ([slide 15](#))



Discovery Channel + Lunazul Tequila

TOAST TO TRADITION DELIVERY HIGHLIGHTS

36MM+

impressions of integrated
social content

4.3MM+

3-second views of the
integrated social videos

17.9K+

engagements with
integrated social content

100K+


clicks on integrated social content to visit
the custom landing page

76K+

custom landing page visits
on Discovery.com

5.2MM+

CTV/VOD impressions



"How likely are you to consider Lunazul?"

+1.7pts lift*
in consideration, overall

vs. +0.6pts CPG benchmark

vs. +1.7pts North America benchmark

***Toast to Tradition* drove significant lifts in consideration for Lunazul among men**

according to a Meta Brand Lift Study

Consideration (action intent) on Facebook and Instagram was strong among A25-34 (+3.8pts) and A45-54 (+4.3pts), and when looking by gender, men in these age groups saw particularly strong lifts.

Specifically, consideration among **M45-54 increased from a baseline of 0% to 6.5%**, while **M25-34 increased from 11.8% to 16.5%** who would consider Lunazul. These lifts are 7.8x+ better than Meta's CPG benchmarks (which represent the effectiveness of Lunazul running its own ads).

Brand awareness for Lunazul also saw a strong lift among M35-44, jumping from 10.7% to 16.2%.

* Chance of lift in consideration caused by this campaign is 85% or greater

Source: Meta Brand Lifts are defined as the lift, or difference, between a group that was exposed to Discovery Channel + Lunazul social content, and a control group that was not exposed (polls are delivered within 4-48 hours of exposure).

Discovery Channel + Lunazul Tequila

TOAST TO TRADITION DIGITAL ELEMENTS + DELIVERY SUMMARY

	DATE POSTED	PLATFORM	GUARANTEEE	DELIVERED	INDEX	UNDER/OVER
SOCIAL MEDIA ELEMENTS						
4x Hosted Advertorial Social Videos	Mar 15, Mar 25, Apr 7 & Apr 12	Discovery Channel Facebook	4,000,000 video views	4,343,405 video views	109%	+343,405
Reposts of 4x Hosted Advertorial Social Videos	Mar 23, Mar 30, Apr 7 & Apr 14	Expedition Unknown Facebook	added value	25,821 video views	-	-
Reposts of 4x Hosted Advertorial Social Videos	Mar 15, Mar 25, Apr 7 & Apr 12	Josh Gates Facebook, Instagram & Twitter	added value	-	-	-
2x Hosted Instagram Story Ads	Mar 25 & Apr 12	Discovery Channel Instagram	5,000,000 impressions	5,398,099 impressions	108%	+398,099
DISCOVERY.COM ELEMENTS						
1x Custom Landing Page	Mar 15 - May 27	Discovery.com	-	71,699 visits	-	-
DIGITAL VIDEO ELEMENTS						
Discovery Portfolio Premium Targeted Midroll Video Bundle	Feb 10 - May 27	RON & ROS TVE, VOD, D+	5,171,702 impressions	5,275,947 impressions	102%	+104,245

Data Sources: Facebook Ads Manager and Creator Studio, Pinterest, Adobe Analytics, DCM





Performance Overview

CUSTOM LANDING PAGE & SOCIAL PROMOTION

Discovery Channel + Lunazul Tequila 1X CUSTOM LANDING PAGE

WHAT DISCOVERY CHANNEL CREATED

Discovery Channel created one custom landing page, *A Toast to Tradition*. The page lived on Discovery.com, and aggregated the four advertorial social videos alongside photos from Josh Gates' journey and a CTA to visit to LunazulTequila.com.

Each of the four advertorial social videos and two Instagram Story ads directed viewers to this custom landing page. In addition to the social elements, digital video ads also directed viewers to explore the custom landing page.

PERFORMANCE HIGHLIGHTS

A Toast to Tradition received **71,699 visits** from March 15th through May 27th, with engaged visitors spending an average **2:44 per visit**. Visitors to the page clicked to LunazulTequila.com on either the featured products or call to action of "learn more about Lunazul" **436 times**.



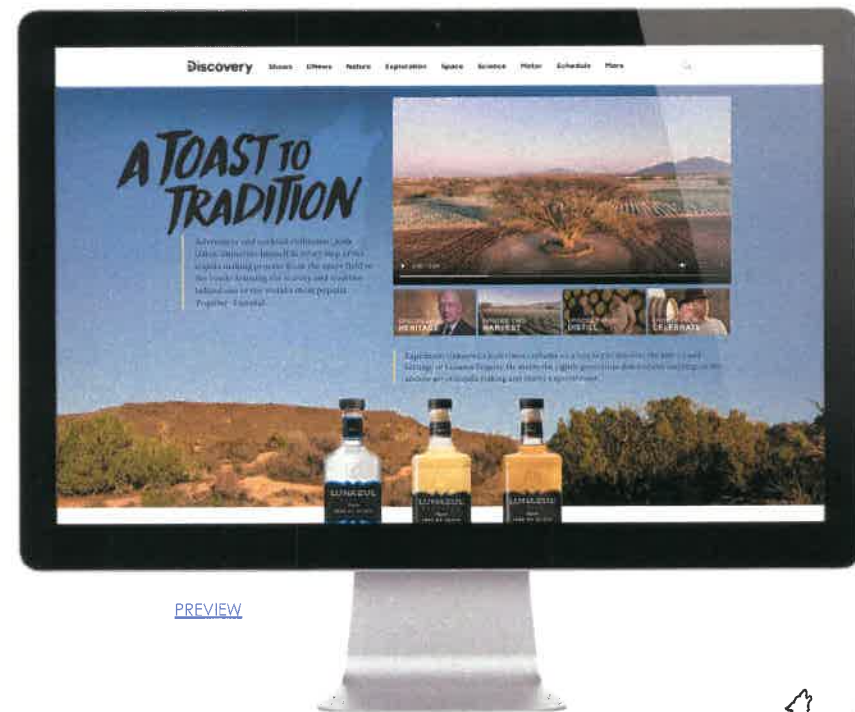
71,699
VISITS



2:44
AVG TIME SPENT



436
CLICKS TO LUNAZUL



Discovery Channel + Lunazul Tequila

4X HOSTED ADVERTORIAL SOCIAL VIDEOS

| Additional Detailed Metrics

WHAT DISCOVERY CHANNEL CREATED

Discovery Channel created four advertorial social videos, each posted to Discovery Channel Facebook and promoted through April 30th. The videos were hosted by Josh Gates as he explores a different part of what goes into Lunazul Tequila and its rich history. Lunazul Tequila was integrated within the videos via logo placement throughout, mentions of the brand and product integrations, and in some cases, interviews with employees. Each video included a call to action of "Learn More", driving viewers to the custom landing page on Discovery.com.

PERFORMANCE HIGHLIGHTS

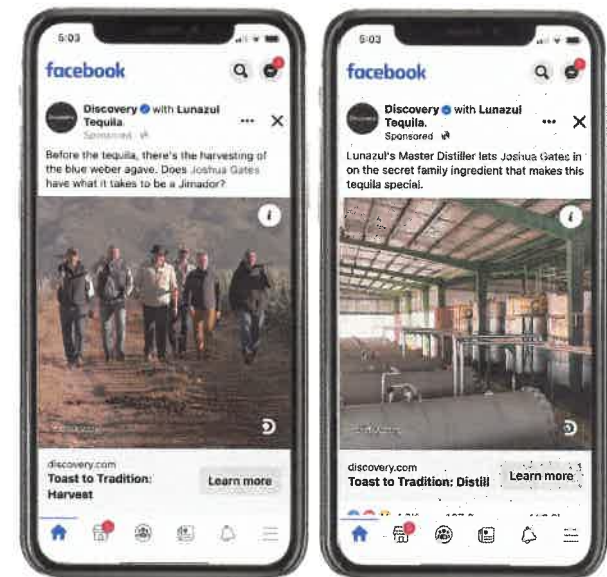
Combined, the four videos delivered **4,434,405 video views** on Facebook, garnering **17,829 engagements** and **97,215 clicks** to the custom landing page on Discovery.com.

Overall, **Heritage and Distill saw the strongest performance of the four advertorial social videos**. Those two videos not only exceeded completion rate benchmarks, but viewers were also more likely to engage with the post or click through to the custom landing page when compared to Discovery Channel's overall benchmarks.

- *Heritage* saw strong viewer retention and the strongest overall engagement score, delivering **1,004,741 video views** and 20,602 link clicks - a **0.35% CTR** (134 index). There were **5,380 engagements** across sharing, saving, commenting and reacting, with viewers reacting most often.
- *Harvest* also saw strong viewer retention compared to Discovery Channel benchmarks, delivering **1,180,909 video views** and 22,335 link clicks - a lower **0.22% CTR** (85 index). Engagement with this video also fell short of benchmarks.
- *Distill* had the strongest overall viewer retention and CTR, delivering **1,075,813 video views** and 32,182 link clicks, a strong **0.46% CTR** (178 index). Viewers were most likely to share this video, along with saving and reacting.
- *Celebrate* saw a strong CTR compared to Discovery Channel benchmarks. The video delivered **1,081,942 video views** and 22,096 link clicks, a **0.29% CTR** (110 index). Engagement with this video fell short of benchmarks.

 **4.3MM+**
VIDEO VIEWS

 **17K+**
ENGAGEMENTS



Discovery Channel + Lunazul Tequila

EXPEDITION UNKNOWN & JOSH GATES VIDEO POSTS

| [Additional Detailed Metrics](#)

WHAT DISCOVERY CHANNEL CREATED

Expedition Unknown's Facebook page also shared the four advertorial social videos. Each video included a link either in post comments or text.

Josh Gates also shared the four videos on his Facebook, Instagram and Twitter.

PERFORMANCE HIGHLIGHTS

Combined, the four Expedition Unknown videos delivered **25,821 video views** on Facebook, garnering **3,134 engagements** and **322 clicks** to the custom landing page on Discovery.com.

Similarly to the videos posted on Discovery, *Heritage* and *Distill* saw the strongest performance of the four social videos. All videos saw strong viewer engagement & retention. Reacting generated the majority of engagements for all four videos.

The Josh Gates' posted videos delivered **more than 236K views**, garnering **35,052 engagements** on Facebook, Instagram and Twitter. *Heritage* and *Distill* again were the strongest performers, with the majority of engagements coming from likes/reactions.



Discovery Channel + Lunazul Tequila

2X HOSTED INSTAGRAM STORY ADS

| [Additional Detailed Metrics](#)

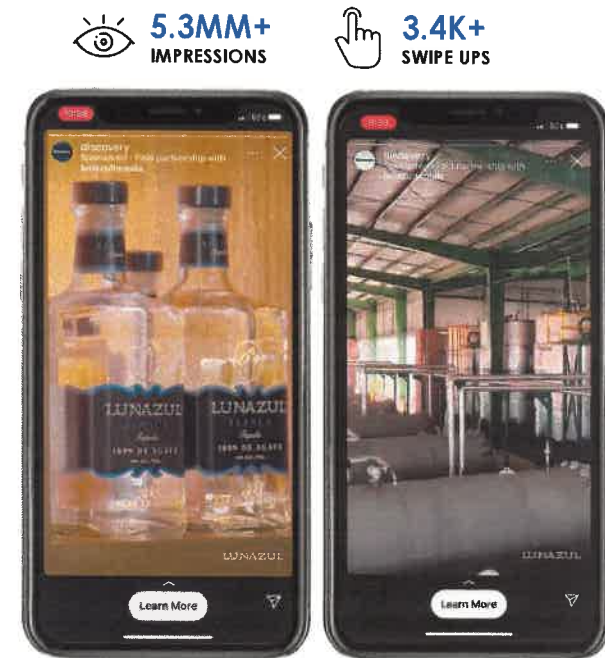
WHAT DISCOVERY CHANNEL CREATED

To accompany the advertorial social videos, Discovery Channel created two Instagram Story ads. Each highlighted moments from the videos, continuing to feature Josh Gates as he explores and learns the history of Lunazul Tequila. The first Instagram Story ad launched March 25th, coinciding with the launch of the *Harvest* advertorial social video, while the second launched April 12th, coinciding with the launch of the final advertorial video, *Celebrate*. Both Instagram Story ads were promoted through April 30th, and included Lunazul integration via logo placement, as well as product mentions and highlights throughout.

PERFORMANCE HIGHLIGHTS

Combined, the two Instagram Story ads delivered **5,398,099 impressions** and **3,433 swipe ups** to the custom landing page on Discovery.com. Both story ads saw below benchmark swipe-up rates, which shows us that a stronger call-to-action is needed in future executions to entice users to want to find out more.

- *Heritage & Harvest* delivered **2,793,997 impressions**, reaching 1.1MM unique Instagram users. The three-frame Instagram Story ad generated 1,682 swipe ups to the custom landing page, a 0.06% swipe-up rate – falling below the 0.12% benchmark. Roughly 60% of the swipe ups occurred on the first frame, with the remaining 40% split relatively evenly across frames two and three.
- *Distill & Celebrate* delivered **2,604,102 impressions**, reaching 1.4MM unique Instagram users. The three-frame Instagram Story ad generated 1,751 swipe ups to the custom landing page, a 0.07% swipe-up rate – again falling below the 0.12% benchmark. Similar to the first Instagram Story ad, 60% of the swipe ups occurred on the first frame, with the remaining 40% split relatively evenly across frames two and three.





Performance Overview

DIGITAL VIDEO PERFORMANCE



Discovery Channel + Lunazul Tequila

RON AUDIENCE TARGETED & ROS VIDEO PERFORMANCE

METRIC	RON & ROS Video Bundle			TOTALS
	TVE	D+	VOD	
Impressions	1,610,043	503,581	2,020,135	4,133,759
Video Completes	1,595,344	496,632	1,895,093	3,987,069
VCR	99.08%	98.62%	93.81%	96.45%
Discovery VCR Benchmark	98.79%	99.03%	97.17%	-
Vs. Benchmark	+0.29%	+0.41%	-3.36%	-

CTV

3,513,695
 Impressions

Desktop

206,688
 Impressions

Mobile

413,376
 Impressions



Discovery
NAKED & AFRAID
436,240
 Impressions

DEADLIEST CATCH
193,176
 Impressions

Discovery
BATTLEBOTS
120,670
 Impressions

NAKED & AFRAID XL
116,582
 Impressions



Discovery Channel + Lunazul Tequila

LIMITED COMMERCIAL INTERRUPTION SPONSORSHIP

METRIC	EXPEDITION UNKNOWN		TOTALS
	10:06 Custom Open	Mid-Roll	
Impressions	158,519	683,093	841,612
Video Completes	153,319	680,838	834,157
VCR	96.72%	99.67%	99.11%
Discovery ICI VCR Benchmark	91.12%	98.88%	
Vs. Benchmark	+5.6%	+0.79+	

CTV



589,128
Impressions

Desktop



168,322
Impressions

Mobile



84,162
Impressions



EXPEDITION UNKNOWN



Discovery Channel + Lunazul Tequila

DISCOVERY+ PAUSE AD

METRIC	TOTALS
Impressions	300,576
QR Code Scans	79

BEFORE THE 90 DAYS

14,156
Impressions

90 DAY FIANCÉ

10,132
Impressions

GHOST ADVENTURES

9,568
Impressions

Discovery
NAKED & AFRAID

7,861
Impressions



THANK YOU!



Discovery



APPENDIX

Discovery Channel + Lunazul Tequila

APPENDIX CONTENTS

SLIDE #	CONTENT
<u>17-18</u>	4x Advertorial Social Videos: Detailed Promotion Metrics & Screenshots
<u>19-22</u>	4x Added Value Posts & Josh Gates Posts: Detailed Promotion Metrics & Screenshots
<u>23-24</u>	2x Instagram Story Ads: Detailed Promotion Metrics & Screenshots
<u>25</u>	Social Performance Index Overview
<u>26</u>	Definitions of Social Metrics

Discovery Channel + Lunazul Tequila

TOAST TO TRADITION: SOCIAL VIDEO SCREENSHOTS

Heritage



[Preview](#)

Harvest



[Preview](#)

Distill



[Preview](#)

Celebrate



[Preview](#)

Discovery Channel + Lunazul Tequila

TOAST TO TRADITION: SOCIAL VIDEO PERFORMANCE

METRIC	HERITAGE (3/15)			HARVEST (3/25)			DISTILL (4/7)			CELEBRATE (4/12)		
	AMOUNT	RATE/SCORE	PERFORMANCE INDEX	AMOUNT	RATE/SCORE	PERFORMANCE INDEX	AMOUNT	RATE/SCORE	PERFORMANCE INDEX	AMOUNT	RATE/SCORE	PERFORMANCE INDEX
Post Impressions	5,935,271	-	-	10,164,716	-	-	6,963,780	-	-	7,700,968	-	-
Unique Reach & Freq	2,402,004	2.5x	-	3,938,240	2.6x	-	2,611,665	2.7x	-	3,270,136	2.4x	-
Video View Rate	1,004,741	17%	100	1,180,909	12%	68	1,075,813	15%	91	1,081,942	14%	83
95% Completions & VCR	37,109	3.7%	185	27,988	2.4%	119	45,292	4.2%	211	14,527	1.3%	67
Link Clicks & CTR	20,602	0.35%	134	22,335	0.22%	85	32,182	0.46%	178	22,096	0.29%	110
Total Engagements	5,380	5.35	89	3,226	2.73	46	5,625	5.23	87	3,598	3.33	55
Shares	397	0.40	79	334	0.28	57	557	0.52	104	364	0.34	67
Saves	228	0.23	76	144	0.12	41	280	0.26	87	136	0.13	42
Comments	117	0.12	58	76	0.07	33	92	0.09	43	124	0.11	57
Reactions	4,638	4.62	92	2,671	2.26	45	4,696	4.37	87	2,974	2.75	55

Source: Facebook Ads Manager. All metrics are based on the standard 100% completion of video. Performance index is calculated as the ratio of the metric value to the baseline value (100). The baseline value is the average of the metric value for all videos in the campaign.

Source: Facebook Ads Manager. All metrics are based on the standard 100% completion of video. Performance index is calculated as the ratio of the metric value to the baseline value (100). The baseline value is the average of the metric value for all videos in the campaign.



Discovery Channel + Lunazul Tequila

ADDED VALUE VIDEO POSTS BY EXPEDITION UNKNOWN

Heritage



[Preview](#)

Harvest



[Preview](#)

Distill



[Preview](#)

Celebrate



[Preview](#)

Discovery Channel + Lunazul Tequila

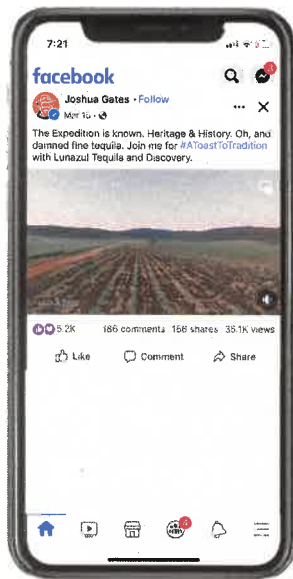
	HERITAGE (3/23)		HARVEST (3/30)		DISTILL (4/7)		CELEBRATE (4/14)	
Metric	Amount	Rate/Score	Amount	Rate/Score	Amount	Rate/Score	Amount	Rate/Score
Post Impressions	31,548	-	17,256	-	21,146	-	14,780	-
Unique Reach & Freq	30,007	1.1x	16,220	1.1x	19,370	1.1x	13,974	1.1x
Video View Rate	12,154	39%	4,029	23%	5,771	27%	3,867	26%
95% Completions & VCR	939	7.7%	276	6.9%	497	8.6%	154	3.9%
Link Clicks & CTR	190	0.60%	47	0.27%	52	0.25%	33	0.22%
Total Engagements	1,511	124.32	456	113.18	763	132.21	404	104.47
Shares	76	6.25	21	5.21	39	6.76	16	4.14
Comments	50	4.11	26	6.45	33	5.72	20	5.17
Reactions	1,385	113.95	409	101.51	691	119.74	368	95.16



Discovery Channel + Lunazul Tequila

VIDEO POSTS BY JOSH GATES

Heritage



Facebook [Preview](#)

Views: 35,000
Reactions: 5,228
Comments: 186
Shares: 156



Instagram [Preview](#)

Views: 27,519
Likes: 6,273
Comments: 123



Twitter [Preview](#)

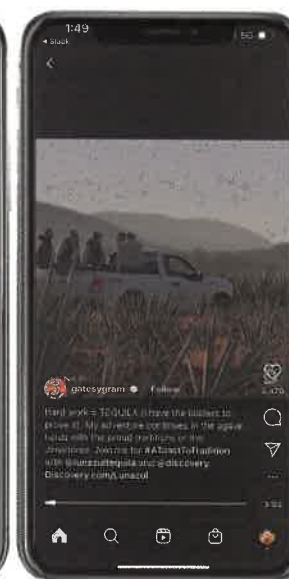
Views: 12,600
Likes: 773
Replies: 27
Retweets: 49

Harvest



Facebook [Preview](#)

Views: 21,000
Reactions: 3,030
Comments: 113
Shares: 92



Instagram [Preview](#)

Views: 16,123
Likes: 3,499
Comments: 38



Twitter [Preview](#)

Views: 10,900
Likes: 639
Replies: 25
Retweets: 28



Discovery Channel + Lunazul Tequila

VIDEO POSTS BY JOSH GATES

[Additional Detailed Metrics](#)

Distill



Facebook [Preview](#)

Views: 46,000
Reactions: 5,683
Comments: 188
Shares: 268



Instagram [Preview](#)

Views: 22,457
Likes: 4,511
Comments: 64



Twitter [Preview](#)

Views: 11,000
Likes: 723
Replies: 28
Retweets: 43

Celebrate



Facebook [Preview](#)

Views: 25,000
Reactions: 2,632
Comments: 66
Shares: 96



Instagram [Preview](#)

Likes: 3,461



Twitter [Preview](#)

Views: 8,738
Likes: 466
Replies: 18
Retweets: 29



Discovery Channel + Lunazul Tequila

HERITAGE & HARVEST: INSTAGRAM STORY AD PERFORMANCE

| [Watch Here](#)

METRIC	AMOUNT	RATE	PERFORMANCE INDEX
Ad Impressions	2,793,997	-	-
Unique Reach	1,126,102	2.5x	-
Swipe Ups & CTR	1,682	0.06%	50
Frame 1	1,001	-	-
Frame 2	338	-	-
Frame 3	343	-	-



Source: Facebook Ads Manager. Data current as of May 3, 2022.

Discovery Channel + Lunazul Tequila

DISTILL & CELEBRATE: INSTAGRAM STORY AD PERFORMANCE

[| Watch Here](#)

METRIC	AMOUNT	RATE	PERFORMANCE INDEX
Ad Impressions	2,604,102	-	-
Unique Reach	1,437,679	1.8x	-
Swipe Ups & CTR	1,751	0.07%	58
Frame 1	1,045	-	-
Frame 2	351	-	-
Frame 3	355	-	-



Report generated by: [redacted] | Date: [redacted]

Social Videos & Instagram Stories

HOW TO READ THE PERFORMANCE INDEX

The previous slides provided insight into how your sponsored content performed against the benchmarks for other Discovery Channel sponsored social content.

Various metrics will be listed along with their respective performance index. The **performance index baseline is 100, with anything above 100 indicating better than average performance and vice versa**. Note that a performance index of 80-99, while below average, is still considered positive overall.

Using the chart to the right as an example, **if the engagement score of a video was 10 and the benchmark was also 10, that video would receive a performance index of 100**, meaning that viewers were just as likely to engage with the content as other Discovery Channel sponsored content of the same type.

Conversely, **if the engagement score of a video was 15 (with the benchmark still at 10), the performance index would then equal 150**, meaning that viewers were 50% more likely to engage with the content compared to other Discovery Channel sponsored content of the same type.

150



Viewers were **50% more likely** to engage compared to other sponsored social videos of the same type.

100



Viewers were **just as likely** to engage compared to other sponsored social videos of the same type.

75



Viewers were **25% less likely** to engage compared to other sponsored social videos of the same type.

Social Flat Posts, Social Videos + Instagram Stories

METRIC DEFINITIONS AND METHODOLOGIES

METRIC	DEFINITION
Impressions	Number of times the post was seen. These are not unique impressions and may include multiple impressions per user.
Reach	Number of unique users who saw the post.
Video Views	Number of times the video was viewed for 3 seconds or longer. These are not unique video views and may include multiple views per user.
:03 View-Through Rate	VTR. A calculation of the number of :03 video views divided by post impressions.
Video Completion Rate	VCR. 95% video completion rate. The percentage of :03 video views that converted to 95% video views.
Engagements	Total number of shares, saves/re-pins, comments, reactions/likes, and/or close-ups.
Engagement Score	The number of engagements divided by impressions (for flat posts) or by video views (for video).
Shares	Total number of post shares. This includes public and private shares. Only available on Facebook, and Instagram (paid only).
Share Score	The number of shares divided by impressions (for flat posts) or by video views (for video).
Saves	Total number of post saves. On Facebook and Instagram, these are private saves to your account. On Facebook, only available for paid.
Save Score	The number of saves divided by impressions (for flat posts) or by video views (for video).
Comments	Total number of post comments. All are public comments on posts.
Comment Score	The number of comments divided by impressions (for flat posts) or by video views (for video).
Reactions / Likes	Total number of post reactions/likes. All are public reactions/likes on posts.
Reaction Score	The number of reactions/likes divided by impressions (for flat posts) or by video views (for video).
Link Clicks / Swipe-Ups	Total number of link clicks on the post or swipe-up in the story.
Link CTR / Swipe-Up Rate	The number of link clicks/swipe-ups divided by post/story impressions.



**LIMITED COMMERCIAL
INTERRUPTION SCREENSHOTS**

Discovery Channel + Lunazul Tequila

LIMITED COMMERCIAL INTERRUPTION SPONSORSHIP

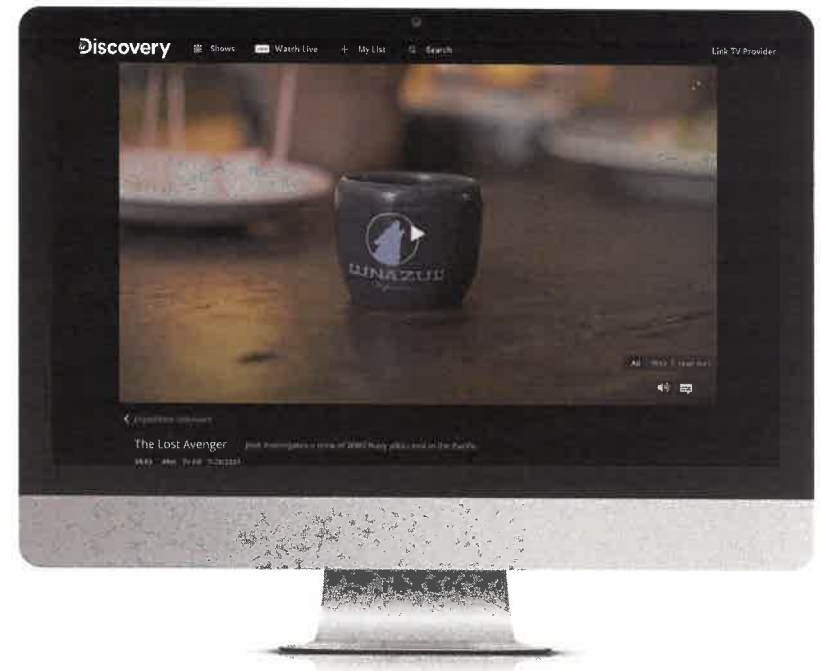


Placement: Limited Commercial Interruption Lime Light Sponsorship of Expedition Unknown – Key Art Logo



Discovery Channel + Lunazul Tequila

LIMITED COMMERCIAL INTERRUPTION SPONSORSHIP



Placement: Limited Commercial Interruption Lime Light Sponsorship of Expedition Unknown – :12 Custom Open (Pre-roll)



Discovery Channel + Lunazul Tequila

LIMITED COMMERCIAL INTERRUPTION SPONSORSHIP



Placement: Limited Commercial Interruption Lime Light Sponsorship of Expedition Unknown – :30 TVE Cutdown #1 (Pod 1)



Discovery Channel + Lunazul Tequila

LIMITED COMMERCIAL INTERRUPTION SPONSORSHIP



Placement: Limited Commercial Interruption Lime Light Sponsorship of Expedition Unknown – :30 TVE Cutdown #2 (Pod 2)



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Placement: Limited Commercial Interruption Lime Light Sponsorship of Expedition Unknown – :30 TVE Cutdown #3 (Pod 3)



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Placement: Limited Commercial Interruption Lime Light Sponsorship of Expedition Unknown – :30 TVE Cutdown #4 (Pod 4)



Discovery Channel + Lunazul Tequila

LIMITED COMMERCIAL INTERRUPTION SPONSORSHIP



Placement: Limited Commercial Interruption Lime Light Sponsorship of Expedition Unknown – :30 Brand Spot (Pod 5)





Lunazul Tequila 2020-2021





SUMMARY

STRATEGY

CREATIVE EXECUTION

Q4 MEDIA PLAN (to review 12/15)

- Media and tactics

FY'22 PLANNING (initial conversation)

ADDENDUM

- Why FTW / Datapoints
- FY ' 21 Survey Results (summary)
- Approved Q3 Media plan and creative

Summary

Quick Review of Survey

What We've Learned

Insights:

- Premium is brought to life through taste and experience
- Consumer and Manufacturers have different definitions of premium
- Younger consumer view the FTW campaign as Premium

Takeaways:

- Maintain Authenticity
- Personalize Marketing By Demographic Distinctions
- Lean into the experience of drinking Lunazul

What this could mean for future creative: Leave it be

Taking in the consideration how “Premium” conjures broad interpretation, the creative, untouched and where it stands today - to our younger audience samples, signals a premium experience. Which is good news given the intention to raise the price.

FTW campaign's shelf life is healthy and confidently relevant as we push to a more premium space in the future.



Strategy

Updated FY21 Strategy

fy21 marketing direction

1

Increase awareness of Lunazul as an authentic 100% agave tequila through exciting new channels that distinguish the brand.

2

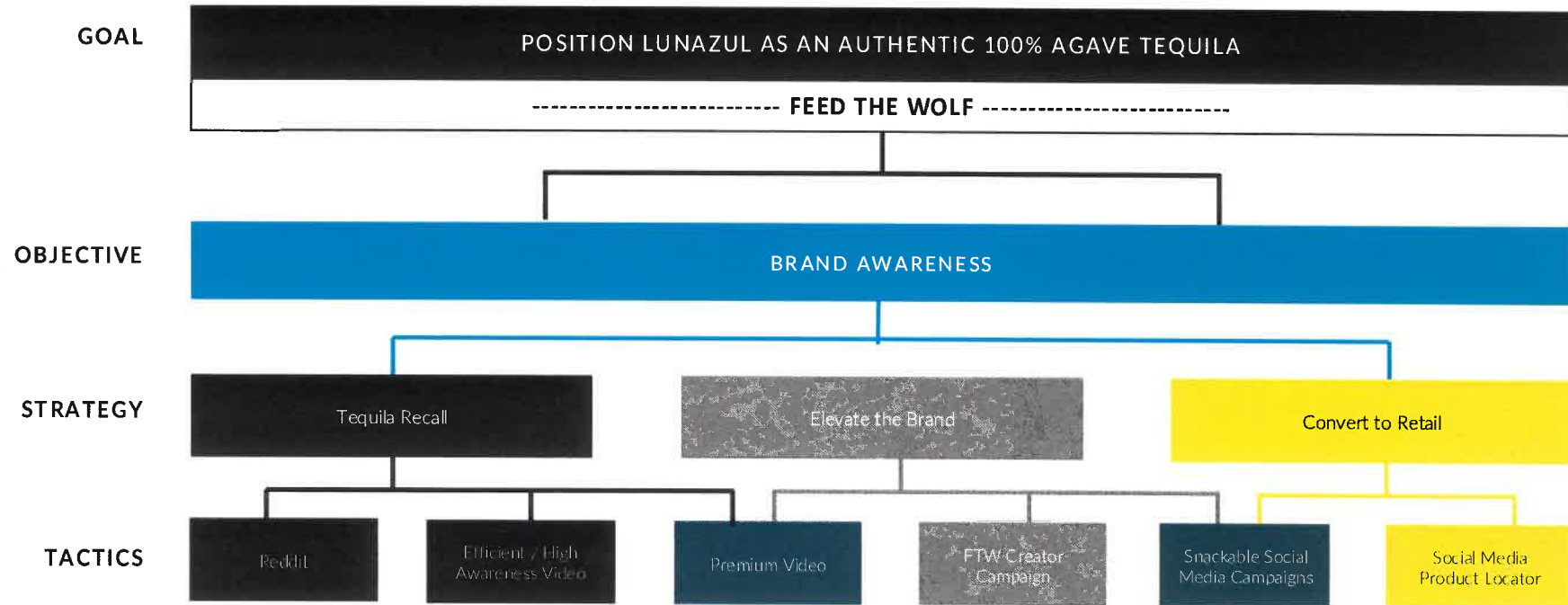
Elevate the brand as a leading tequila in the category.

3

Convert on-premise buyers to retail.



strategy matrix



Creative Execution

VIDEO CONCEPT OBJECTIVES:

- ▶ Launch a tequila brand
- ▶ Authenticity = Premium
- ▶ Primary audience (young) = energy and trend
- ▶ Secondary audience (older) = calmness
- ▶ Re-introduce lifestyle with Covid-19 in mind (1-3 people in frame)
- ▶ Connect tequila to the wolf (Feed The Wolf)

LUNAZUL TEQUILA LAUNCH
:30 VIDEO
"FTW MONTAGE"

This spot is effectively a re-introduction of our brand's essence, but with slight pivots learned from our research made.

It is a patchwork of lifestyles featuring our core audience, but in smaller groups and in separate experiences and environments. Lunazul Tequila and their lust for life are the ties that bind.



VO Talent: Hispanic Woman in her 50s.
 Sage-Like. Patiently delivering the lines.



Exploring the world starts within.



An adventurer, ignited with a spark
 That paws at your sense of wonder



and says, "Let's find out what's on the other side."



It's a hunger so satisfying,



a fire that burns, deep inside.



All you have to do?



Is feed it.



Feed The Wolf.

LUNAZUL TEQUILA LAUNCH
:30 VIDEO
"WOLF POUR"

This spot connects a wolf's pursuit in the wild with the process of opening, pouring and sharing a glass of Lunazul—a metaphor for the FTW campaign and the Lunazul experience.

The setting is uncharted, the energy is exciting, the cuts from scene to scene are palpable.

We build to unveil a couple - our target - at their current destination enjoying a finished pour, looking out to what's next on the horizon.



*VO Talent: Hispanic Woman in her 50s.
 Sage-Like. Patiently delivering the lines.*



You don't know where it came from.



*The need. The desire for more.
 But it's always lived within you...*



Hungry to explore,



Eager to join in the hunt.



under the same moon that



has always guided us.



Find it.



*VO: Feed the Wolf
 ONSCREEN: Couple looking to the horizon.
 FTW*

Media Plan

campaign timeline

PHASE 1
PRE-LAUNCH
(DEC - JAN 15)

Reddit

Social Media Product Locator

Social Media Product
Locator

PHASE 2:
CAMPAIGN LAUNCH
(JAN 15-APR)

Video

Premium Video

Creator Campaign

Creator Campaign

Connect the Wolf

Connect the Wolf

Social Media Campaigns

Social Media Campaign
Support

NOV

DEC

JAN

FEB

MAR

APR

MAY

...

Q4 Media budget overview

Channel	objective	Primary KPI	budget	Rate	Est. Results
Video Campaign – 42%					
Premium Video: Hulu	Awareness & Elevate	CVR	\$150,000	\$54.00	2,777,778 Imp.
Premium Video: CTV	Awareness & Elevate	CVR	\$150,000	\$28.00	5,357,143 Imp.
High-Efficiency Video: Social (IG, FB, TW)	Awareness	CVR	\$50,000	\$3.75	13,333,333 Imp.
Creator Campaign – 41%					
Creator Contracts	Awareness & Elevate	CPM, Eng. Rate	\$300,000	FLAT	TBD
Creator Amplification: Social (IG, YT)	Awareness & Elevate	CPM, Ad Recall	\$30,000	\$3.75	8,000,000 Imp.
Creator Amplification – Sweepstakes: Social (IG, FB, TW)	Elevate & Engage	Eng. Rate	\$16,500	\$1.42	11,620 Clicks
Connect the Wolf – 6%					
Video Build with Discovery or Creator Build	Awareness	CPM	\$50,000	FLAT	TBD
Social Media Amplification – 11%					
Primero (IG, FB, TW)	Awareness	CPM, Ad Recall	\$30,000	\$3.75	8,000,000 Imp.
Recipe Videos (IG, FB, TW)	Elevate & Engage	Eng. Rate	\$30,000	\$3.75	8,000,000 Imp.
Tequila Trends (IG, FB, TW)	Awareness & Engage	CPM, Ad Recall	\$10,000	\$3.75	2,666,667 Imp.
Product Locator (IG, FB)	Convert	CTR	\$20,000	\$1.42	14,085 Clicks
Totals					
			\$836,500		48,134,921+ Imp.

LUNAZUL
Tequila

video



Video strategy

Capture the audience's attention through strategic video placements that will increase awareness, elevate brand perception, and drive consumers to the website.

premium video

Premium placements for premium tequila

- Less clutter means more memorable ads
- 100% viewable, non-skippable inventory
- Brand-safe environment



Connected tv

High-efficiency video

Reach and engage the audience

- Most targeted type of video placements
- Align with premium content and creators
- Opportunity to engage consumers



Social

PREMIUM VIDEO



Premium video

hulu

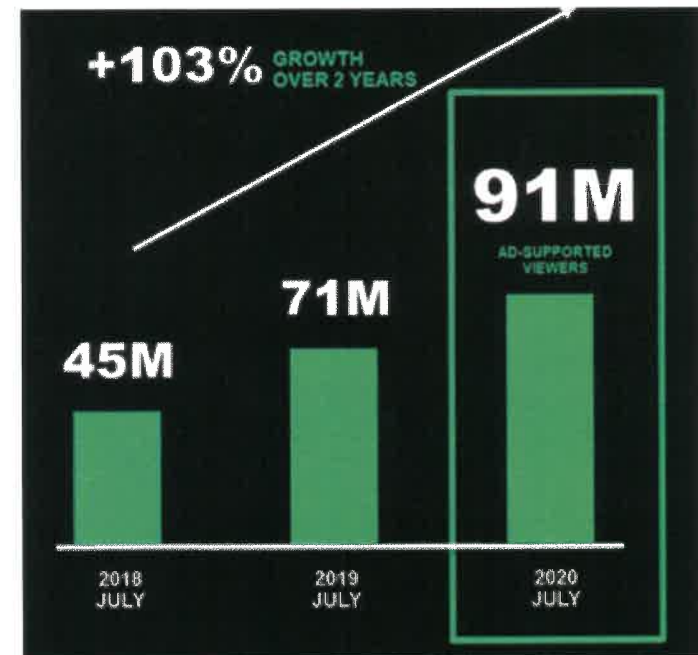
Benefits:

Hulu is the leading platform in streaming TV.

In July of 2020, Hulu hit 91 million ad-supported viewers.

Of the big 5 Networks, Hulu is #1 with 733M+ house watched. Hulu is #1 in OTT hours per household, with 43 hours of content a month.

Hulu's exclusive reach continues to increase, reaching 62% in 2019.



Premium video



Connected tv

A subset of OTT which is always delivered on an actual television set, usually through a streaming device.

Benefits:

100% viewable premium inventory

98%+ non-skippable inventory

Less cluttered ad environment with maximum commercial length of 90 seconds (vs. 150 seconds on traditional TV)



Premium video



Connected tv



User logs on to device
and selects the content
they would like to
watch



A non-skippable video
advertisement plays
prior to content
beginning or mid-
content



Once ad(s) is complete,
selected content begins
or resumes

Premium video



Connected tv – Where do consumer watch?

Scripps – Lifestyle

Run of Network across Sling TV's in-app video inventory targeting only Scripps TV along the lifestyle vertical.



Telaria – Food & Drink

Run of network across Telaria's food and drink related CTV only inventory + Brightline – TV technology for dynamic, personalized and interactive ads



Sling TV – Entertainment

Run of Network across Sling TV's in-app video inventory targeting Entertainment.



SpotX – Live Sports

Run of site across all live sport content on Spot X inventory – SpotX is still working with their publishers to create the 2021 Events Calendar



Tubi TV – LDA Compliant

Run of Site across Tubi TV's connected TV inventory targeting LDA Compliant.



ROKU – RON

Run of exchange across Rubicon Project's network of CTV partners running across Roku devices.



Premium video

BrightLine



Connected tv – elevating the brand with QR codes



Allows the viewer to click for additional advertiser information, app download, or exclusive offer.

Utilize a QR code to drive to recipes on the site or to the Drizly app to purchase Lunazul

HIGH-EFFICIENCY VIDEO



High-Efficiency Video



Social

Support the campaign relaunch by amplifying the Feed the Wolf campaign on Lunazul's owned social channels — efficiently increasing reach and recall on placements that are endemic to the campaign.

Demographic: 21-39

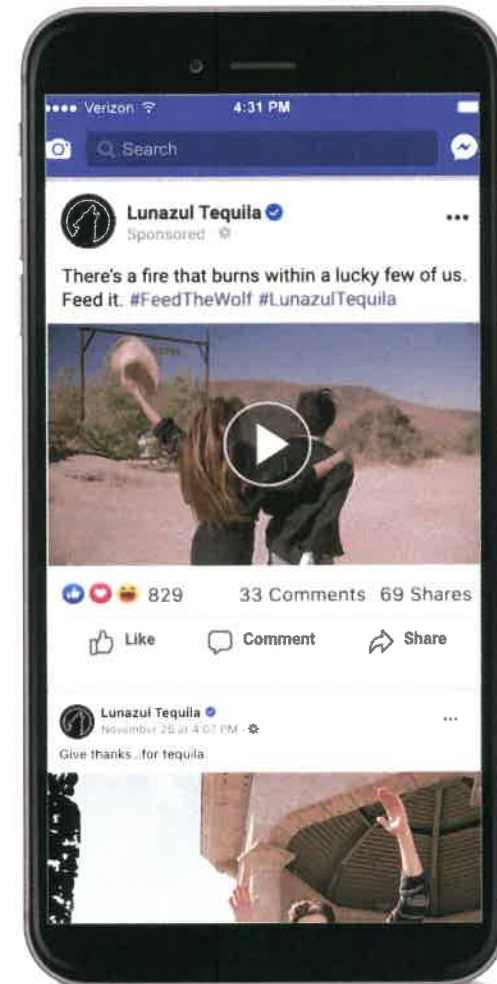
Lookalike Audiences – Engaged Users, Video Viewers, Website Visitors

Interests: el Jimador Tequila, Distilled beverage, Hornitos Tequila, Margarita, Agave, Tequila, Espolòn Tequila, 1800 Tequila or Tequila Cazadores

And Must Also Match: Interests: Mexico, Mexican cuisine, Concerts, Music, Music festivals, Parties, Bars, Taco, Dancehalls, Restaurants, Happy hour or Foodie

And Must Also Match: Interests: Adventure travel, Vacations, Mountains, Air travel, Camping, Nature, Lakes, Tourism, Beaches or Hotels

And Must Also Match: Interests: Family or Friendship



Connecting the wolf



DISCOVERY

Option 1



Re-edit the Discovery Mexico video to create a Facebook & Instagram ad targeted to:

- Foodies
- Travelers
- Discovery audience

Increase reach and frequency with the discovery audience by supplementing with:

- Display media
- Food Network Recipe of the Day Newsletter sponsorship.

DISCOVERY

Option 2



Build on the Premium Video campaign, with a direct buy to feature a :30-:60 video in premium mid-roll across the Discovery/Food Networks streaming apps.

NOTE: Discovery can create a cutdown of the existing custom video to be used as an additional / supportive TVE asset to further connect the campaign to the wolf.



DISCOVERY

Option 2

TV Everywhere offers full-length episodes of Discovery's premium linear content, available to traditional and digital cable subscribers across connected devices—such as connected TVs (80% of inventory)—mobile, tablet and desktop.

Extend across all platforms of Discovery GO:

- vMVPD and VOD inventory
- across networks such as HGTV, TLC, ID, OWN, Discovery Channel
- with access and placement targeting on more than 30,000 titles

Increase relevancy by scrubbing closed captioning data to extract all parts of speech and multi-word expressions to provide contextual alignment on an episodic level.

- Keywords could include cocktails, travel, cooking and more.



LUNAZUL
Tequila

creators



Meet the FIRE

THERE'S A FIRE
THAT BURNS INSIDE THE
LUCKY FEW OF US.
FEED IT.

CREATE IT!

@vagabrothers



@elayna.carausu



@lacoquette

CREATOR SELECTION STRATEGY

We're *on the hunt* for adventurous story tellers that have a unique point of view to their active and ambitious lifestyles.

Adventurer



Adventure
With Cocktails



Food Focused
Adventure



Adventure
In a Van/RV



Sail to the
Adventure



Adventure
Through
Photography



Adventuring
Together



Adventure
With Wolves



Bucket List
Adventures

CREATOR SELECTION STRATEGY

Does the creator ...

- 1 Possess a hunger for life which can be seen through unique story telling?
- 2 Have an active communities of friends & family featured in their content and an engaged followers to authentically build Lunazul's wolf pack?
- 3 Create high-quality, top-tier content that will help to elevate the brand?

Tier 1

SAMPLE TALENT



1M



157K

vagabrothers



Brothers Alex and Marko have travelled the world, documenting their adventures from Hong Kong to Laos to Uzbekistan. In each destination, they love sharing their wild activities, from hiking Mount Kilimanjaro to going on safari in Tanzania.

[Content Example](#)



1.5M



414K

Sailing la vagabond



Riley and Elayna are a couple that is currently sailing around the world in their 43 foot yacht. They've crossed the Panama Canal, sailed across the Atlantic with Greta Thunberg, and share every moment of their life with their fans.

[Content Example](#)

SAMPLE TALENT



4.1M



5.1M

Topsy Bartender



Whether you are looking for an epic jungle juice for your next party or a tasty new mimosa to brighten up brunch - The Topsy Bartender has got you covered. With recipes ranging from creative jello shots to spiked desserts he truly can do it all.



17.6K



2.3M

Tieghan Gerard



NYT best selling author of HBH Super Simple Cookbook, Tieghan's recipes are inspired by the people and places she loves. From a family of nine, she helped cook to tame some of our mealtime chaos. As she captured the process in photos and documented her best recipes, Half Baked Harvest was born.

Tier 2

SAMPLE TALENT



▶ 321K
📷 139K
🎵 248K

SASHA JULIARD



Sasha is an adventurer and travel photographer known for his stunning photos and videos of his adventures around the world. He's always on the move, seeking out the world's most beautiful places.

[Content Example](#)



▶ 445K
📷 57K

the endless adventure



Eric and Allison are a travel couple on a journey to find the most interesting places and unique foods this planet has to offer! They traded in steady paychecks and permanent home for a life of travel and adventure.

[Content Example](#)

SAMPLE TALENT



38K

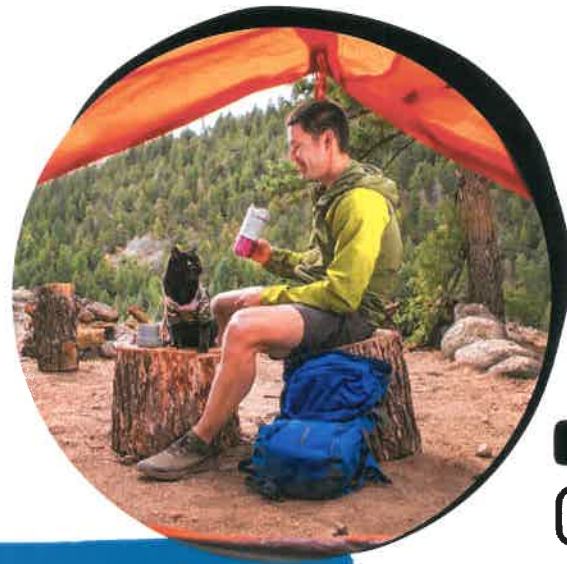


546K

The blonde abroad



Kiki is a California native, who left her career in corporate finance to pursue her dream of traveling the world. Since then, she's traveled to over 70 countries and has knocked some big adventures off her bucket list. Kiki established her blog, The Blonde Abroad when she stopped living a life bound by limitations and decided to follow her heart and live a life without borders.



1.5M



414K

JJ YOSH



In his early adulthood, JJ discovered an undeniable love for nature on his first backpacking trip, and quickly realized that exploring our earth was key to helping the world. Since then, JJ has led countless groups of people all over the world to explore some of the most beautiful places on earth and now he produces engaging media to inspire people to get outside and explore their backyards.

SAMPLE TALENT



▶ 10K*

📷 68K

La Cooquette



Maria was born in Honduras but considers herself as a citizen of the world. She is a traveling foodie, living her best life exploring the globe through taste. Her one-of-a-kind recipes are inspired by many different dishes from around the world. Having lived in multiple cities and traveled to many countries, Maria aspires to share simple recipes that will allow her audience to be adventurous with their approach to food.



▶ 202K

📷 336K

Matt Broussard



Recently named Forbes 30 under 30, Matt is a professional chef and internet personality who shares droolworthy recipes from around the world on his social pages. He also is a huge cocktail lover, and shares tips for making killer drinks on his handles.

SAMPLE TALENT



434K

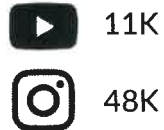
Monique Volz



Monique is a loving mother and wife that has a passion for all things cooking and baking. Her goal is simple: to inspire her followers in and outside of the kitchen. Monique's passion for cooking and baking came at an early age while assisting her Puerto Rican mama in the kitchen. Now, Monique has grown her brand, Ambitious Kitchen to help inspire and educate her followers on how to keep things in the kitchen exciting, yet balanced.

Tier 3

SAMPLE TALENT

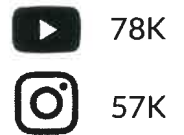


Nic Morley



Nic is an adventure filmmaker whose content features adrenaline pumping activities such as: backflipping off shipwrecks, dirt biking on the beach, and a range of exploration travel videos

Content Example



Chase for adventure



These travel journalists and couple look to showcase the beauty in different cultures and inspire others to chase their dreams. They love sampling new flavors, and could share what pairs best with Lunazul tequila!

Content Example

SAMPLE TALENT



69.1K



116K

Tyler and Todd



Last year, Tyler and Todd left everything behind, bought a 1996 RV, made it their home and ventured out to explore North America as digital nomads. With their two dogs, Tyler and Todd have been traveling and living in their RV since September 2019. Between renovating their home on wheels and sharing their love for nature, they have garnered a large and loyal following with a consistent engagement rate of 11% across social media!



1.3K



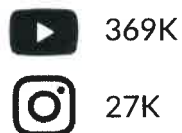
44K

Hannah Chamberlain



Well-versed in original cocktails, alcohol culture, and top drinking destinations, Hannah is the go-to millennial mixologist on the internet. Plus, she is always serving up drinks with her unique flair.

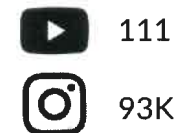
SAMPLE TALENT



Saeed



Cocktails are Saeed's signature specialty, with 7 years of bartending experience under his belt he knows how to shake (or stir) the best cocktails around! But cocktails aren't his only signature, it wouldn't be Cocktails wit Hawk without his Mohawk!



Natalie Migliarini



Based out of Seattle, WA., Natalie Migliarini is a home bartender, cocktail stylist, photographer, and recipe developer. She creates and photographs original cocktail recipes from the perspective of a home bartender. In 2013, Natalie decided to leave her career job and chase her passion for cocktails and entertaining. She's passionate about crafting yummy drinks and sharing her journey with others through her drinkable moments around the world.

SAMPLE TALENT



Esteban Castillo



65K



Yvette Marquez-Sharpnack



15.5K



48K



Esteban says Mexican food was the foundation of his childhood. So when he started to see popular food blogs present recipes as traditional Mexican dishes when they were anything but, it got him riled up — and motivated him to mesh his love for design, cooking and culture. Chicano Eats is a bicultural and bilingual food blog where Esteban shares traditional and fusion Mexican recipes — presented with a stunning visual sensibility.



Among many things, Yvette is a proud Latina and an on-camera host, a home chef, an Emmy-winning producer and writer, award-winning food blogger, and author. Yvette founded Muy Bueno to share delicious home-style Mexican recipes served with a heaping spoonful of heartwarming family stories.

BUDGET: \$300k

Example 1

talent: 5 creators

- 1 x tier 1 creator **and**
- 2 x tier 2 creators **and**
- 2 x tier 3 creators

talent to capture (each)

- 1 x igtv teaser video
- 2 x custom youtube video
- 2 x instagram stories
- 1 x instagram photo

Example 2

talent: 4 creators

- 1 x tier 1 creator **and**
- 3 x tier 2 creators

talent to capture (each)

- 1 x igtv teaser video
- 2 x custom youtube video
- 2 x instagram stories
- 1 x instagram photo

example 3

talent: 2 creators

- 2 x tier 1 creators

talent to capture (each)

- 1 x igtv teaser video
- 2 x custom youtube video
- 2 x instagram stories
- 1 x instagram photo

PROCESS + TIMELINE

1

December 30, 2020

**Campaign
Approval**

Align on creator campaign, including budget and sample influencers.

2

January 8, 2021

**Complete
Campaign &
Creative Brief for
Creators**

LEAP to develop a campaign & creative brief to be shared with creators. It will include content requirements, such as required links & campaign hashtags, as well as a proposal to develop a long-term relationship.

3

January 22, 2021

**Identify and Contact
Creators**

Based on approved sample influencers, LEAP to connect and negotiate with creators for the campaign. LEAP will provide real-time creator updates with the goal of quickly building a final list of creators.

4

February 12, 2021

**Develop Seeding Kit
& Send to Creators**

Work with creators to ideate, and then develop and source seeding kit and its contents.

5

February 26, 2021

**Creator Content
Development**

Once creators receive seeding kit, they will create content. Brand team will have final approval of content before campaign launch.

6

March 2, 2021

**Creator Campaign
Launch**

Creators publish content, and LEAP to amplify with approved media support.

Connecting the wolf



PARTNER WITH WOLVES



Bring awareness to wolf conservation through the eyes of *the wolf* by partnering with:

- Wolfdog influencers and their humans that share their adventures.
- Wildlife photographers that often work with and document wolves.

Work collaboratively with creators to generate content about how Lunazul inspires them to fuel their passion in support of wolves. Posts can be purposefully crafted on designated days or weeks throughout 2021 to raise awareness and funds for select wildlife and conservation organizations. For example:

- Animal Rights Awareness Week (late-June)
- National Wildlife Day (Sep.)
- Wolf Awareness Week (late-Oct).

SAMPLE TALENT



11.7K



2M

Loki the wolfdog



Loki is a husky/arctic wolf/malamute mix traveling and exploring the western U.S. with his photographer owner, Kelly Lund.

Content Example



339K

Wolf Instinct



Njörd, a wolfdog, and his owner Jeremy Stella share their adventures and howls outdoors. While based in France, Njörd has a strong U.S. following.

Content Example

SAMPLE TALENT



533K

Sitka The Wolf



Sitka and his owner, Czech photographer Honza Řeháček, have been discovering the beauty of nature together for more than six years.

[Content Example](#)



210K

Wolfdog Archer & Gang



Wolfdog Archer and his pack – Sol, Luna, and their humans – share their life indoors and outdoors in California.

[Content Example](#)

SAMPLE TALENT



6.8M

Paul Nicklen



One of the world's most acclaimed nature photographers and NatGeo contributor, Paul Nicklen has documented the beauty and the plight of our planet for over twenty years.

[Content Example](#)



56.6K

Jennifer Ilene



An avid animal lover and advocate, Jennifer is an animal photographer that has worked with several wildlife educators & over 80+ different animal species, including wolves, throughout the US.

[Content Example](#)

LUNAZUL
Tequila

Social media



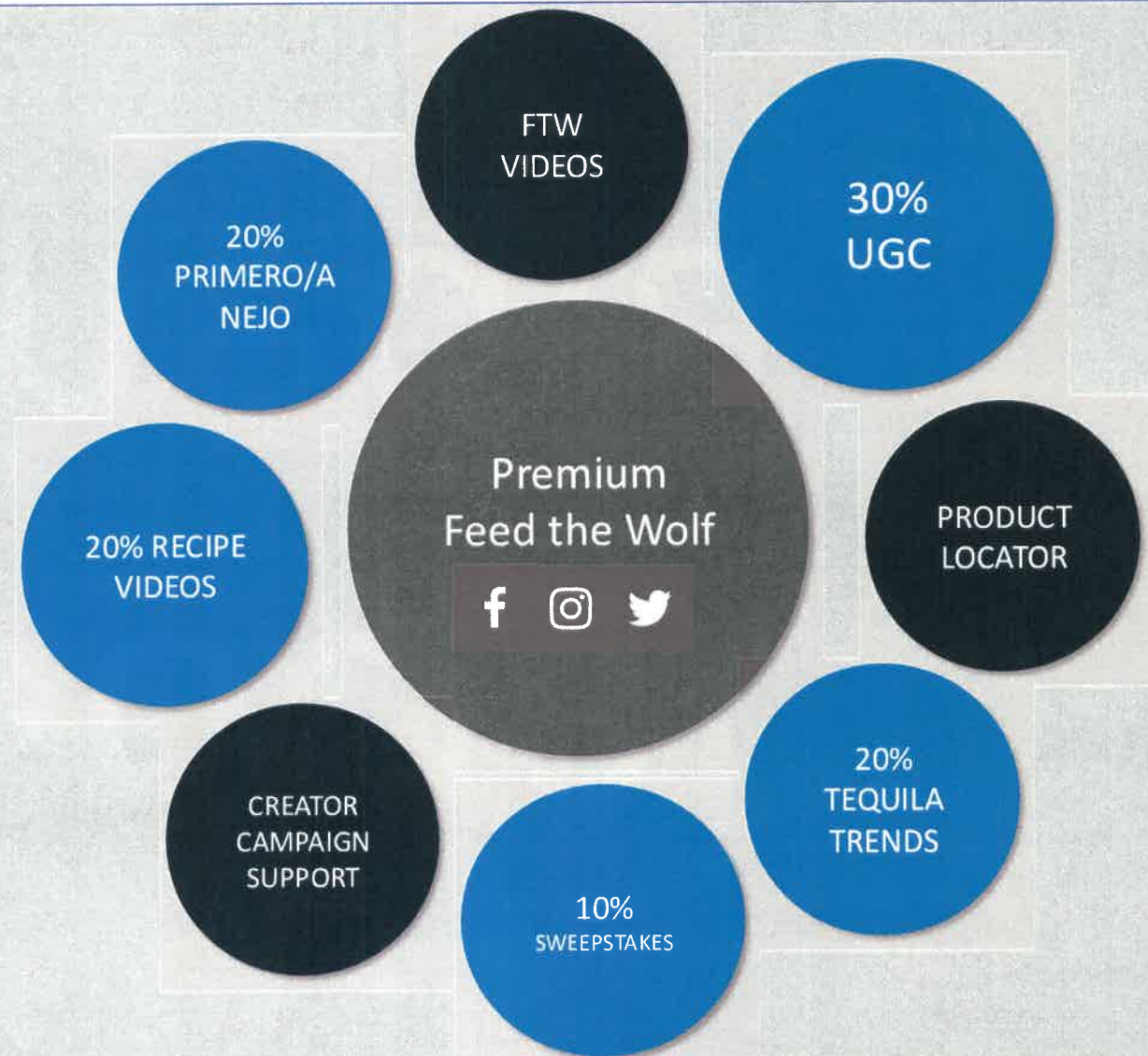
Social Media Conversation Opportunities

Amplify the Feed the Wolf campaign relaunch and highlight key brand messages through Lunazul's owned social media channels.

These snackable campaigns will resonate with consumers and drive brand engagement through relevant, premium content.

 On Feed Promotion

 Dark Ads



Social Media Conversation Opportunities

Continue to amplify Lunazul's high-quality user generated content by actively monitoring conversation and engaging with consumers.

- Weekly checks and recommendations to share UGC on feed
- Surprise & delight consumers by sending Lunazul swag



@willfrolicforfood The first rule of a hunt: never settle for anything but the best. It looks like you found the best. DM us so your pack can rep the wolf.

30%
USER
GENERATED
CONTENT

Social Media Conversation Opportunities

Pair up with chefs and bartenders to create a series of videos similar to the flambe video produced in early 2020.

- Create a mix food and cocktail recipes

Publish one video per month



20%
RECIPE VIDEO

Social Media Conversation Opportunities

Organize and execute a shoot day for Primero AND Anejo, capturing premium still and video content.

Publish 1-2 posts per month to drive product awareness.



20%
PRIMERO/ANEJ
O

Social Media Conversation Opportunities

Capitalize on holidays that connect Lunazul with trending tequila conversations to drive awareness. We'll develop a snackable social campaign for each of the following days:

- National Margarita Day | February 22, 2021
- Cinco de Mayo | May 5, 2021
- National Tequila Day | June 24th, 2021
- Blue Moon | August 22, 2021
- Wolf Awareness Week | October 18-22, 2021
- Dia de los Muertos | November 1st 2021
- Holiday | December 2021
- New Year's Day | January 2022



20% TEQUILA
TRENDS

Social Media Conversation Opportunities

Utilize Second Street's Text to Win platform to run a sweepstakes in cohesion with the Creator Campaign. To drive consumer engagement, we will give away one of the unique influencer seeding kits.



10%
SWEEPSTAKES

Looking ahead

campaign timeline fy'21

PHASE 1
PRE-LAUNCH
(DEC - JAN 15)

Reddit

Social Media Product Locator

Social Media Product
Locator

PHASE 2:
CAMPAIGN LAUNCH
(JAN 15-APR)

Video

Premium Video

Creator Campaign

Creator Campaign

Connect the Wolf

Connect the Wolf

Social Media Campaigns

Social Media Campaign
Support

NOV

DEC

JAN

FEB

MAR

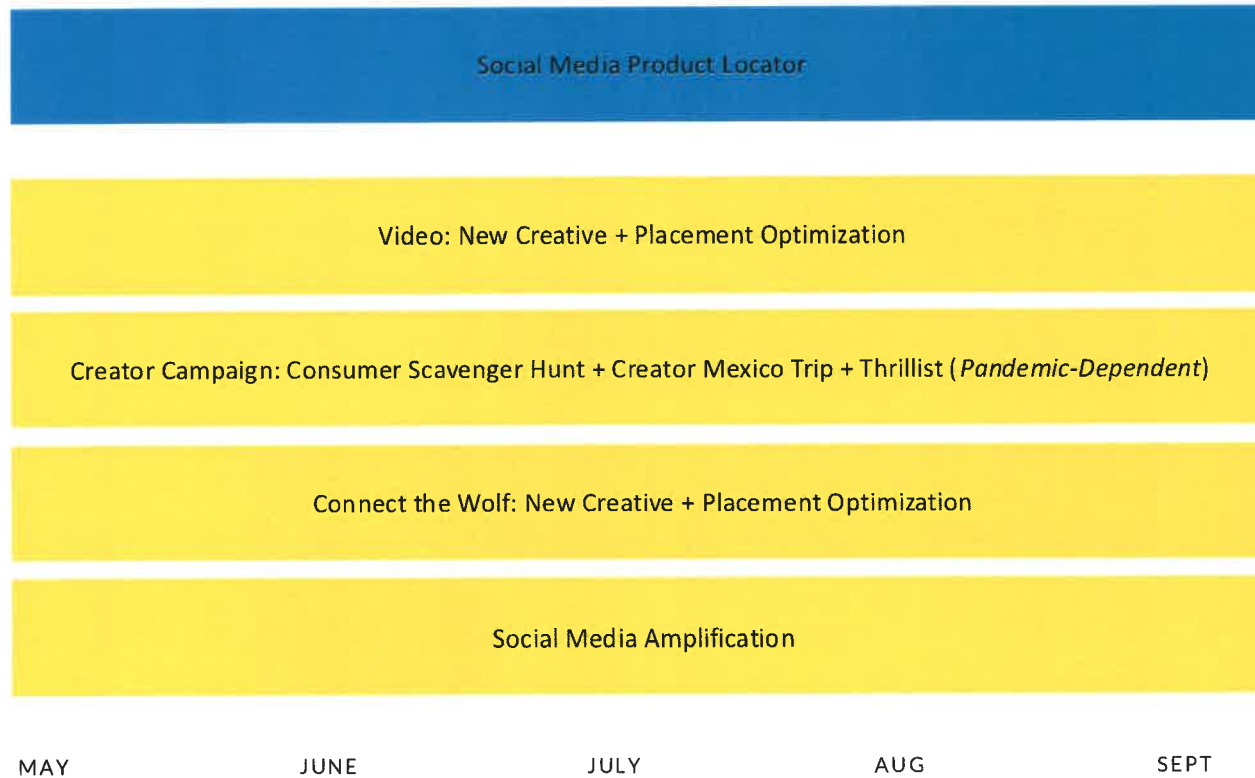
APR

MAY

...

Proposed timeline - FY ' 22

PHASE 3
SUMMER
PROGRAMMING
(May - September)



NEXT STEPS

- 

ADDENDUM

Q3 Media

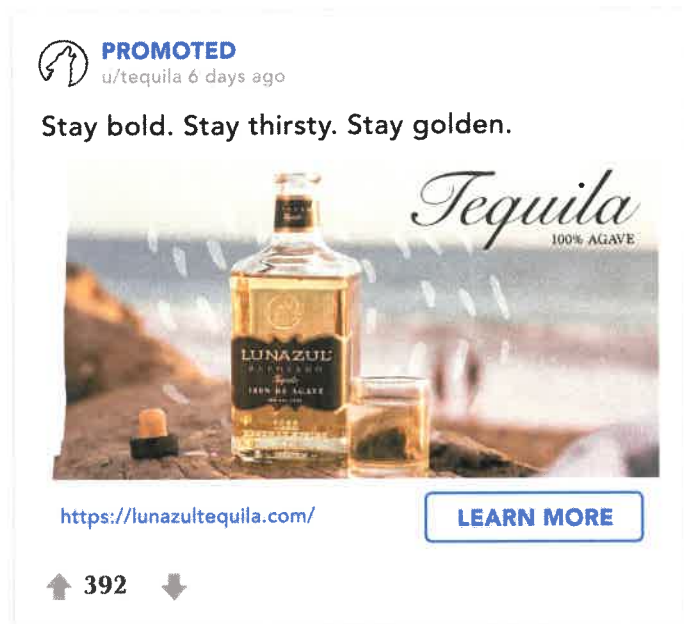


Q3 Media budget overview

channel	tactics	objective	Primary kpi	spend	Avg. rate	Est. results
Reddit	Interests & Communities	Awareness	CPM	\$25,000	\$2.64	9,469,696 Impressions
Facebook + Instagram Feed & Stories	Product Locator & Drizly Audiences	Traffic	CPC	\$5,000	\$1.42	3,521 Clicks
Totals						
Total FY21 Media Spend				\$30,000		

REDDIT

Increase awareness of Lunazul Tequila while users are engaged in relevant content and discussion.



Primary KPIs: CPM

Supporting KPIs: CTR, Engagement Rate

Targeting Tactics

- GEO: Top Markets
- Interests: Food & Drink > Alcoholic Beverages
- Communities: r/tequila, r/alcohol, r/cocktails, r/bartenders, r/mixology, r/drinking, r/drinkswithaview, r/alcoholgifrecipes, r/recipes, r/mexicanfood, r/tacos, etc.

Creative Assets

- A/B Test 2-3 Promoted Posts
 - Image + Copy
- 1 Promoted Videos
 - Video + Copy

Reddit Video Creative

GLAMPING VIDEO AUDIT:

Observations: Lean more lifestyle than bottle. Showcase fire in desert.



:15




:06


At Lunazul, we make 100% agave tequila hand-crafted for those with a hunger to explore, but we know times are tough for right now. We also know you're tougher, and when the time comes, you'll be ready to join the pack....And Lunazul? We'll be ready, too.

Reddit Still Creative

VERSION: A

 **PROMOTED**
u/tequila 6 days ago

Stay bold. Stay thirsty. Stay golden.




<https://lunazultequila.com/>


[LEARN MORE](#)

↑ 392 ↓

VERSION: B

 **PROMOTED**
u/tequila 6 days ago

Stay bold. Stay thirsty. Stay golden.




<https://lunazultequila.com/>

[LEARN MORE](#)


↑ 392 ↓

Reddit Still Creative

VERSION: A

 **PROMOTED**
u/tequila 6 days ago


Stay bold. Stay thirsty. Stay golden.



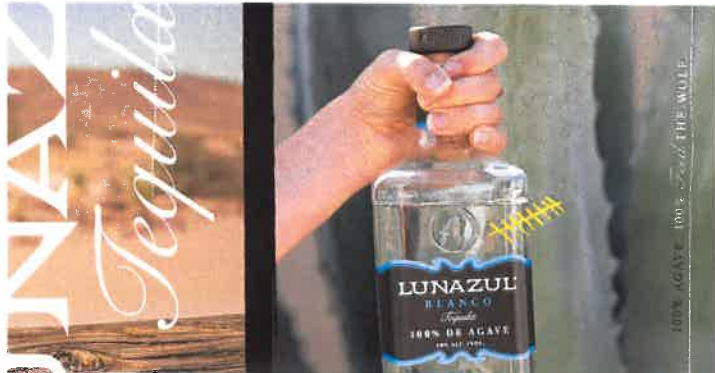
<https://lunazultequila.com/> [LEARN MORE](#)

↑ 392 ↓

VERSION: B

 **PROMOTED**
u/tequila 6 days ago

Stay bold. Stay thirsty. Stay golden.



<https://lunazultequila.com/> [LEARN MORE](#)

↑ 392 ↓

Facebook + Instagram

Increase product consideration by driving consumers to Lunazul's product locator and Drizly digital shelf.



Primary KPIs: CTR

Supporting KPIs: Clicks, Reach

Targeting Tactics

- GEO: Top Markets
- Age: 21+
- Lookalike: Engaged Users, Website Visitors
- Interests: Distilled Beverage, Tequila, Drizly
 - Exclude: Clean & Sober

Creative Assets

- 2x Feed Videos + Post Copy
 - 1x Product Locator
 - 1x Drizly
- 2x Story Videos + Post Copy
 - 1x Product Locator
 - 1x Drizly



AS THE BLUE MOON RISES over the mountains of Jalisco, Mexico,
we see the silhouette of a wolf howling to gather its pack.
The pack responds, eager to join in the celebration of something beautiful and rare.
It is that **PRIMAL** energy, that same hunger for life,
that gathers and excites Lunazul drinkers. *We are born under the moon of desire -*
in homage to the heart of the distiller, the rich
land of Tierra de Agaves, and the spirit of the wolf. Feed that spirit.

-- FEED THE WOLF --



1M+

SOCIAL ENGAGEMENTS

23M+

IMPRESSIONS

400%

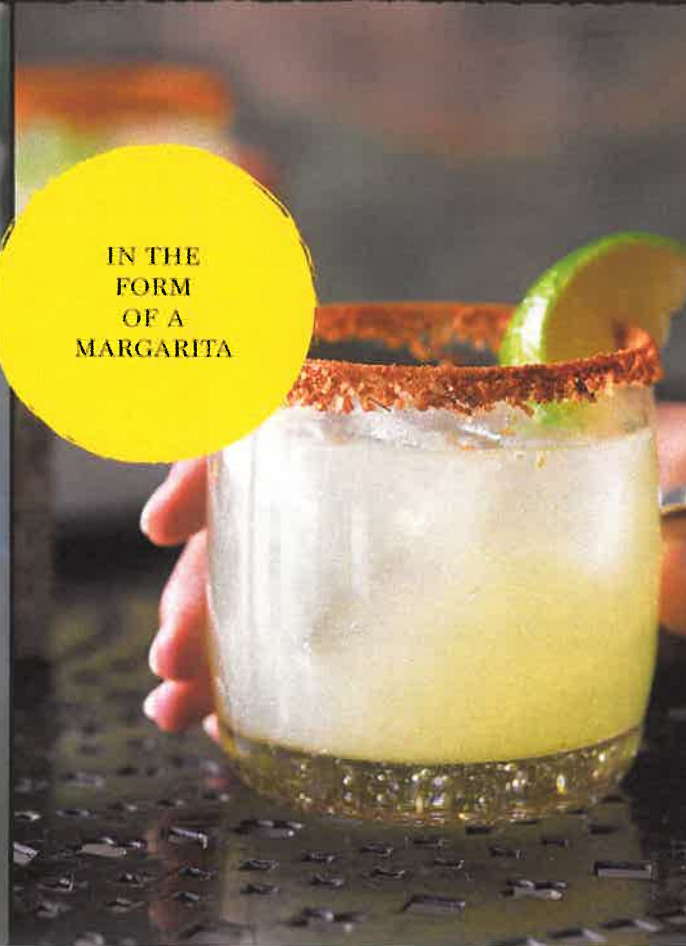
INCREASE IN SHARE OF VOICE

COMMUNICATING “TEQUILA” - *Lunazul is one of the best tequila’s on the market that no one knows about. In 2021 this will change.*



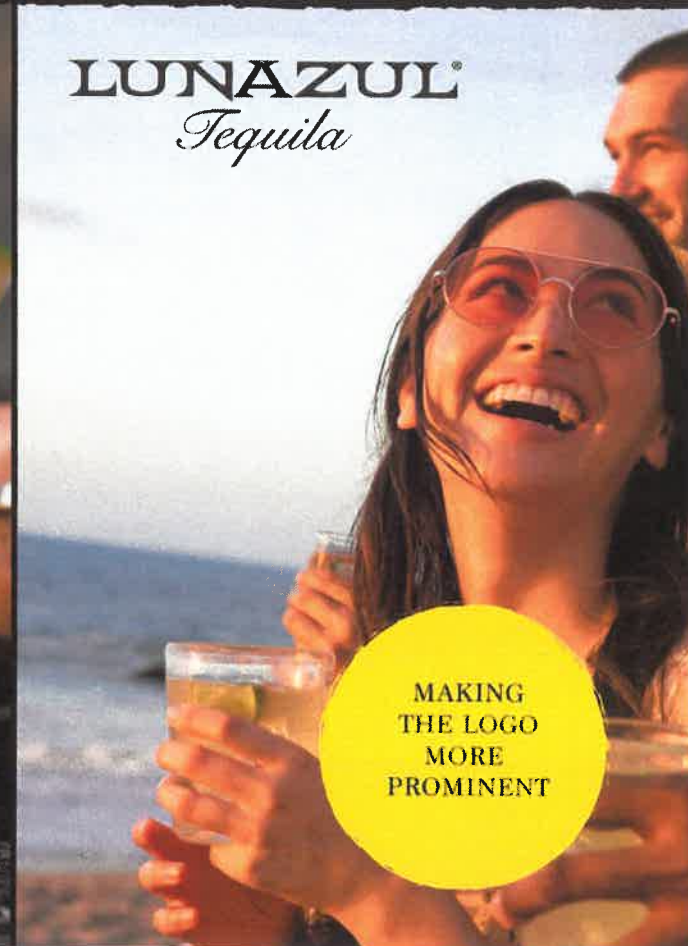
EASILY
SEEN
ON THE
LABEL

IN THE
FORM
OF A
MARGARITA



LUNAZUL®
Tequila

MAKING
THE LOGO
MORE
PROMINENT



BALANCING THE ELEMENTS:

Having a broad palette of assets is great for an expressive brand, but sometimes too much *personality* can turn into a exciteable mess. Here's some tips of how to keep everything meaningful.



The bottle, by very nature, has a big logo on it. When featuring it prominently the messaging demands of clearly indicating the word 'tequila' and owning the wolf icon are covered. This makes the balance of other brand mandatories much easier.



When you don't have a bottle to feature, adding a logo is necessary. Find an area in the photo that presents a high contrast bed for the logo to sit on.

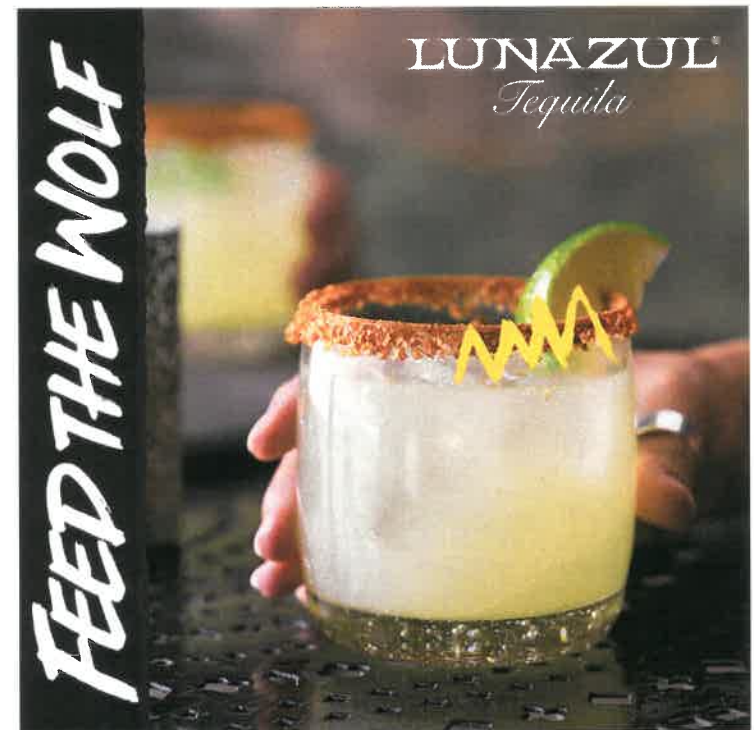


Other design tips to clean up the presentations include:

Use only one expression of the wolf spirit per design

Use distressed edge to divide visual thoughts

If communication demands stuck up choose an ultra-simple image to feature





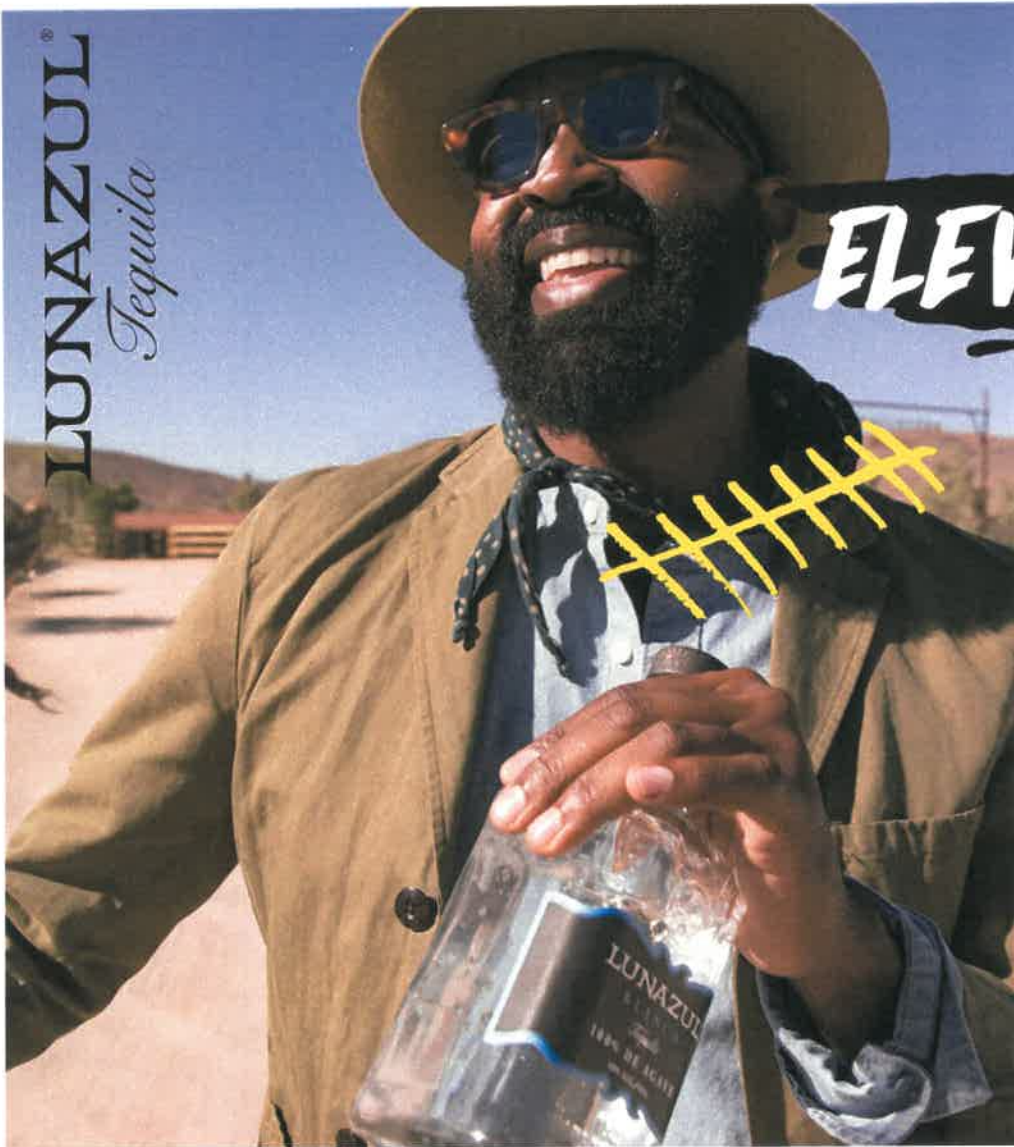
WHY THE WOLF?

Lunazul's core brand personality trait is derived from the strongest part of its brand, the packaging.

The authentication of the embossed wolf seal means everything; it echoes the meaning of Lunazul (blue moon,) it marks a standard for quality, and it connects us to the heritage of the brand as it harkens back to the land where the mexican wolves roam the foothills of Tequila Volcano amongst the agave plants.

By *elevating the wolf* we afford the brand a recognizeable signal and personality that pops up in a variety of ways throughout the buyer journey.

HOW TO USE THE WOLF TO DRIVE SALES →



ELEVATING THE BRAND

By choosing a distinct brand personality and committing to expressing that brand personality across all touchpoints, we premiumize Lunazul. A disjointed effort cheapens the brand by appearing disorganized and unmemorable.

Below are a list of brand signals that qualify as a united, Feed the Wolf front:

- > THE FEED THE WOLF WORD MARK
- > VOICE AND LANGUAGE THAT EXPRESSES A HUNGER FOR LIFE
- > PHOTOGRAPHS INDICATING REAL SURROUNDINGS: SHOTS CAN BE HOSTED IN A STUDIO, BUT SETS NEED TO BE STYLED TO LOOK REAL.
- > THE WOLF SPIRIT - SEE PAGE



SURVEY SUMMARY



WHAT DID WE LEARN?

PREMIUM IS BROUGHT TO LIFE THROUGH TASTE AND EXPERIENCE

Tequila consumers value premium when selecting spirits; with the expectation of a smoother and richer taste, and higher price point.

This premiumness is largely centered around taste and product expectations (e.g. 100% agave) and does not appear to be strongly influenced by marketing or packaging. More important than brand story or an engaging campaign is a standard of authenticity and guarantee of a quality tasting experience.

This does not mean that marketing and packaging does not matter to the tequila consumer, but rather that it is not a determining factor in the premiumness of a product.



WHAT DID WE LEARN?

CONSUMERS AND MANUFACTURERS HAVE DIFFERENT DEFINITIONS OF PREMIUM

The entire concept of the premiumization of the Lunazul brand, may be a misnomer to the average consumer. Increasing the price of Lunazul to the \$21-\$24 range, does not mesh with the operational understanding of premium tequila to the consumer, who equates premium pricing at the 'ultra-premium' level (\$40-\$43).

Based on findings from this survey, Lunazul's price increase will likely keep the brand in the 'mid-tier' range in the eye of the consumer.



WHAT DID WE LEARN?

YOUNGER CONSUMERS VIEW THE FTW CAMPAIGN AS PREMIUM

There is a substantial difference in opinion about the Feed the Wolf campaign by age group, with younger consumers viewing the campaign as more premium than the 45+ crowd. The attitude and mood of the campaign was viewed most favorably by the 21-44 cohort, with additional evidence in imagery exercises of a preference for authenticity and hip/trendy expressions of premiumization

This provides evidence of validation of the existing campaign for the shift to a more premium (as defined by the industry) price-point. Further ideation and research may be needed if targeting the older demographic with the FTW campaign.

SHOULD LUNAZUL POSITION PRODUCT AS A 'PREMIUM' TEQUILA?

- Consider the discrepancy in defining premium between consumer and industry
- Evidence suggests that the proposed price increase will not equate in a shift to premium to the consumer
- The resultant direction may be less about 'premium' and more about authenticity and boldness.

MAINTAIN AUTHENTICITY

- Authenticity was a top driver of premium consideration
- More important to maintain authenticity than project a 'premium' attitude
- Continue to project honesty and realness through storytelling

PERSONALIZE MARKETING BY DEMOGRAPHIC DISTINCTIONS

- Given the different reactions to the Feed the Wolf campaign between younger and older consumers, there is sufficient evidence of distinct messaging needs.
- This does not mean the existing campaign must be rebuilt- as across the board the consumer values authenticity- but rather shifting the focus by demographic.
- Present hip and bold content to younger consumers (e.g. glamping, food trucks) and more relaxed content to more mature consumers.

LEAN INTO THE EXPERIENCE OF DRINKING LUNAZUL

- If positioning the brand as premium, the research suggests that taste is a top consideration for the consumer.
- Find ways to articulate the taste profile through visual and copy cues.
- Increase efforts to build brand evangelists
- Increase partnerships with bars and spirits influencers



LANDSCAPE AUDIT SUMMARY



WHAT DID WE LEARN?

PREMIUM TEQUILA
IS NOT LIKE OTHER
SPIRITS – IT'S
WARM,
WELCOMING,
VIBRANT

Even top-tier premium brands participate in imagery that pushes the boundaries of what “premium” usually means in the spirits category. Where other spirits brands at the premium level display images of affluence and luxury, tequila brands consistently present more attainable imagery – while remaining aspirational. Celebrating, socializing, going out, attending dinner parties, using dating apps, getting caught in the rain – all are in the wheelhouse of premium tequilas. This aligns with survey findings of the Millennial audience’s preference for imagery depicting experiential, authentic, and “hip” activities. Tequila is generally positioned as the beverage for people who want to know they’re living life.



WHAT DID WE LEARN?

TONE IS
SATURATED, AND
DEVIATION IS
REWARDED WHEN
DONE PROPERLY

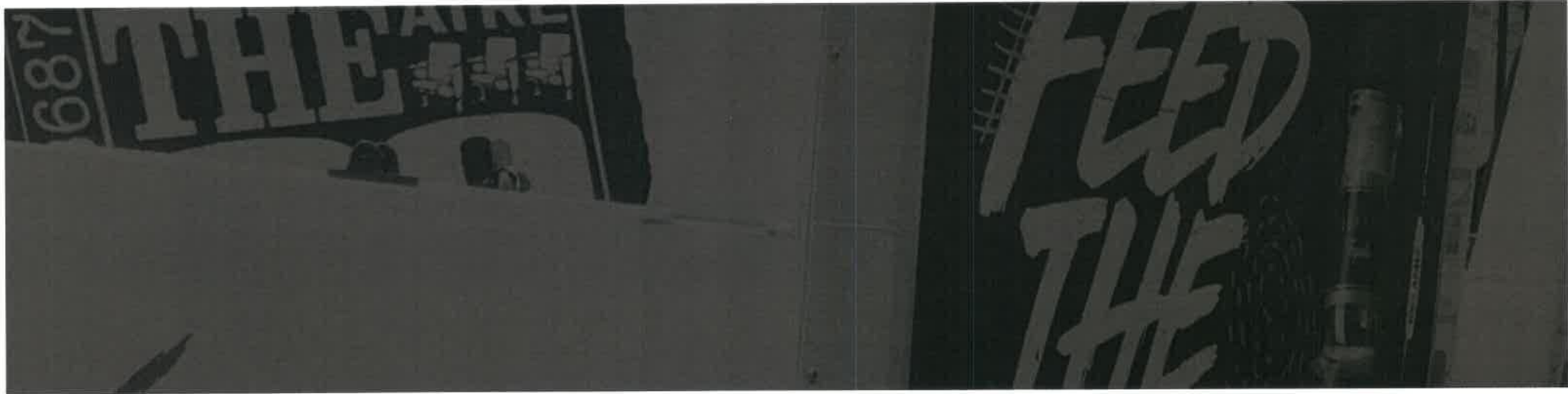
Despite the generally more vivacious approach of tequila branding, as a category, premium tequila imagery generally trends towards more refined consumption. Premium tequilas should be enjoyed and appreciated, not consumed as shots at a rowdy party. Tequila is turning to its heritage as a storied and sophisticated beverage appropriate for affluent or aspirational Millennials. However, there are clear deviations in the landscape. Espolon stands out as a brand that reflects its heritage but embraces the weirdness of Millennial life with open arms and a rowdy, energetic attitude. It's marketing is as popular as its tequila – it's authentic 100% agave, and it tells a story to audiences that feels authentic. Authenticity wins.



WHAT DID WE LEARN?

“PREMIUM”
LANGUAGE IS
NOWHERE TO BE
FOUND; QUALITY
IS IMPLIED

There are few to zero examples of brands utilizing “premium” as a marketing keyword to describe themselves or their products. Instead, premium tequila brands rely on marketing assets that focus on markers of quality and authenticity: 100% agave, flavor, and manufacturing instead convey premium status. Similarly, premium tequila is indicated with “trendy” food + beverage imagery: interesting or fresh cocktail ingredients, and meals to match. The WAY premium tequila should be treated is what matters.



What this could mean for future creative: [Leave it be.](#)

Taking in the consideration how “Premium” conjures broad interpretation, the creative, untouched and where it stands today - to our younger audience samples, signals a premium experience. Which is good news given the intention to raise the price. FTW signals premium to our younger target already. If we want FTW to signal premium to an older audience, we'd have to make adjustments.

Additionally, if this is so, it suggests the FTW campaign's shelf life is healthy and confidently relevant as we push to a more premium space in the future.



**TRUE
FOOD**
KITCHEN

True Food Kitchen Performance Media Report

July 14th-August 31st 2023

(amp)
a leapgroup co.

AGENDA

All-in Performance

Evergreen Performance

Plus Up Performance

Social Performance



ALL-IN PERFORMANCE

Jul 14, 2023 - Aug 31, 2023

AWARENESS

	BUDGET	COST	IMPRESSIONS	VIEWS/CLICKS	CPM	CPV/CPC
iHeart Radio	\$20,105	\$20.11K	801.3K	22,300	\$25.09	\$0.9
Google - YouTube	\$19,917	\$20.8K	2.1M	351,229	\$10.00	\$0.06
Meta	\$39,733	\$44.73K	18.8M	1,374,973	\$2.38	\$0.03
TOTALS	\$79,755	\$85.63K	21.7M	1,748,502	\$3.94	\$0.05

CONSIDERATION

	BUDGET	COST	IMPRESSIONS	CLICKS	CTR	EPC
Meta	\$13,847	\$14.8K	2.5M	27,195	1.11%	\$0.54
Google - Display Network	\$1,000	\$1.11K	75.3K	400	0.53%	\$2.77
Google - Paid Search	\$13,233	\$13.06K	349.4K	17,267	4.94%	\$0.76
TOTALS	\$28,180	\$28.97K	2.9M	44,862	1.56%	\$0.65

CONVERSION

	BUDGET	COST	IMPRESSIONS	CLICKS	CR	CONVERSIONS
Google - Paid Search	\$67,083	\$68.22K	202,420	81,667	\$0.84	5,502

ROAS
3.79

	BUDGET	COST	IMPRESSIONS	VIEWS/CLICKS
TOTALS	\$168K	\$175K	24.8M	2.2M

ONLINE SALES \$287.22K IN-STORE SALES \$375.6K TOTAL SALES \$662.82K

JULY (14 - 31) - ONLINE ORDERS (Account level data)

	Cost	Impressions	Clicks	CTR	CPC	Conv.	Conv. Rate	Cost / Conv.	Conv. Value	ROAS
2023	\$25,462	382,386	27,688	7.24%	\$0.92	1145	4.14%	\$22.24	\$61,392	2.41
2022	\$19,898	18,762,070	67,518	0.36%	\$0.29	279	0.41%	\$71.32	\$15,344	0.77
% diff	28%	-98%	-59%	1912%	212%	310%	901%	-69%	300%	213%

AUGUST (1 - 31) - ONLINE ORDERS (Account level data)

	Cost	Impressions	Clicks	CTR	CPC	Conv.	Conv. Rate	Cost / Conv.	Conv. Value	ROAS
2023	\$82,693	2,342,083	76,008	3.25%	\$1.09	4651	6.12%	\$17.78	\$242,491	2.93
2022	\$33,246	24,247,900	68,161	0.28%	\$0.49	291	0.43%	\$114.25	\$17,513	0.53
% diff	149%	-90%	12%	1055%	123%	1498%	1333%	-84%	1285%	457%



EVERGREEN PERFORMANCE

Jul 14, 2023 - Aug 31, 2023

AWARENESS

	BUDGET	COST	IMPRESSIONS	VIEWS/CLICKS	CPM	CPV/CPC
Meta	\$15,333	\$14.9K	6.5M	486,323	\$2.29	\$0.03

CONSIDERATION

	BUDGET	COST	IMPRESSIONS	CLICKS	CTR	CPC
Meta	\$6,550	\$6.44K	1.1M	11,566	1.08%	\$0.56
Google - Display Network	\$500	\$554.47	37.6K	200	0.53%	\$2.77
Google - Paid Search	\$3,967	\$7,096.53	54.3K	7,460	13.73%	\$0.95

TOTALS	\$11,016	\$14.09K	1.2M	19,226	1.65%	\$0.73
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CONVERSION

	BUDGET	COST	IMPRESSIONS	CLICKS	CPC	CONVERSIONS
Google - Paid Search	\$55,767	\$53,186.93	164,954	66,643	\$0.8	4,325

	BUDGET	COST	IMPRESSIONS	VIEWS/CLICKS
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TOTALS	\$82,116	\$82.18K	7.8M	572.2K
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ROAS
6.35

ONLINE SALES	\$225.82K	IN-STORE SALES	\$295.3K	TOTAL SALES	\$521.11K
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AWARENESS		BUDGET	COST	IMPRESSIONS	VIEWS/CLICKS	CPM	CPV/CPC
iHeartRadio		\$20,105	\$20.11K	801.3K	22,300	\$25.09	\$0.9
Google - YouTube		\$21,333	\$20.8K	2.1M	351,229	\$10	\$0.06
Meta		\$30,633	\$29.83K	12.3M	888,650	\$2.42	\$0.03
TOTALS		\$87,405	\$70.73K	15.2M	1,262,179	\$4.65	\$0.06
CONSIDERATION		BUDGET	COST	IMPRESSIONS	CLICKS	CTR	CPC
Meta		\$8,643	\$8.37K	1.4M	15,629	1.13%	\$0.54
Google - Display Network		\$500	\$554.47	37.6K	200	0.53%	\$2.77
Google - Paid Search		\$11,533	\$10.93K	312.4K	13,276	4.25%	\$0.82
TOTALS		\$20,677	\$19.85K	1.7M	29,105	1.68%	\$0.68
CONVERSION		BUDGET	COST	IMPRESSIONS	CLICKS	CPC	CONVERSIONS
Google - Paid Search		\$18,400	\$21.3K	68,535	21,267	\$1.00	1,155
				BUDGET	COST	IMPRESSIONS	VIEWS/CLICKS
TOTALS		\$126,482	\$90.58K	16.9M	1,117,628		
ROAS							
1.53							
ONLINE SALES		\$60.26K	IN-STORE SALES		\$78.8K	TOTAL SALES	
						\$139.06K	



PAID SOCIAL OVERVIEW

Jul 14, 2023 - Aug 31, 2023

Impressions

21,279,925

CPM

\$2.80

Clicks

55,720

CTR

0.26%

CPC

\$1.07

OVERVIEW OF PERFORMANCE

The first two months of the True Food Kitchen Summer Campaign consisted of a mix of creative messages amplified across multiple audience segments and objectives on Meta. Those creative messages were focused on new menu items: BBQ Chicken, Watermelon Salad, and Root Beer Float, free delivery and 50% off wine promotions, and evergreen assets focused on Dinner and Brunch.

In the first two months, the Summer campaign delivered 21+ million impressions, over 1.8 million video views, and over 41k clicks with a CTR of 0.19%.

The 50% off wine promotion is averaging the lowest CPM across markets with an average CPM of \$2.00.

The root beer float has consistently driven the highest number of link clicks and the lowest CPC throughout the campaign both on a national and with a CPC of \$0.54.

Users between the age of 25-34 make up over 30% of the campaign's total impressions with over 6.6M impressions and over 25% of the campaign's total links with 10k+ link clicks. Making them the most engaged set of users.

Campaign	Impressions	Reels	CPM	Video Views	CPV	Link Click	CTR	CPA	Amount Spent
Plus-Up LA	7.1M	2M	\$2.14	453,583	\$0.03	6,286	0.09%	\$2.43	\$15,283.35
National	6.5M	1M	\$2.29	486,323	\$0.03	5,839	0.09%	\$2.55	\$14,904.69
Plus-Up Austin	5.2M	1.2M	\$2.81	435,067	\$0.03	5,537	0.11%	\$2.63	\$14,542.99

Awareness Insights

The evergreen dinner video generated the most scale with over 50% of the campaign's total impressions. Although the creative worked hard for us in terms of impressions, the CPM steadily increased week over week. Similarly, the evergreen brunch video had a nearly 30% increase in terms of CPM from July to August. This indicates the creative fatigues quickly with this audience and we will want to have multiple assets for each message.

The 50% wine promo (shown to the right) had the lowest CPM across both the Plus-Up and National markets. We had two videos for this promotion that were staggered throughout the 2 months, allowing us to push a message that is working with the audience in a variety of ways.

The dinner and brunch ads were paused in August and creative was updated, adding in the new menu items and promotions at the awareness level. That creative refresh led to our most-successful 3-day stretch in bottom-funnel (brand paid search) conversions to-date.

TOP PERFORMING PLUS UP CREATIVE

Impressions
1,510,741

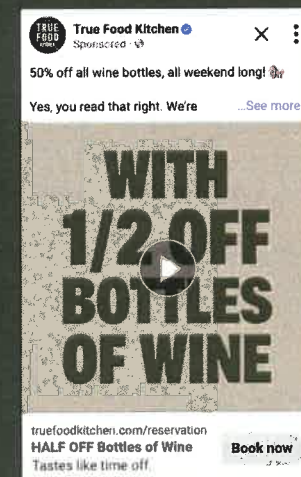
CPM
\$2.00



TOP PERFORMING NATIONAL CREATIVE

Impressions
1,138,916

CPM
\$2.21



Campaign	Impressions	Reach	CPM	Video Views	CPV	Link Clicks	CTR	CPC	Amount Spent
National	1.1M	350.2K	\$6.01	126,148	\$0.05	9,314	0.87%	\$0.69	\$6,435.63
Plus-Up Austin	706.9K	120.3K	\$5.9	109,672	\$0.04	7,897	1.12%	\$0.53	\$4,174.31
Plus-Up LA	675.5K	149.2K	\$6.21	83,530	\$0.05	6,274	0.93%	\$0.67	\$4,193.37

Consideration Insights

New menu items rose to the top in the consideration campaign. The Root Beer Float drove over 11k of the campaign's 17k link clicks and averaged a CTR of 1.03%. The Watermelon Salad and BBQ also performed well with the Watermelon Salad also averaging a 1.03% CTR and the BBQ Chicken Sandwich averaging a CTR of 1.01%.

The promotions fell to the bottom in terms of CTR with the 50% off Wine averaging a CTR of 0.84% and the Free Delivery averaging a CTR of 0.74%, both just slightly below the industry benchmark of 0.89%.

Users are currently more inclined to engage with and consider new menu items. Promotional offers, while still generating interest, indicating a need to fine-tune creative to align more closely with customer preferences. In September, we began testing additional creative for these promotions.

TOP PERFORMING PLUS UP CREATIVE

Link Clicks

4,354

CPC

\$0.48



TOP PERFORMING NATIONAL CREATIVE

Link Clicks

3,796

CPC

\$0.61



Users between the age of 25 and 34 are most engaged with the content, followed by 35-44. Facebook is currently making up over 70%+ of the total impressions and over 80% of the campaign's total link clicks. This is typical with automatic placements as video is favored among Facebook placements. Consider testing split budgets between Instagram and Facebook to get in front of the more of our most engaged users.

The new menu items are currently outperforming promotions at the consideration level, but promotions are winning at the awareness level. Continue testing to further leverage both value propositions in both stages of the funnel.

We have not utilized many static assets yet. Test these at the consideration level, specifically with promotions, as we have seen the quicker the users can process a message, the more likely they are to engage.

Shorter creative flights will reduce fatigue. We recommend 2-3 assets per message to keep the ad fresh and top of mind with the audience. Within these shorter flights, we will test different executions of the messaging – GIF, lifestyle, food focused, etc.



**TRUE
FOOD**
KITCHEN

True Food Kitchen Performance Media Report

YTD 2024

(amp)

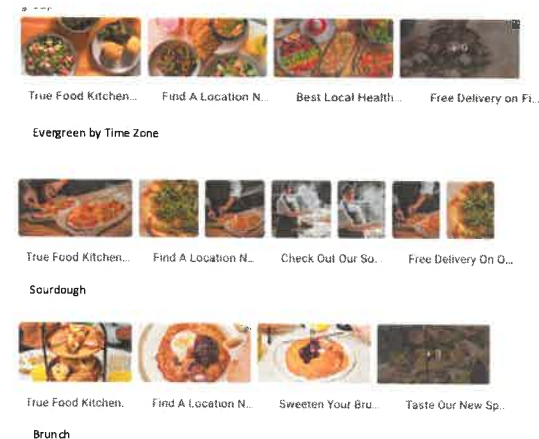
YTD Performance - Digital Media Return (draft)



Performance Max - YTD 2024 Performance & Insights

Benchmark: \$4.68					Benchmark: \$1.25			
Campaign	Cost	Impr.	Clicks	CTR	Avg. CPC	Conversions	Conv. Rate	Cost / conv.
Evergreen PMAX	\$811,611	156,707,547	293,646	0.19%	\$2.56	638,345	0.41%	\$1.27
Sourdough PMAX	\$104,606	23,910,462	46,760	0.20%	\$2.24	101,263	0.42%	\$1.03
Brunch PMAX	\$60,150	9,864,691	29,364	0.30%	\$2.05	67,684	0.69%	\$0.89
TOTALS	\$976,366	190,482,700	369,770	0.19%	\$2.64	807,292	0.42%	\$1.21

- In 2024 to date, we spent just under \$1M on store visit PMAX campaigns.
 - 190MM+ impressions (+691%)
 - 367K clicks (+494%)
 - 801K+ store visits (+1,000%)
 - Cost/SV = \$1.21 (goal = <\$1.25)
- The 2024 PMAX campaigns have demonstrated remarkable efficiency in driving actual footfall to stores. With a total spend of \$976,336 (a significant increase from \$47,000 in the previous year), the campaigns have delivered exceptional results.
- These results highlight the effectiveness of PMAX campaigns in scaling performance and generating substantial in-store engagement. Despite the significant increase in spend, the campaigns have maintained impressive cost efficiency while dramatically increasing reach and driving tangible outcomes.
- Evergreen campaigns were the most efficient campaigns at scale, delivering over 638k store visits with a Cost/SV \$1.27, slightly above our target.
 - However, in terms of CPA, Brunch was the most cost-effective campaign with a cost/SV of \$0.89. Overall volumes limit the amount of spend that can be pushed through Brunch.



Evergreen Performance Max - YTD 2024 Performance & Insights

Benchmark: \$4.68

Benchmark: \$1.25

Campaign	Cost	Impr.	Clicks	CTR	Avg. CPC	Conversions	Conv. Rate	Cost / conv.
Evergreen - PST	\$177,053	33,338,898	69,287	0.21%	\$2.56	168,607	0.22%	\$1.05
Evergreen - EST	\$362,228	64,847,977	146,259	1.65%	\$2.48	324,886	0.50%	\$1.11
Evergreen - CST	\$116,373	22,752,430	39,697	0.17%	\$2.93	74,605	0.22%	\$1.56
Evergreen - MST	\$58,958	14,729,622	11,459	0.08%	\$5.15	32,133	0.22%	\$1.83
Evergreen - Cherry Creek	\$18,066	1,623,080	2,700	0.17%	\$6.69	3,189	0.16%	\$5.67
Evergreen - Dallas	\$20,484	3,208,815	3,575	0.11%	\$5.73	2,503	0.12%	\$8.18
Evergreen - Miami	\$14,931	5,353,863	4,955	0.09%	\$3.01	3,343	0.22%	\$4.47
Evergreen - Summerlin	\$13,611	1,896,084	2,322	0.12%	\$5.86	2,800	0.19%	\$4.86
Evergreen - Scottsdale	\$11,698	1,947,327	1,864	0.10%	\$6.28	2,822	0.35%	\$4.15
TOTALS	\$811,611	156,707,547	293,646	0.19%	\$2.76	638,345	0.41%	\$1.27

- In 2024, we spent over \$811K on store visits PMAX EG campaigns.
 - 156.7MM impressions (+619%)
 - 276.6k clicks (+521%)
 - 638K+ store visits (+1.2k%)
 - Cost/SV = \$1.27 (goal = <\$1.25)



Evergreen by Time Zone

Paid Search - YTD 2024 Performance

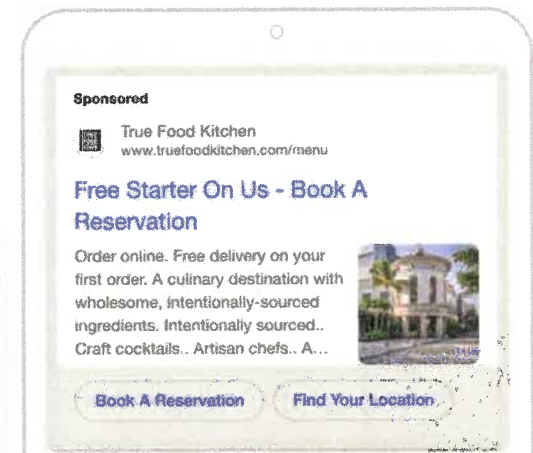
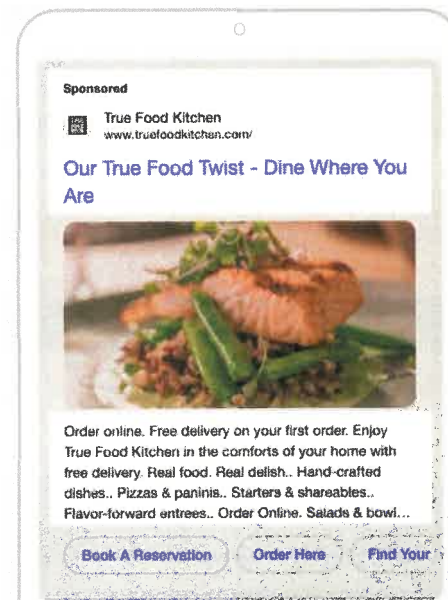
Bmk: 4.68%

Bmk: \$1.53

Campaign	Cost	Impr.	Clicks	CTR	Avg. CPC	Conversions	Conv. Rate	Cost / conv.
L_TFK_EG_NB_OO_Dinner_Conversion-jt	\$28,088	943,699	33,697	3.57%	\$0.83	4,704	13.96%	\$5.97
L_TFK_EG_NB_OO_Healthy-Food_Conversion-jt	\$55,797	1,255,214	71,683	5.71%	\$0.78	9,547	13.32%	\$5.84
L_TFK_EG_NB_OO_Lunch_Conversion-jt	\$36,893	835,050	45,505	5.45%	\$0.81	7,374	16.21%	\$5.00
L_TFK_EG_NB_OO_Restaurants-Near-Me_Conversion-jt	\$57,565	1,995,547	76,172	3.82%	\$0.76	11,050	14.51%	\$5.21
L_TFK_EG_NB_OO_Vegan_Conversion-jt	\$46,372	913,631	73,752	8.07%	\$0.63	8,259	11.20%	\$5.62
L_TFK_EG_NB_CV_Seed-Oil-Free_Conversion-jt	\$26,708	74,937	7,757	10.35%	\$3.44	524	6.76%	\$50.95
L_TFK_EG_NB_SV_Patio_Conversion-jt	\$40,966	608,580	21,007	3.45%	\$1.95	1,183	5.63%	\$34.62
L_TFK_EG_NB_Lunch_Reservation-jt	\$22,652	457,124	18,955	4.15%	\$1.20	123	0.65%	\$184.21
L_TFK_EG_NB_SV_Happy-Hour_Conversion-jt	\$21,110	293,241	9,987	3.41%	\$2.11	646	6.46%	\$32.70
TOTALS	\$373,114	8,132,802	515,858	6.34%	\$0.72	56,321	10.92%	\$6.62

Paid Search - YTD 2024 Insights

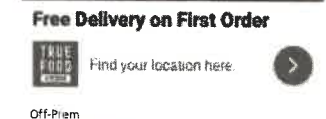
- We spent \$373k on paid search in 2024.
 - 8.1MM impressions (+426%)
 - 515.9K clicks (+85%)
 - 56.3K conversions (+175%)
- Key takeaway of the year: Broad, relatable themes such as “Healthy Restaurants,” “Organic Food Near Me,” and “Healthy Food” consistently delivered high impression volumes and strong conversion potential, albeit with varying cost efficiencies. These terms highlight the effectiveness of aligning campaigns with popular and accessible topics that resonate across audience segments.
 - However, the data suggests that broad match keywords, while effective at driving scale, often lack the cost-efficiency seen in phrase match terms. By focusing awareness campaigns on broader topics to maximize reach and using specific, high-intent keywords at the consideration stage, we can achieve both scale and efficiency in the funnel.
 - Expanding negative keyword lists and refining match types for underperforming terms (e.g., adjusting “Organic Food Near Me”) will further enhance the cost efficiency of broad search campaigns while maintaining strong conversion volumes.
- Efforts to increase the presence of non-brand searches resulted in a +85% YoY increase in clicks and a +275% YoY uplift in conversions, highlighting the importance of expanding non-brand targeting.



Display – YTD 2024 Performance & Insights

Campaign	Cost	Impr.	Clicks	Benchmark: 0.47%	Benchmark: \$0.51	Benchmark: \$5.05
				CTR	Avg. CPC	CPM
Off-Prem	\$43,938	4,538,142	70,444	1.55%	\$0.62	\$9.68
Brand Standards	\$17,482	3,340,408	30,267	0.91%	\$0.58	\$5.23
Crisp'd	\$37,626	10,662,823	81,120	2.31%	\$1.10	\$3.53
TOTALS	\$105,131	19,890,018	196,069	0.99%	\$0.54	\$5.29

- Total spend on display campaigns was \$105,131, a significant increase compared to \$25,838.34 in 2023, reflecting a focus on scaling these efforts.
 - Achieved 19.9M impressions (+348% YoY) and 196,069 clicks (+644% YoY), showcasing substantial growth in reach and engagement. CTR improved to 0.99% in 2024 from 0.59% in 2023 (+68%), well above the benchmark of 0.47%.
 - Crisp'd Campaign delivered a 2.31% CTR, significantly above the benchmark, driven by frequently updated creatives. The campaign effectively leveraged display ads to drive 81,120 clicks and maintain strong efficiency with a \$1.10 CPC.
 - Off-Prem Campaign achieved a solid 1.55% CTR, outperforming the benchmark, but slightly below Crisp'd.
 - The higher CPM of \$9.68 suggests an opportunity to optimize placement strategies and improve cost efficiency.
- Despite lower spend, the Brand Standards campaign efficiently drove 30,267 clicks, making it a key contributor to overall performance



YouTube - YTD 2024 Performance & Insights

Benchmark: 0.10%

Benchmark: \$4.68

Creative	Spend	Impr.	Clicks	CTR	Avg. CPC	CPM	Views	View Rate	CPV
Ingredient Standards	\$107,552	14,725,084	4,195	0.03%	\$25.64	\$7.30	4,646,144	31.55%	\$0.020
Brand Standards	\$28,982	4,079,175	8,036	0.15%	\$4.80	\$7.10	1,609,111	39.45%	\$0.020
Crisp'd Tender Bender	\$2,864	841,189	208	0.02%	\$13.77	\$3.40	119,317	14.18%	\$0.020
Crisp'd Tender Tuesday	\$2,864	444,933	311	0.07%	\$9.21	\$6.44	237,573	53.40%	\$0.010
TOTALS	\$142,263	20,090,381	10,750	0.05%	\$13.23	\$7.08	6,612,145	32.91%	\$0.022

- In 2024, we spent \$142K on YouTube running the Brand & Standards video campaigns.
 - 20MM viewable impressions (+312%)
 - 10.8K clicks (+7%)
 - CPV = \$0.022 (-39%)
- The overall CPV dropped to \$0.022 (-39% YoY), highlighting significant improvements in cost efficiency.
- View rate increased to 32.91%, indicating strong engagement despite the lower CTR of 0.05%.
- The 25–34 age group generated the highest number of conversions, followed closely by the 35–44 segment. Both age groups had higher click engagement, emphasizing their importance in targeting.
- Minimal engagement from higher-income brackets (Top 10%) indicates potential refinement in messaging or targeting strategies.
- Non-parents drove the majority of video views, suggesting that content is resonating better with younger, independent audiences.



True Food Kitchen
Ad - truefoodkitchen.com

Brand Standards



Tender Tuesday At True Food



Enjoy Tender Tuesday At
True Food Kitchen.



Meta Awareness - YTD 2024 Performance & Insights

Creative	Spend	Impressions	Reach	CPM	Views	CPV	% of Thru Plays	Cost Per Thru Play
Q1	\$35,000.00	14,092,602	3,825,110	\$2.48	5,069,001	\$0.01	37.32%	\$0.02
Q2	\$30,000.00	9,392,189	4,126,529	\$3.19	3,817,527	\$0.01	41.40%	\$0.02
Q3	\$52,556.00	16,624,652	7,380,924	\$3.16	2,918,015	\$0.02	31.28%	\$0.06
Q4	\$26,164.00	9,831,018	2,891,819	\$2.66	854,417	\$0.03	9.78%	\$0.31
	\$143,720.00	49,940,461	18,224,382	\$2.88	12,658,960	\$0.03	33.17%	\$0.03

- Broad, relatable themes like "Spring Menu" "free delivery" and "brunch" consistently deliver cost-efficient reach and engagement, suggesting that tying campaigns to universally appealing and timely occasions drives both scale and performance. Focus our awareness efforts on broader topics and allow the more specific messaging to be focused at the consideration level
- In the first half of the year, we were primarily seeing an audience of 45+, in Q3 we started to see this switch. This could be in part to focusing on Instagram starting in Q2, but started to see the Crisp'd campaign move the needle with this. The year finishes out with 25-34 making up 25% of the campaign's total impressions, followed by 35-44 with 18%.
- Females made up just over 50% of the campaign's total impressions, males were not far behind with 48%.



Top performing by CPM - Free delivery (\$2.43 CPM)



Top performing by impressions - Brunch (21M)

TFK YTD Benchmarks:

\$3.37 CPM

\$0.01 CPV

Meta Consideration - YTD 2024 Performance & Insights

Creative	Spend	Impressions	Frequency	Link clicks	CPC	CTR
Q1	\$39,955	6,869,349	5.58	81,640	\$0.49	1.19%
Q2	\$62,157	7,409,670	3.85	134,927	\$0.46	1.82%
Q3	\$33,521	3,713,839	3.55	65,291	\$0.51	176.00%
Q4	\$10,168	505,006	3.45	4445	\$2.29	88.00%
Totals	\$145,812.00	18,497,864	4.25	286,303	\$0.51	1.55%

- Happy Hour was a win from an overall engagement campaign. This worked as we hit users with the menu items at the awareness level and then retargeted video viewers who had an interest in specials and saw this content work as a result.
- Crisp'd was the most efficient in terms of Cost Pers, highlighting new menu items that are of interest to the audience work effectively at the consideration level.
- Continue tailored messaging for specific offerings, consider adding in calling out specific store locations in plus up markets.



Top performing by CPC – Crisp'd (\$0.56)



Top performing by link clicks– Brunch (79k)

TFK YTD Benchmarks:
\$0.58 CPC
2.54% CTR

Industry Benchmarks:
\$0.63 CPC
0.90% CTR

Plus-Up Awareness - YTD 2024 Performance & Insights

Creative	Spend	Impressions	Reach	CPM	Views	CPV	% of Thru Plays	Cost Per Thru Play
Q3	\$33,146.00	6,701,678	2,079,949	\$4.95	1,950,445	\$0.0170	29.37%	\$0.058
Q4	\$42,439.63	8,247,286	3,342,177	\$5.15	2,287,178	\$0.0180	53.49%	\$0.019
Totals	\$75,585.63	14,948,964	5,422,126	\$5.06	4,237,623	\$0.01	35.30%	\$0.03

- Dallas, Scottsdale, and Denver were the top performing markets from a Plus Up perspective, all under \$4 CPMs.
- Brunch and Happy Hour are by far driving the most interest across all markets. These asset are the perfect example of high impact videos working. Food first, quick hitter content.
- In the plus up markets, men are making up over 60% of the campaign's total impressions, 25-34 is the primary audience.



**TFK YTD
Benchmarks:**
\$3.37 CPM
\$0.01 CPV

Plus-Up Consideration – YTD 2024 Performance & Insights

Creative	Spend	Impressions	Frequency	Link clicks	CPC	CTR
Q3	\$34,237.00	443,631	1.84	1,170,684	\$0.03	3.57%
Q4	\$41,801.00	2,653,524	4.17	55,866	\$0.75	1.25%
Totals	\$78,038.00	3,097,155	3.75	1,226,550	\$0.06	3.29%

- Focusing on specific markets has allowed us to sharpen our paid social efforts, resulting in stronger audience engagement. This is particularly evident in markets like **Denver**, where in the broader national campaign, the budget allocation tends to favor other regions.
- Brunch** and **Happy Hour** are by far driving the most interest across all markets. “This and Yap” happy hour creative won in the plus-up markets; this is a perfect example of content that capitalizes on relevant organic conversation.



TFK YTD Benchmarks:
\$0.58 CPC
2.54% CTR

Industry Benchmarks:
\$0.63 CPC
0.90% CTR

4.2.1.2. Creative Services

Creative is how strategy comes to life. For the State Treasurer's Office (STO), creativity is not decoration—it is translation. A parent considering SMART529, a retiree exploring Retirement Plus, or an individual with disabilities weighing WVABLE will not engage with abstract financial mechanisms. They need stories they can see, hear, and trust. That means creative services must deliver professional-quality print, digital, audio, and video assets that not only look polished but also simplify complex information and invite participation.

West Virginians deserve materials that feel accessible, locally grounded, and reliable, whether it is a billboard in Charleston, a Hope Scholarship explainer video on social media, or an Unclaimed Property flyer handed out at the State Fair.

Our In-House Creative Capabilities

All creative services will be provided in-house, ensuring quality, consistency, and cost transparency. With more than 125 full-time staff across strategy, design, media, production, and analytics. We maintain complete creative capacity and do not plan to use sub-contractors.

Our creative services span:

- **Commercial-quality design:** logos, infographics, style guides, print collateral, outdoor displays, and event branding.
- **Copywriting & message development:** plain-language explanations of financial programs, eligibility steps, and deadlines.
- **Photography & videography:** in-house production teams deliver broadcast-ready videos, social shorts, and still photography with narrative quality.
- **Storyboarding & pre-visualization:** ensuring concepts are grounded in research and community storytelling before production begins.
- **Audio production:** radio ads, streaming audio spots, and voiceover content that meet professional broadcast standards.
- **Print production:** brochures, flyers, posters, direct mail pieces, and inserts optimized for readability and distribution efficiency.
- **Digital assets:** HTML5 display ads, social media graphics, email templates, landing pages, and web modules.

Because all services are managed internally, the Treasurer's Office benefits from seamless collaboration between creative, media, and analytics teams—eliminating markup costs and ensuring each asset is accountable to campaign goals.

Storytelling Through Creative: Proof in Practice

Our work shows that creative services are only powerful when they are rooted in research, strategy, and storytelling. We do not design in isolation, we create assets that move people to act. The following case studies demonstrate our ability to produce professional-quality creative across all media, print, digital, audio, video, and integrated campaigns, all provided in-house with no subcontractors.

- **City of Mason (Brand Identity & Website Redesign)**
Mason's growth demanded a unifying identity that reflected its community values. We created a comprehensive brand system that included a new logo, signage, promotional materials, print collateral, and a redesigned website that offered intuitive navigation and real-time event calendars. Every piece—from banners on Main Street to digital newsletters—was produced in-house, ensuring consistency and cost control.
- **Hamilton County, OH – Michelle Obama's *Let's Move!* Campaign**
For this nationally recognized initiative, we built a multi-channel creative suite: 60-second television spots, radio PSAs, highway billboards, print collateral for schools, digital ads, and interactive GIS tools that helped families find healthy resources. Importantly, all assets were designed with equity in mind—culturally inclusive, bilingual, and accessible.
- **Belle of Louisville (Website, Ticketing, and Fundraising Collateral)**
The Belle, a National Historic Landmark, needed more than just a website refresh—it required a seamless integration of creative across ticketing, fundraising, and promotional assets. We developed a modern, mobile-friendly site, integrated donation tools, and designed collateral for print and digital channels. The creative system simplified complex processes (like ticket booking), just as STO creative must simplify financial concepts like deferred compensation or 529 contributions.
- **American Kennel Club (National Brand Campaign)**
We produced a full broadcast-ready campaign—beginning with storyboarding, scripting, and production of a :60 national television spot, supported by multiple :30, :15, and :06 cutdowns tailored for digital, social, and event channels. All creative was delivered in-house, from editing to audio mastering. This campaign demonstrates our ability to deliver video that is not only polished for national broadcast but also emotionally resonant—a skill critical for STO when translating financial services into human-centered stories of saving, security, and opportunity.
- **Lunazul Tequila (Rebrand & “Feed the Wolf” Campaign)**
Lunazul sought to reposition itself as a premium tequila. We created a bold integrated campaign—filming cinematic product videos, designing store displays, producing event collateral, and generating digital/social creative tailored to both urban and rural markets. The result was a 140% increase in sales and 366 million impressions. This project demonstrates our ability to reposition perception through coordinated creative storytelling—directly relevant to STO programs like WVABLE, where overcoming misconceptions requires strong, clear, and aspirational creative.
- **Louisville Water Company (PureSpout Launch)**
For the introduction of a new filtration product, we built an entire sub-brand identity—logo, packaging, brochures, and explainer videos—anchored in trust and safety. This mirrors the kind of creative needed for STO's WV457 Retirement Plus, where technical financial products must be presented as approachable and reliable.
- **University of Cincinnati & Georgia Southern University (Enrollment Marketing)**
For higher education clients, we developed print and digital campaigns that balanced inspiration with clarity. Our creative included digital ads, streaming video, search graphics, and out-of-home placements, all tied to enrollment deadlines. This experience



directly parallels STO's Hope Scholarship, where families must understand eligibility, timelines, and next steps through creative assets that are both motivational and practical.

Deliverables (per RFP and STO needs)

Based on the RFP requirements, (amp) will deliver:

- **Commercial-quality designs** (logos, infographics, brochures, signage, OOH placements)
- **Copywriting & messaging** (program-specific plain-language campaigns)
- **Photography** (campaign shoots, event coverage, lifestyle imagery)
- **Storyboards & scripts** for TV, radio, and digital spots
- **Video production** (broadcast-ready TV spots, digital shorts, explainer videos)
- **Audio production** (radio spots, streaming audio, voiceovers)
- **Print materials** (flyers, brochures, direct mail, newsletters)
- **Digital deliverables** (social graphics, display ads, HTML5, email templates, microsites)

All products will be final, professional, and press- or broadcast-ready.

Why This Matters for STO

The State Treasurer's Office is not marketing a single product; it is stewarding trust across multiple programs that touch the lives of West Virginians in very different ways. Creative services must therefore do more than simply "look professional." They must translate financial mechanisms into relatable, human-centered stories, told consistently across print, digital, audio, and video. By keeping all services in-house, the STO gains several advantages:

- **Unified Storytelling**
Every asset—whether a Hope Scholarship explainer video, a SMART529 enrollment kit, or a WVABLE flyer—is built from the same creative framework. This ensures that programs feel like part of one Treasury family, reinforcing the credibility of the Office itself.
- **Cost Transparency and Efficiency**
Because nothing is subcontracted, STO will never face hidden markups or vendor pass-throughs. Every dollar allocated directly funds strategy, production, and media placement. This aligns with the state's emphasis on stewardship and accountability. It also allows us to make mid-course adjustments—such as reallocating production spend from a radio PSA to a more effective digital explainer—without waiting on outside vendors.
- **Local Resonance**
Our creative is rooted in West Virginia-specific research. A video about SMART529, for example, will not feature generic stock imagery—it will show real West Virginia families, teachers, and students in familiar community settings. This approach builds trust because people see themselves reflected in the message. Just as our Hamilton County *Let's Move!* creative used local voices and landmarks to connect national health goals to

neighborhood realities, STO creative will be tailored to resonate in Charleston, Martinsburg, Wheeling, and beyond.

End-to-End Accountability

From storyboard to press-ready print, our team takes responsibility for the full production lifecycle. This ensures every deliverable ties back to program-level KPIs such as:

- SMART529: new account openings and average contribution growth
- Unclaimed Property: claims initiated and successfully paid
- WVABLE: number of accounts opened and total assets contributed
- Retirement Plus: enrollment increases among eligible state employees
- Hope Scholarship: applications completed before deadlines
- Financial Education: school participation in “Get A Life” and other initiatives

Each piece of creative, whether a 15-second social video, a direct mail postcard, or a highway billboard—will be designed and measured against these outcomes.

Creative is not an add-on service at (amp); it is the engine that makes programs visible, relatable, and actionable. By keeping all services in-house, we ensure professional quality, accountability, and storytelling power, delivering the print, digital, audio, and video assets the West Virginia State Treasurer’s Office needs to meet its 2025–2029 goals.

4.2.1.3. Campaign Context & Program Selection

For this example, we focus on the Unclaimed Property Division, which holds millions in assets owed to West Virginians. Despite statewide awareness efforts, research shows that many residents either do not believe they have property to claim, are unsure how to search, or distrust the process. A six-week campaign must overcome these barriers through clarity, trust, and repeated touchpoints across multiple channels.

Our approach is informed by prior success with large-scale campaigns where the goal was to transform perception and drive measurable action. For instance, with the American Kennel Club’s (AKC) “Everything We Do, We Do for Dogs” campaign, we repositioned a 140-year-old organization for a younger, digitally native audience. We developed a unified creative platform, produced a :60 national television spot, and deployed supporting digital, social, and event assets. The campaign improved brand sentiment, expanded reach, and gave AKC a scalable framework for ongoing growth. The lesson for STO: when creative is anchored in audience insights and carried consistently across platforms, participation follows.

Step 1: Discovery & Budget Alignment

In a six-week window, every misassumption is costly. If we start by guessing—who’s likely to have unclaimed property, what they fear, which channels they actually see, we spend precious budget teaching ourselves. If we start with discovery, we spend to move people. Our first step therefore translates research into a budget and channel plan that is specific to West Virginia and accountable to verified outcomes (searches, verified claims, dollars returned).

1) Audience insights grounded in West Virginia reality

We begin by mapping who is most likely to have unclaimed property and why they have not claimed it yet. Using STO-provided, privacy-safe aggregates (county/ZIP heat maps of unclaimed balances and historical claim rates) and third-party demographic data, we build a segmentation that drives both message and media:

- **Long-tenure homeowners (40+)** — Often have dormant utility refunds, insurance disbursements, or bank accounts; skeptical of “too good to be true.”
- **Small businesses & organizations** — Church treasuries, volunteer fire departments, booster clubs, local contractors; high dollar value per claim and strong community storytelling value.
- **Estate & life-transition claimants** — Executors, recent widows/widowers, families handling a move or inheritance.
- **Young movers (18–34)** — Address changes create stale records; digital-first outreach is critical.
- **Public sector employees** — Payroll, travel, or benefits-related refunds; efficient to reach via employer channels.

What we’re looking for: counties with high unclaimed balance per capita and low recent claim rates, ZIPs with high move-in/move-out churn, and employers/associations that can credibly carry the message (city/county governments, school districts, disability advocates, libraries).

2) Barrier & Message Testing

Our discovery confirms the primary barrier is trust (“Is this real?”), followed by process friction (“I don’t have time / It looks complicated”). We pre-test two complementary narrative frames and three copy pillars before launch:

Narrative frames

- *“Bring it home”* — A neighbor, a small business, and a retiree each discover funds.
- *“It helps the community”* — Dollars returned to local churches, youth leagues, and volunteer fire departments.

Copy pillars

- **Trust:** “Administered by the West Virginia State Treasurer’s Office. No fee to claim.”
- **Simplicity:** “Search in under a minute; start your claim online.”
- **Urgency:** “Begin today—most claims only need a few documents.”

We run a 72-hour message and creative pre-test (paid social + small CTV/OLV sample) with West Virginia imagery and plain-language scripts. Success = lift in click-through to the search page, higher video completions on :15s vs. :30s, and positive trust cues in comments.

In the AKC national campaign (“Everything We Do, We Do for Dogs”), relatability was decisive: showing real people and familiar situations outperformed abstract claims. We used a :60 hero film on ABC’s AKC National Championship broadcast, then platform-specific :30/:15/:06 cut-downs that kept the emotional core while making the call-to-action unmistakable. We will mirror

that structure here: one unifying story about “bringing it home,” adapted to short-form units that perform on mobile and social without losing credibility or warmth.

3) Creative Checklist

Before allocating a dollar to broadcast or digital, we ship the trust layer and the action layer:

Trust layer: 30–45 second Treasurer’s Office explainer (voiceover + on-screen proof points), FAQ one-pager, “No fee to claim” badge system for all assets, and a newsroom kit (localizable press note + “big check” photo templates).

Action layer: a simplified landing experience (clear headline, search box above the fold, 3-step “what you’ll need”), short how-to video (:15/:30), and ADA-compliant creative templates for social, print, and OOH.

We saw higher engagement when the hero sentiment (“Everything We Do...”) was immediately followed by a clear next step in cut-downs (e.g., swipes, saves, or event RSVPs). For Unclaimed Property, every unit—broadcast, billboard, mailer—will close with the same, singular next step: “Search your name now at [program URL].”

4) Budget Alignment

We convert insights into a six-week allocation that balances **broad reach** with **measurable conversion**. Percentages below are illustrative; we’ll finalize after STO shares total funds and heat-map detail.

- **45% Awareness & trust** — Broadcast TV/radio (news & high-trust dayparts), CTV/OLV (:30/:15), and high-visibility OOH near DMVs, libraries, and government complexes.
- **30% Digital intent & conversion** — Paid search (“West Virginia unclaimed money”), social click-to-site, programmatic display, and retargeting for non-completers.
- **15% Direct mail to high-opportunity ZIPs** — Personalized mail with QR/vanity URLs for tracking (no third-party list resale; addresses drawn from STO’s privacy-compliant workflow or publicly available sources).
- **10% Contingency & optimization** — Mid-flight shifts based on performance (e.g., expand :15 OLV in counties where completion spikes; add an extra mail drop to a top-decile ZIP).

Efficiency guardrails: negotiated value-adds (bonus spots, ROS inventory), shared production across units (one hero shoot → multiple cut-downs, radio, and social), and county-weighted buys so high-balance/low-claim areas receive proportionally more impressions and mail volume.

AKC lesson applied. During AKC, short-form cut-downs consistently outperformed long-form on mobile, and event tent-poles produced predictable spikes. We’ll replicate that dynamic by anchoring the first two weeks in high-reach placements, then leaning into **short-form and direct-response** as search and claims accelerate—plus leveraging tent-pole PR moments (e.g., National Unclaimed Property Day, county “big check” events) to amplify without extra spend.

5) What we deliver at the end of Step 1

- **Audience & County Opportunity Brief** (personas, heat maps, message barriers).
- **Pre-test Findings & Go/No-Go Matrix** (which narratives/copy to scale).
- **Six-Week Media & Budget Plan** (channel mix by week, county weighting, flighting).
- **Creative Readiness Pack** (approved scripts/storyboards for :30/:15, print/OOH, social units; trust badges; FAQ one-pager).
- **Measurement Plan** (weekly KPIs: searches, verified claims, cost per claim; mid-flight optimization criteria).

We begin by meeting West Virginians where they are, and we earn their trust quickly. Then we make it easy to act. The AKC campaign proved that familiar, human scenes plus platform-right creative outperforms lecture-style messaging. We bring that same discipline here so every dollar in this six-week sprint moves people from “I’ve heard about it” to “I claimed it.”

Data and Analytics

At (amp), we believe that research and analytics are the foundation of great media strategy. A data-driven approach ensures that every media dollar is spent effectively, allowing us to optimize campaigns in real time and maximize ROI.

Media Analytics & Performance Reporting

Our team specializes in turning data into actionable insights. We utilize a combination of Google Data Studio, GA4, Tableau, and proprietary dashboard solutions to monitor and report on key performance metrics. Our team leverages data from these various sources to monitor key metrics such as:

- **Impressions:** The total number of times an ad is displayed, regardless of whether it is clicked.
- **Reach:** The number of unique users who have seen the ad.
- **Click-Through Rate (CTR):** The ratio of users who click on the ad to the number of total users who view the ad (clicks/impressions).
- **Conversion Rate:** The percentage of users who complete a desired action (e.g., filling out a form, making a purchase) after clicking on the ad.
- **Cost Per Click (CPC):** The cost incurred for each click on the ad.
- **Cost Per Acquisition (CPA):** The cost associated with acquiring a new customer through the ad.
- **Return on Investment (ROI):** The overall return generated from the campaign relative to the investment.
- **Engagement Rate:** The level of interaction (likes, shares, comments) that the ad receives on social media platforms.
- **Bounce Rate:** The percentage of visitors who navigate away from the site after viewing only one page.

- **Average Session Duration:** The average amount of time users spend on the website after clicking on the ad.

By tracking engagement, audience behavior, and conversion rates, we continuously refine campaign strategies to ensure optimal performance.

Performance Reporting

Our performance reporting is comprehensive and tailored to meet the needs of various stakeholders. We provide clear and concise dashboards that highlight key performance indicators (KPIs) and actionable insights. Our reports include detailed metrics on ad performance, audience engagement, and ROI, enabling clients to make informed decisions. We also offer regular updates and recommendations for ongoing optimization based on the latest data. Specific metrics include:

- **Key Performance Indicators (KPIs):** Specific metrics that align with the campaign's objectives, such as lead generation, brand awareness, or sales.
- **Audience Demographics:** Data on the age, gender, location, and interests of the audience engaging with the ads.
- **Engagement Metrics:** Detailed insights into how users interact with the ads, including likes, shares, comments, and video views.
- **Conversion Tracking:** Monitoring the actions users take after clicking on the ad, such as purchases, sign-ups, or downloads.
- **Attribution Models:** Understanding the customer journey and identifying which touchpoints contribute to conversions.
- **Call Tracking:** Measuring the effectiveness of ads in generating phone calls to the business.
- **Reporting Dashboards:** Visual representations of data that provide a clear overview of campaign performance, tailored for various stakeholders.
- **Data Visualization:** Graphs and charts that make complex data easy to understand and actionable.

Post-Buy Analysis

Post-buy analyses are a critical component of our media strategy. After the completion of a campaign, we conduct thorough evaluations to assess the effectiveness of the ads placed. This includes analyzing the reach, frequency, and impact of the media buys in relation to the campaign KPIs. We provide detailed data on the performance of each ad placement, including insights into audience demographics, engagement levels, and conversion rates. Our post-buy analyses help identify areas for improvement and inform future media strategies. Key metrics include:

- **Effective Frequency:** The optimal number of times a user needs to be exposed to an ad before taking action.

- **Ad Placement Performance:** Analysis of the effectiveness of different ad placements and platforms.
- **Audience Insights:** Detailed information on the behavior and preferences of the target audience.
- **Creative Performance:** Evaluation of how different ad creatives perform in terms of engagement and conversions.
- **Brand Safety:** Ensuring ads are placed in appropriate contexts and avoiding negative placements.
- **Campaign Reach and Frequency:** Measuring how many people were reached and how often they saw the ads.
- **Sales Lift:** The increase in sales attributed to the advertising campaign.
- **Customer Feedback:** Collecting and analyzing feedback from customers to understand their experience and satisfaction with the ads.
- **Return on Ad Spend (ROAS):** The revenue generated for every dollar spent on advertising.
- **Post-Campaign Surveys:** Gathering insights from surveys conducted after the campaign to measure brand recall and perception.

By leveraging these detailed metrics, (amp) can provide The State of West Virginia with comprehensive insights into the effectiveness of their media campaigns, ensuring alignment with their strategic goals and continuous optimization for better results.

4.2.1.4. Targeted Digital Advertising Campaign

Digital advertising is only effective when it feels personal. For the West Virginia State Treasurer's Office (STO), success requires more than placing ads online, it requires understanding who in the state needs to hear about each program, what motivates them to act, and how to build trust in the Treasurer's Office as a steward of their financial future. Our approach combines research-driven microtargeting, in-house creative production, and accountable reporting, ensuring every dollar translates into measurable public engagement.

Step 1: Audience Research & Segmentation

We begin by listening to the numbers and the people. West Virginia is home to just under 1.8 million residents, spread across rural counties, small towns, and urban hubs. Each Treasurer's Office program aligns with distinct life stages, financial needs, and community roles.

- **SMART529:** Parents of children under 18, particularly first-generation college households, who may feel college savings is "out of reach."
- **Hope Scholarship:** Families with school-age children, homeschool networks, and faith-based communities seeking affordable education options.
- **Unclaimed Property:** Older homeowners, retirees, small businesses, nonprofits, and civic groups who may unknowingly hold dormant funds.

- **WVABLE:** Individuals with disabilities, their families, healthcare providers, and advocacy organizations.
- **WV457 Retirement Plus:** State employees and municipal workers planning for retirement, as well as private-sector employers who can serve as advocates.

Our segmentation process integrates Treasurer's Office program data (claim rates, account balances, adoption trends) with third-party sources like the U.S. Census Bureau, MRI-Simmons, and Nielsen. For example:

Unclaimed Property: Counties such as Kanawha and Cabell show the highest unclaimed property totals, while rural counties like McDowell and Pocahontas show low claim activity.

SMART529: College enrollment rates in West Virginia lag the national average, particularly among rural, low-income households. That informs our targeting of parents and educators with financial literacy messages.

We supplement quantitative analysis with qualitative research: surveys, online panels, and community interviews. This approach echoes our work for the State of Kansas Department of Administration, where early-stage consumer research revealed barriers that guided campaign messaging.

Step 2: Hyper-Targeted Strategy Development

Microtargeting ensures messages land with the right people, in the right place, at the right time. Our targeting framework uses a layered approach:

- **Demographic & Life Stage:** Parents of school-age children (SMART529, Hope Scholarship); retirees aged 55+ (WV457, Unclaimed Property); caregivers of individuals with disabilities (WVABLE).
- **Behavioral & Intent:** Online searches for scholarships, savings plans, or "lost money WV"; engagement with local school and disability advocacy groups on Facebook.
- **Geographic:** County-level weighting based on program participation. For example, more Hope Scholarship dollars may be allocated to Cabell, Raleigh, and Monongalia counties where private schools are concentrated, while unclaimed property ads emphasize counties with high balances but low claims.
- **Community Networks:** Leveraging PTA groups, veteran associations, disability coalitions, and employer networks to extend digital reach through organic and trusted voices.

Storytelling brings the targeting to life. Instead of abstract financial terms, creative will highlight a parent in Charleston opening a SMART529 for their daughter's future, or a volunteer fire department in Fayette County receiving unclaimed funds that keep their trucks running. These narratives mirror our work with the American Kennel Club national campaign, where shifting from institutional branding to human-centered stories unlocked new engagement among younger audiences.



Step 3: Media Planning, Placement & Budgeting

Every dollar in a state campaign must work twice: once to build trust, and again to drive action. Our budget allocations balance broad awareness with precision targeting, reflecting West Virginians' actual media habits:

Paid Social Media (35–40% of spend):

Facebook and Instagram remain dominant in West Virginia, particularly among parents and retirees. TikTok is leveraged for younger families and students. LinkedIn reaches employers and state workers.

Case Parallel: In the American Kennel Club's *Everything We Do, We Do for Dogs* campaign, we deployed broadcast, Meta, TikTok, and event-based creative to engage a wide audience. The campaign demonstrated how familiar platforms can deliver important but complex messages—translating a 140-year-old institution's mission into content that felt approachable, trustworthy, and actionable.

Programmatic Display & Video (25–30% of spend):

Local news outlets (Charleston Gazette-Mail, MetroNews) and Connected TV platforms (Hulu, Roku, YouTubeTV) provide reach and credibility.

Evidence: Nielsen reports CTV adoption in West Virginia has grown by 18% in three years. This ensures broadcast-quality storytelling with digital targeting efficiency.

Search Marketing (15–20% of spend):

Google Ads capture high-intent queries like "WV unclaimed money" or "Hope Scholarship WV application."

Case Parallel: For Confluent Health, SEM drove measurable appointment bookings nationwide. STO can expect the same efficiency: every search ad connects directly to program enrollment or claims.

Direct Response Retargeting (10–15% of spend):

Visitors who engage but don't complete an action see follow-up creative (e.g., "Search your name today" for Unclaimed Property).

Evidence: Retargeting typically delivers 3–5x higher CTR than prospecting ads. In the Deep Eddy Vodka campaign, sequential retargeting was key to moving audiences from awareness to trial—boosting foot traffic by 17% and online conversions by 14%. This proves the efficiency of retargeting to convert initial engagement into meaningful action.

Optimization Reserve (5% of spend):

Held for mid-flight reallocations based on performance. For example, if Instagram Reels outperform static display for SMART529, spend can be shifted mid-campaign.



Like our AKC campaign, which phased national awareness through TV and then deepened engagement via social retargeting, STO's campaigns will start with broad trust-building and move toward precise, action-driven creative.

Step 4: Creative Development Aligned to Goals

Because all creative is produced **in-house**, STO benefits from cost transparency, consistency, and accountability. Our deliverables include:

- **Video:** Broadcast-quality :30 and :15 spots for CTV and social.
- **Social-first Content:** Stories, reels, and carousels with West Virginia-specific visuals and plain-language calls to action.
- **Display & Native Ads:** Simple, urgent messages tied to program goals (e.g., "Your savings start today").
- **Interactive Explainers:** Short how-to animations demystifying program steps like filing an unclaimed property claim or opening a WVABLE account.

We test creative before full rollout with A/B testing, ensuring resonance before scaling. This mirrors our process for the Belle of Louisville, where redesigned digital and print assets simplified ticketing and boosted donations—a reminder that design isn't just aesthetic, but functional.

Step 5: Tracking & Measurement

Measurement is accountability. For the West Virginia State Treasurer's Office, success is not just launching a campaign, it is proving that public funds translated into measurable impact. Every campaign we deliver ties directly to program KPIs, ensuring transparency and trust.

Defining Success from the Start

Before launch, we align each program's goals with quantifiable outcomes. For Unclaimed Property, that might mean claims initiated; for SMART529, new accounts opened; for WVABLE, increases in contributions from families with disabilities. By embedding KPIs into planning, we ensure that every creative decision and every media dollar is in service of measurable outcomes.

Tools & Methodologies

Our analytics team deploys a full stack of monitoring tools:

- **Google Campaign Manager 360** for impressions, reach, and frequency.
- **Meta Ads Manager** for real-time engagement, conversions, and demographic analysis.
- **Brandwatch & Meltwater** for social listening, sentiment tracking, and earned media pickup.
- **Custom STO dashboards** that consolidate performance across channels, tailored for weekly progress updates and quarterly reporting.

Sample KPIs by Program

- **Unclaimed Property:** Claims initiated, claims completed, website traffic lift, cost-per-claim.

- **SMART529 / Hope Scholarship:** New accounts opened, average contribution per account, FAFSA or scholarship application alignment.
- **WVABLE:** Account openings among eligible households, deposits per quarter, engagement from disability advocacy partners.
- **WV457 Retirement Plus:** Employer adoption rates, employee participation rates, contribution growth year-over-year.
- **Financial Education ("Get A Life"):** Classroom sessions delivered, student participation, teacher satisfaction surveys, parent awareness via follow-up.

Mid- and Post-Campaign Assessments

Accountability also means course correction. We build mid-campaign reports into every project, enabling us to shift dollars toward the best-performing channels and creative. Post-campaign, we provide comprehensive reports within 45 days that include:

- Media performance (reach, impressions, CPM, CTR).
- Conversion metrics tied to program KPIs.
- Demographic and geographic participation insights.
- ROI analysis comparing dollars spent to actions taken.
- Recommendations for sustaining awareness after the campaign window.

Why This Matters for STO

In a public sector context, measurement builds trust, not only with leadership but with West Virginians who expect transparency. Our campaigns are not judged by vanity metrics; they are measured by real outcomes that change lives: a family recovering long-lost savings, a student opening their first college account, an individual with disabilities building financial independence.

Sample Deliverables

- Custom reporting dashboards (weekly updates).
- Mid-campaign performance memos with optimization recommendations.
- Final post-campaign report (45 days post) including KPI achievement, lessons learned, and actionable next steps.

What Success Looks Like

- A measurable increase in claims filed through the Unclaimed Property Division.
- Growth in SMART529 accounts aligned with school enrollment cycles.
- Expanded WVABLE participation among underserved households.
- Retirement Plus contributions rising as more employers adopt.
- Financial education programs reaching new counties and classrooms.

In short, success is not claimed, it is proven. Measurement ensures STO can demonstrate both stewardship of taxpayer dollars and life-changing outcomes for West Virginians.

Case Study: True Food Kitchen Expansion Campaign

When True Food Kitchen, a healthy dining brand with 43 locations, secured a \$100 million private-equity investment, the mandate was clear: deliver measurable growth, quickly and sustainably. The challenge mirrored what the Treasurer's Office faces—proving that every dollar spent produces real, trackable outcomes that build long-term trust and participation.

Research & Insight Development

Our team began by mapping audience behaviors in core markets. Insights showed that while awareness of True Food Kitchen's brand was low, resonance was high once customers experienced the connection between wellness and flavor. The communications challenge was bridging that awareness-to-action gap, much like STO must do with Unclaimed Property, SMART529, or WVABLE.

Targeting & Media Strategy

We developed a dual-campaign approach:

- **Plus-Up Summer Campaign** in key markets like Austin, TX and Los Angeles, CA using Meta, Google Ads, YouTube, TikTok, and iHeartRadio to drive foot traffic and online orders.
- **Always-On Nationwide Campaign** maintaining visibility in all other markets with paid search and video content.

AI-driven ad units, localized targeting, and seasonal message variations ensured efficiency.

Execution & Optimization

Through real-time dashboards and continuous optimization, we shifted budget to high-performing channels, adjusted messaging during payment outages, and adapted strategy in response to Hurricane Hilary disruptions. This adaptive approach mirrors how STO campaigns will include mid-flight adjustments and scenario planning.

Results & Outcomes

- **+255.8% increase in in-store visits**
- **Sustained 3.67–3.78 ROAS** across months
- **Improved online order conversions** and long-term sales growth
- **1M+ users reached** across channels, with targeted engagement driving trial and loyalty

Just as True Food Kitchen turned investor funding into tangible outcomes, STO campaigns must translate public investment into measurable community impact. By embedding KPIs, continuous optimization, and real-time reporting into every campaign, we ensure outcomes like claims filed, accounts opened, and applications completed are not just promised but proven.

What STO Gains

- **Unified Storytelling:** One Treasury voice, tailored to each program.

- **Cost Transparency:** All creative and placements managed in-house—no subcontractor markups.
- **Local Resonance:** Ads grounded in West Virginia-specific research and community narratives.
- **End-to-End Accountability:** From strategy through reporting, every step is tied to STO's KPIs.

Involving STO in Finalizing Plans

A campaign is strongest when the agency is not just a vendor, but a collaborator. For the Treasurer's Office, that means plans will never be handed over as a finished product—they will be shaped, tested, and finalized in partnership with STO program leads.

We build that collaboration into every stage:

1. Co-Creation Workshops

At the close of research and initial strategy, we convene working sessions with STO staff to review insights, proposed targeting, and media allocations. These are not presentations but working documents—STO staff will see multiple audience models, messaging directions, and budget scenarios side by side. Together, we refine priorities to ensure operational realities (e.g., Hope Scholarship application cycles, WVABLE's ABLE Savings Day, SMART529's Bright Babies outreach) are reflected in the media calendar.

2. Transparent Scenario Planning

Budgets are presented in Good/Better/Best scenarios, with clear trade-offs in reach, frequency, and projected outcomes. An integrated "One Treasury" option is also modeled. STO chooses not just the budget level but the emphasis—whether more dollars go to rural outreach, employer partnerships, or statewide broadcast. This ensures agency leadership has visibility into how funds are being stewarded.

3. Creative Alignment Reviews

Before final asset production, STO staff review and approve mood boards, narrative concepts, and draft creative. Calls-to-action and key messages are tested with sample audiences, but the final say rests with STO. For instance, if stakeholder review shows that "claim tents" messaging for Unclaimed Property should emphasize security over speed, we pivot before production.

4. Mid-Campaign Adjustments with STO Input

At the midpoint, we present optimization memos with multiple scenarios for reallocation—what happens if we double down on streaming, or pivot to search in underperforming counties? STO staff choose the scenario that aligns best with program priorities.

5. Final Sign-Off

No campaign launches without written STO approval. Every media buy, targeting plan, and creative execution is finalized only after STO staff confirm alignment with program goals.

Digital Marketing & Analytics Capabilities

At (amp), our digital team is built to drive performance through precision targeting, real-time optimization, and data-driven insights. With decades of experience across verticals and a track record of maximizing ROI, our digital capabilities extend far beyond execution—we operate as strategic partners who help brands navigate an ever-evolving media landscape.



Established Strengths in Digital Media

We have deep expertise in building and executing full-funnel digital strategies that include:

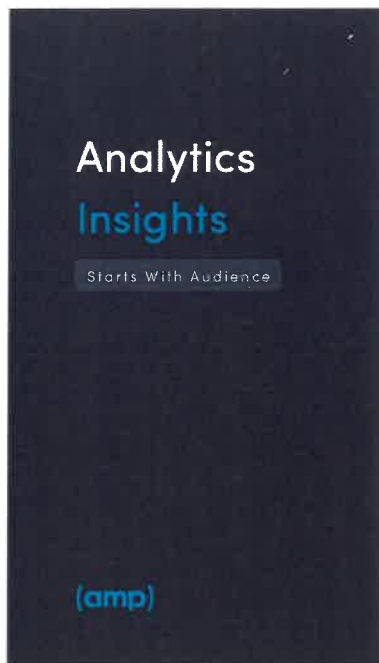
- **Programmatic Display & Video:** We leverage a mix of demand-side platforms (DSPs) and direct publisher buys to deliver high-impact display and video ads with strategic targeting and efficient CPMs.
- **Social Media Advertising:** From Meta and TikTok to Snapchat and LinkedIn, our team creates and optimizes paid social campaigns tailored to channel behaviors and performance trends.
- **Search Engine Marketing (SEM):** Certified across platforms like Google Ads and Microsoft Ads, our paid search strategies are highly optimized for conversion, using advanced techniques like audience layering, dynamic search ads, and real-time bid adjustments.
- **Streaming & CTV:** We deliver audience-first plans that integrate digital video into over-the-top (OTT) and connected TV (CTV) environments, providing the scale of traditional TV with the targeting of digital.

- **eCommerce Media Strategy:** For DTC brands, we build digital ecosystems that include Amazon media, shoppable social integrations, and retargeting strategies to reduce cart abandonment.

Analytics & Performance Measurement

Our analytics team ensures that every campaign is measured, attributed, and optimized for success. From custom dashboards to real-time reporting, we give clients full transparency into media performance and investment impact.

- **Conversion Tracking & Attribution:** We implement tracking frameworks that tie ad exposure to meaningful on-site actions—including e-commerce transactions, lead generation, or form fills.
- **Data Integration:** We centralize media performance data across channels (including offline) to provide a holistic view of ROI.
- **A/B & Multivariate Testing:** From creative formats to landing page experiences, we run continuous testing to drive incremental gains.
- **Media Mix Modeling:** For enterprise accounts, we offer econometric modeling to better understand long-term media impact across channels.



(amp's) full funnel approach to marketing is represented in our reporting and identification of testing opportunities.

We dive deep into attribution modeling and lead scoring to analyze which targeting and messaging delivered the highest value customer.

What You Get

- Custom Monthly & Quarterly Reports
- Dashboard
- Strategic Learnings
- Analysis
 - Industry and historical benchmarks
 - Conversions
 - Lead Quality
 - Experiments

Synthesizing data collected from multi-touch attribution modeling, enhanced analytics, on-SERP and off-SERP behavior into a clear story with real-time optimization recommendations and budget pacing insights.

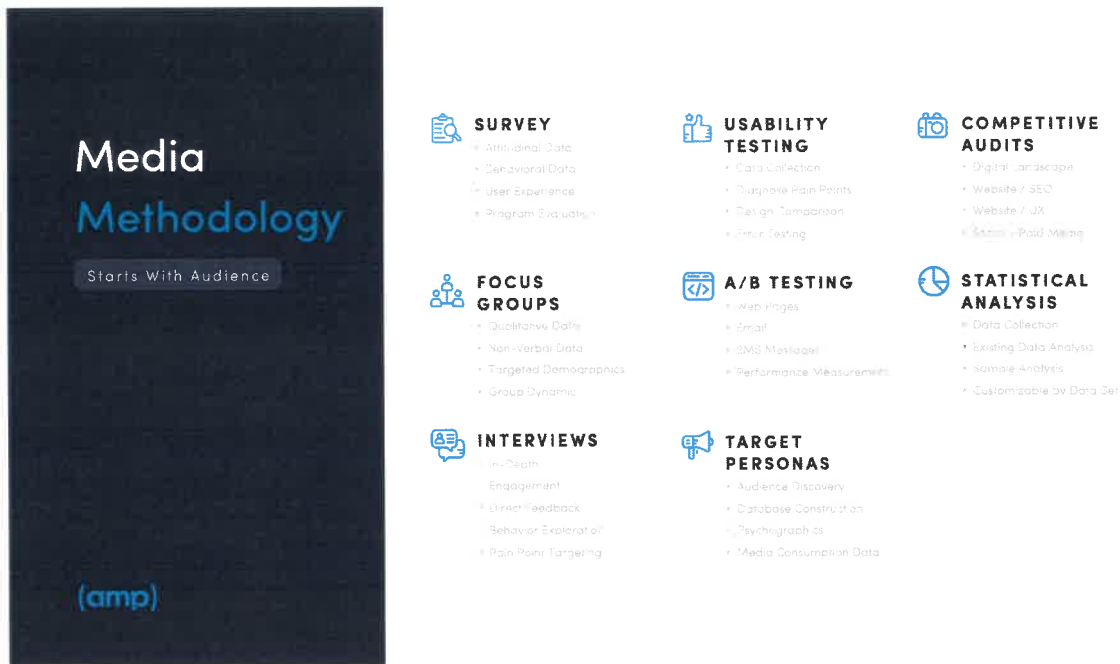
Primary Research: Our Strategic Advantage

Our in-house research team, staffed by PhD-level anthropologists and seasoned strategists, conducts custom primary research tailored to each client's goals. These efforts go far beyond



off-the-shelf audience data, giving us a deeper, more actionable understanding of who our audiences are, how they think, and what motivates them. Capabilities include:

- **Primary Research Capabilities:** Custom Surveys (national or regional), Focus Groups and 1:1 Interviews, Ethnographic and Observational Research, Message and Concept Testing, Usage & Attitude Studies, Segmentation and Persona Development
- **Audience Research & Segmentation:** We use behavioral, attitudinal, and demographic data to define high-impact audience profiles.
- **Message Testing:** We identify the creative and messaging that resonates most through qualitative and quantitative methods.
- **Brand Tracking & Sentiment Analysis:** Post-campaign, we measure brand health, lift, and audience perception to gauge success beyond clicks and impressions.
- **Market & Competitive Intelligence:** We provide landscape analyses that uncover white space and competitive opportunities.



Digital Team Credentials

Our certifications aren't just logos — they're proof of our performance, expertise, and ongoing commitment to excellence. We've earned these distinctions by consistently delivering results and staying at the forefront of media strategy and platform innovation.

Certifications:



PREMIER Google Partner

As a certified Google Partner, we have exclusive access to beta features, priority support, and advanced insights that help us build smarter, high-performing campaigns across Search, Display, YouTube, and more. Our team meets Google's rigorous standards for performance, best practices, and client success.

Meta Business Partner

As a Meta Business Partner, we're trained and trusted by Meta to deliver campaigns that convert across Facebook, Instagram, Messenger, and WhatsApp. From advanced pixel implementation to creative optimization and A/B testing, we leverage Meta's tools and resources to help brands drive meaningful engagement and real results.

Microsoft Advertising Partner

Being a Microsoft Advertising Partner means we're equipped to help clients tap into high-value audiences across Bing, Yahoo, AOL, and the Microsoft Audience Network. We stay ahead with unique targeting capabilities and platform support that give our clients an edge—especially where competition is less saturated.

Why It Matters

- **Certified Talent:** Every platform certification is earned by individuals on our team who complete rigorous training and maintain best-in-class performance.
- **Strategic Access:** We get early feature releases, platform updates, and support channels that non-partner agencies simply don't.
- **Proven Results:** Our campaigns consistently exceed benchmarks for reach, efficiency, and conversion — because we combine human insights with platform intelligence.

4.2.2. Mandatory Project Requirements

Mandatory Requirements Compliance

The State Treasurer's Office manages programs that directly affect the financial well-being of West Virginians, returning more than \$40.6 million in unclaimed property in FY2025, overseeing \$8+ billion in pooled funds through the Board of Treasury Investments, and stewarding savings programs like SMART529 (ranked among the top 529 plans nationally) and WVABLE, which empowers individuals with disabilities. These programs touch every community in the state, and with that responsibility comes a mandate for transparency, accountability, and trust.

(amp) not only meets the mandatory requirements outlined in Sections 4.2.2.1–4.2.2.5, we exceed them. Below, we describe our compliance while illustrating how our processes and experience directly align with the Treasurer's mission.

4.2.2.1 – Weekly Progress Updates

- **Why It Matters to STO:** Weekly updates give STO leaders confidence that every dollar—whether spent promoting unclaimed property or encouraging new 529 accounts—is used effectively and transparently.
- **Our Approach:** For municipal clients like the City of Fort Worth, we provide structured weekly updates with campaign pacing, creative deployment schedules, and early performance insights. For example, a weekly update that identifies underperformance in a community radio buy; we quickly reallocate spend to digital video, restoring efficiency mid-flight.
- **How We Exceed:** Beyond weekly updates, STO staff will have access to real-time dashboards that show spend pacing, reach, and conversions (e.g., accounts opened or claims submitted). This provides continuous visibility, not just weekly snapshots.

4.2.2.2 – Mid-Campaign Assessment

- **Why It Matters to STO:** Programs like the *Hope Scholarship* depend on specific enrollment windows. A mid-campaign check ensures outreach is on track to reach eligible families before deadlines.
- **Our Approach:** For **Georgia Southern University**, we developed mid-campaign reports that identify gaps in student inquiries. Based on that data, we shift spend from static display to streaming TV and SEM, resulting in stronger application numbers before deadlines closed.
- **How We Exceed:** We don't just provide assessments; we offer scenario modeling that shows STO what outcomes might look like if spend is shifted, creative refreshed, or channels expanded. This helps STO make proactive, data-informed decisions rather than reactive adjustments.

4.2.2.3 – Post-Campaign Report within 45 Days

- **Why It Matters to STO:** Accountability is central to programs like *Unclaimed Property*, where residents expect results and the legislature demands clear reporting.
- **Our Approach:** For the City of Fort Worth, we delivered post-campaign reports within 30 days that included performance metrics, demographic reach, and community engagement outcomes. These reports guided future task orders and built a cumulative record of success.

How We Exceed: Our post-campaign reports go deeper:

- **Attribution modeling** shows how impressions translate into measurable actions (e.g., scholarship applications or unclaimed funds returned).
- **Qualitative insights** from surveys and focus groups add depth, helping STO understand *why* campaigns succeed.
- **Forward-looking recommendations** ensure each campaign strengthens the next.

4.2.2.4 – Written Approval for Creative Materials

- **Why It Matters to STO:** With programs as sensitive as *WVABLE* or *Retirement Plus*, accuracy and compliance are non-negotiable. Written approvals protect both the STO and the public.
- **Our Approach:** In regulated industries like Republic Bank, we follow strict approval protocols: no media assets are ever placed without written client sign-off. This process ensures compliance with industry regulations while still enabling campaigns to launch quickly, maintaining both accountability and efficiency.
- **How We Exceed:** To streamline STO's review process, we use an online approval platform where creative can be reviewed, commented on, and approved in one place. This reduces delays, preserves an audit trail, and keeps campaigns moving without sacrificing oversight.

4.2.2.5 – Ad-Hoc Meetings with STO Staff

- **Why It Matters to STO:** Financial programs are subject to sudden changes—whether legislative updates to the Hope Scholarship or urgent pushes for unclaimed property claim events. Quick access to agency partners ensures STO can respond in real time.
- **Our Approach:** Our account teams are built for accessibility. For True Food Kitchen's national expansion campaign, we pivoted media within hours when unforeseen disruptions occurred—including payment outages and Hurricane Hilary—to keep campaigns aligned and performing. For STO, this means ad-hoc meetings and fast pivots are built into our workflow.
- **How We Exceed:** We assign a dedicated Account Director and Project Manager to STO, supported by rapid-response protocols. This ensures that if STO needs same-day adjustments, the strategist, buyer, and analyst are aligned immediately—no delays, no hand-offs.

Ongoing Obligation to Disclose Changes

- (amp) is privately held, independently owned, and has no pending contracts to merge or sell any portion of the firm. We recognize the obligation to disclose any future changes that could affect our qualifications and commit to notifying STO promptly of such changes.

Conclusion

Meeting the mandatory requirements is about more than compliance, it's about honoring the trust West Virginians place in the Treasurer's Office. (amp) brings processes built for transparency, examples that prove agility, and innovations that go beyond the baseline. Whether it's weekly dashboards that let STO see progress in real time, scenario modeling to ensure deadlines are met, or rapid-response protocols for legislative shifts, our goal is to ensure that every program—from *SMART529* to *Unclaimed Property*—is not only communicated but embraced.

4.3. Qualifications and Experience

Qualifications and Experience

(amp) brings over 25 years of experience designing, executing, and measuring large-scale media and outreach campaigns for government agencies, nonprofits, and national brands. Our qualifications extend beyond baseline compliance—we combine certified expertise, a fully in-house staffing model, and a proven record of success on projects of comparable scale and complexity.

For information on staffing structure and staff qualifications, please see the detailed staffing criteria provided in the relevant sections of this proposal. What follows are selected case studies and references that demonstrate our capacity to deliver campaigns similar to the scope requested in this RFP. Each example includes the project location, scope, objectives, and outcomes, along with the staff leadership who directed the work.

These case studies illustrate how we solve the same kinds of challenges faced by the West Virginia State Treasurer's Office: building trust in complex financial programs, reaching diverse statewide audiences, and delivering measurable outcomes that support long-term policy goals.

Relevant Experience

Our experience spans diverse industries, with a particular focus on municipal media and placemaking initiatives. We have successfully collaborated with cities and public entities to highlight their unique characteristics while aligning with their strategic goals. Some of our notable projects include the follow current & past clients:

- **City of Fort Worth:** Recently awarded and have partnered with the City of Fort Worth Environmental Services Department to deliver strategic, equity-focused marketing and outreach services that elevate community engagement across digital, print, and in-person channels to encourage recycling, prevent littering, and protect the environment . Through a task-order-based contract, we will develop and implemented creative campaigns, educational materials, and culturally inclusive content that supported the City's environmental initiatives and reinforced public awareness of key sustainability goals until 2029.
- **Hamilton County Public Health Department:** Played a key role in launching Michelle Obama's *Let's Move!* campaign in Cincinnati and Hamilton County, Ohio, promoting healthier foods in schools, community gardens, and safe parks. Through a multi-channel strategy—including TV, radio, digital, OOH, and interactive tools like GIS mapping and a dedicated website—the campaign successfully engaged the community and empowered families to embrace a healthier lifestyle.
- **Town of Gilbert Office of Economic Development:** (amp) partnered with the Town of Gilbert Office of Economic Development to develop and execute a data-driven, multi-channel media strategy designed to elevate Gilbert as a premier destination for business, talent, and innovation. Our work included strategic media planning, precision

audience targeting, and cross-platform media buying—combined with curated publisher partnerships that brought Gilbert’s story to life across high-impact channels. The result was a highly efficient campaign that increased brand awareness, deepened engagement with key audiences, and supported the town’s broader goals of economic growth and community development.

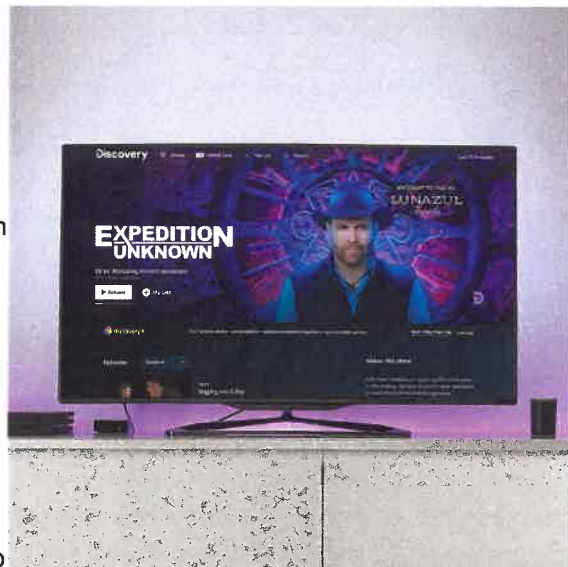
- **State of Kansas Department of Administration:** Partnered with the State of Kansas Corporation Commission to provide consumer and market research services, conducting surveys, focus groups, interviews, and in-depth qualitative and quantitative analysis. Our insights supported various state divisions by delivering data-driven strategies tailored to specific projects and audience needs across Kansas.

In addition to our municipal and public sector work, (amp) has extensive experience partnering with commercial clients across various industries. Our ability to create compelling, market-driven brand strategies has helped businesses enhance their market presence, improve customer engagement, and drive long-term growth. Below, we highlight ten key projects that showcase our capabilities in reaching both metropolitan and hard-to-reach rural areas, with tailored tactics based on demographics and interests to maximize engagement.

Case Studies

Lunazul Tequila Campaign, Heaven Hill Brands

- **Project Value:** \$3,883,800.00
- **Project Completion:** 04/30/2022
- **Location:** National Campaign
- **Scope:** When Lunazul came to (amp) with their estate-bottled tequila, they had 250 years of tradition but little recognition among the fast-growing audience of tequila drinkers. They had big goals to raise awareness, brand recognition and overall sales while also elevating the smooth-drinking spirit to a premium consideration in consumers’ minds. From consulting, strategy and media planning to an omni-channel creative campaign that leveraged micro-influencers, premium partnerships and geotargeting, (amp) helped deliver year after year of record growth and establish Lunazul as a premium tequila. By the time we completed our brand refresh, we had taken Lunazul from a bottom-shelf afterthought to a top-of-mind consideration, prominently featured on the coveted third shelf alongside other premium brands. We helped Lunazul achieve a **140% in-store sales increase, a 400% increase in share of voice, and a 57.9% increase in brand lift.**





Unskippable video content our audience couldn't miss (or ignore)

Our creative team completely revamped the Lunazul brand and website and created a bold new campaign called "Feed the Wolf." Then, our media team carefully crafted a media plan to ensure our campaign reached, resonated with and engaged our target audience. Through a strategic mix of video placements, we were able to not only increase awareness and drive our target audience to the new website, but also elevate their perception of the Lunazul brand by purposefully placing our videos on premium networks that aligned with our audience's interests, such as Discovery and Hulu. We augmented that targeted approach with high-frequency video buys that reached a broader audience on social and streaming networks to increase awareness and made the ads more memorable by creating an interactive experience. Through advanced TV placements, we incorporated geotargeted store locators at the end of videos so that viewers could instantly find nearby stores where they could buy Lunazul.

Feeding a wolf pack hungry for more social content

We then amplified the "Feed the Wolf" campaign on Lunazul's owned social channels, efficiently increasing reach and recall on placements that are endemic to the campaign. As an integral part of our overall digital marketing strategy, our series of social campaigns provided a strategic mix of content: product-focused posts designed to educate and drive awareness, "Feed the Wolf" campaign videos and images to increase brand recognition and drive sales, and user-generated content from our concurrent influencer campaign to create deeper engagement with our audience.

Influencer campaigns designed to create passionate brand advocates

To further amplify the "Feed the Wolf" campaign, we wanted to seek out those who were truly living the adventurous Lunazul lifestyle. We found a treasure trove of micro-influencers, from foodies and travelers to those who were proud wolf owners. They ranged from full-on pros to amateur hopefuls, but they all had the passion that makes for the best content creators. We succeeded in harnessing that passion to expand into this new alternative media opportunity.

Discovering a media partnership that could amplify our media spend in a major way

Then, we embarked on a more ambitious partnership adventure: "A Toast to Tradition." Led by influencer and cocktail enthusiast Josh Gates, the video series took viewers behind the scenes of the Lunazul distillery to highlight the brand's family heritage. Not only did the series elevate the brand in viewers' minds, but it was also wildly popular, generating **more than 366 million impressions, nearly 20,000 social engagements and more than 76,000 visits** to the custom landing page. Lunazul brand awareness jumped from 10.7% to 16.2% while consideration increased from 11.8% to 16.5% – **7.8 times better than Meta's own CPG benchmarks!** Today, we continue to drive awareness, increase conversion and elevate the Lunazul brand within a premium category. We'll certainly drink to that.

Key Contributions:

- **Ruby Dewitt** (Vice President of Media): Spearheaded the overall media strategy and played a pivotal role in selecting the best media channels for the campaign. Ruby ensured that traditional and digital media were seamlessly integrated, and was crucial in overseeing the cross-platform media execution.
- **Molly Kennedy** (Senior Media Manager): Managed day-to-day media planning and ensured campaign execution was smooth across multiple channels, contributing to its success.
- **Shane Doyle** (Senior Art Director): Developed and executed the creative direction for the campaign, ensuring visual consistency and brand alignment across digital platforms.
- **Andrea Renzi-Burns** (Senior Media Planner): Led media buying efforts and optimized placements to maximize ROI, contributing to the campaign's successful reach.

Deep Eddy Vodka Ruby Red Campaign

- **Project Value:** \$3,242,279.00
- **Project Completion:** 04/30/2021
- **Location:** National Campaign
- **Scope:** Inspired by the spirit of Deep Eddy Pool in Texas, Deep Eddy® Vodka was created so you could grab a bottle with friends and enjoy good times that never seem to end.

The brand is well known for its flavors, and according to Nielson, Deep Eddy Lemon is the #1 Citrus Vodka, Deep Eddy Ruby is the #1 Grapefruit Vodka and Deep Eddy Lime ranked #1 as the fastest growing flavored vodka just two and half months after launch.



However, the Deep Eddy Original Vodka, which is handcrafted in small batches in Austin, Texas, is a challenger brand to the more well-known Austin brand, Tito's Vodka. With a national brand budget that is less than a tenth of its main competitor, Deep Eddy Vodka challenged (amp) to capitalize on the success of its flavors to build overall brand awareness, amplify its Core 3 products, and encourage trial.

Deep Eddy's target audience is men and women living in the U.S. between the ages of 25-39 who enjoy spending time with friends in the outdoors while listening to music. (amp) deployed an omni-channel campaign that asked consumers to Pick Something Real – through digital activations that included video, audio, web and mobile, custom content, social media, and influencers to build brand awareness.

We leveraged frequency and ad sequencing to build engagement with its popular flavored products and then introduce the Original Vodka. We also used full-funnel lifecycle tracking to drive users to convert online via delivery apps or visit their nearest retailer where we tracked walk-ins. Plus, we used social amplification and retargeting to surround the brand's local, regional, and national music festival and event sponsorships to encourage trial of the key products.

This targeted approach to the campaign allowed Deep Eddy to maximize its ad dollars by efficiently reaching new consumers at scale, but also allowing them to self-qualify through brand engagement which drove down overall CPA and increased ROAS. At the end of the campaign, we saw an impressive 17% increase in foot traffic to Deep Eddy Vodka's retailers, 14% increase in website conversions, which included orders from select delivery apps, and an incredible 40% increase in sales – certainly results worth celebrating.

Key Contributions:

- **Ruby Dewitt** (Vice President of Media): Directed the media strategy and ensured that the media buys aligned with Deep Eddy Vodka's goals for maximizing exposure across key platforms. Ruby was integral to optimizing the media budget and maximizing reach across digital and traditional channels.
- **Todd Krise** (Director of Account Strategy): Oversaw the strategic planning and integration of media and creative direction, ensuring that the campaign resonated with its target audience.
- **Molly Kennedy** (Senior Media Manager): Executed media buys across various platforms, tracked campaign progress, and ensured the strategic goals were met through optimized placements.
- **Shane Doyle** (Senior Art Director): Designed the creative assets for digital and broadcast media, ensuring the visuals were aligned with the brand's identity and engaging for the audience.

4. Hershey's Chocolate World Billboard Campaign in Times Square



- **Project Value:** \$426,244.00
- **Project Completion:** 08/2022
- **Location:** New York City, New York
- **Scope:** The Hershey's Chocolate World Times Square campaign sought to capitalize on the massive holiday foot traffic in Times Square, aiming to increase visibility and drive traffic to the store located beneath the iconic digital billboard. The strategy centered on deploying visually compelling, animated videos on the massive digital screens in Times Square, designed to highlight Hershey's products and draw attention to the store below. These animations not only

showcased popular Hershey products but also provided clear directions to guide viewers into the store, enticing them with a variety of holiday-themed offerings.

To ensure the campaign reached the right audience, the team conducted qualitative analysis and identified distinct patterns in tourist behavior throughout the day. Using geo-location targeting, they delivered digital ads to tourists arriving in New York City, making sure the campaign effectively reached potential customers. The integration of outdoor advertising with digital media created a seamless connection between the physical and online experiences, helping to boost brand awareness among both tourists and locals.

In addition to the billboard's high-visibility placement, social media amplification played a crucial role in extending the campaign's reach. By collaborating with media amplification experts, short video clips from the Times Square digital billboard were optimized for social platforms, increasing engagement among families who were looking to create holiday traditions. The social media strategy was designed to maintain the campaign's momentum and further drive awareness of Hershey's Chocolate World as a top holiday destination.

Inside the store, the experience was amplified by matching in-store videos with the content from the Times Square billboard. These videos were placed strategically to continue the narrative, directing customers to purchase holiday-themed treats and explore exclusive in-store experiences. This seamless integration between outdoor advertising, social media, and the in-store experience ensured that the campaign provided a cohesive and engaging brand experience from start to finish.

As a result, the campaign led to a significant increase in sales, with a 103% rise in sales of featured items and a 16% increase in overall sales compared to the previous year. The digital components of the campaign were particularly successful, reaching 720k people with a \$5.83 CPM, exceeding the campaign goals. Engagement rates were also strong, with 75k engagements and a 10.4% engagement rate, nearly double the goal. This innovative approach helped reinforce Hershey's position as a go-to holiday destination for tourists, proving the power of integrated, multi-platform campaigns.

Key Contributions:

- **Ruby Dewitt** (Vice President of Media): Led the integration of digital out-of-home advertising with social media campaigns. Ruby ensured that the digital billboards were strategically placed to increase foot traffic while complementing the social media efforts.
- **Jordan Turner** (Senior Director of Media): Managed the campaign's overall strategy and execution, ensuring a seamless connection between digital billboards and social media advertising. Jordan coordinated the media buying strategy to ensure maximum visibility.
- **Molly Kennedy** (Senior Media Manager): Managed the social media content and engagement, ensuring that the campaign created buzz and effectively drove traffic to the store in Times Square.
- **Shane Doyle** (Senior Art Director): Developed creative assets for the billboard and social media platforms, making sure the visual identity of Hershey's Chocolate World was clearly communicated across various channels.

5. Scalable Digital Growth for Confluent Health

Confluent Health, a leading provider of physical therapy and occupational health services, sought to expand its online presence and educate patients about its extensive network of partner clinics nationwide. With a diverse mix of small, medium, and large markets to reach, they turned to (amp) to craft a scalable digital strategy that would drive awareness and engagement.

We developed a robust search engine marketing (SEM) program tailored to Confluent Health's unique needs. Our approach ensured flexibility, allowing campaigns to be easily replicated and adjusted to suit different market sizes. We optimized content to enhance discoverability, implemented targeted ad strategies to attract new patients, and streamlined the digital experience to increase conversions.

The results spoke for themselves. Our SEM efforts improved search rankings across multiple locations, significantly boosting online appointment bookings. By optimizing keyword strategies and leveraging geo-targeted campaigns, we drove higher engagement from both prospective and returning patients. This strategic approach positioned Confluent Health as the go-to provider in physical therapy, strengthening its digital footprint and connecting more patients to the care they need.

CASE STUDY

Confluent Health

SERVICES | Google Ads

Confluent Health hired us to increase its online presence by educating current and potential patients on its products and services across dozens of national partner locations. (amp) developed a search engine marketing program that can be replicated and scaled to meet the demands of small-, medium-, and large-sized markets.



+99%

Increase in web traffic

+113%

Increase in conv. rate

+59%

Increase in new visitors

EXPERTS



6. Financial Services Campaign for Republic Bank

Republic Bank aimed to increase its presence in the business, personal, and mortgage sectors across five key markets: Tampa, Cincinnati, Nashville, Louisville, and Lexington. They partnered with (amp) to achieve this goal.

Our team worked closely with Republic Bank to frequently update their website, ensuring their services and competitive rates were always current. We deployed an omni-channel campaign

that included social media, digital ads, and custom content. Our strategy positioned Republic Bank as a leader in the industry and boosted their search results.

The campaign delivered remarkable results. Impressions increased by 231%, conversion rates by 134%, and overall conversions by 227%. Republic Bank's enhanced digital presence solidified its reputation as a top financial institution in the targeted markets.

CASE STUDY

Republic Bank

SERVICES | Google Ads

Republic Bank teamed with (amp) to increase its presence in the business, personal, and mortgage sectors across five key markets: Tampa, Cincinnati, Nashville, Louisville, and Lexington. Our teams work extremely close when it comes to website updates, making sure Republic Bank's services and competitive rates are updated frequently to position it as a leader in the industry, as well as in search results.



+231%

Increase in impressions

+134%

Increase in conv. rate

+227%

Increase in conversions

EXPERTS



7. Community Engagement Campaign for U-Pull-&-Pay

CASE STUDY

U-Pull-&-Pay

SERVICES | Creative - Google Ads - Social Media Ads - SEO - OOH - SMS

UPAP was lost in a "sea of sameness" when they approached us to help increase their on-site and off-site visibility, consideration, and conversions. (amp) deployed a full-funnel search, social, and loyalty strategy for 13 distinct locations - allowing us to tie 25% of in-store visits to marketing initiatives.



+517%

Increase in on-site conversions

+330%

Increase in SMS customer acquisition

+14%

Increase in sales

EXPERTS



Rebuilding a car is a lot like rebuilding a brand. U-Pull-&-Pay, the underdog of the junkyard industry, needed a breakthrough communication strategy to boost in-store visits and ad engagement. (amp) stepped in to drive this transformation.

We conducted audience research to gain human insights and developed a comprehensive strategy powered by brand planning, analytics, and creative. We re-launched U-Pull-&-Pay's website, providing resources to boost brand affinity and loyalty. Our national "Keep the Drive Alive" campaign, with traditional and digital elements, created an emotional connection with customers. We also launched a successful recruitment campaign, attracting a record number of applicants.

The results were impressive. Non-paid Facebook traffic increased by 35% year-over-year, ad recall lift rate increased by 431%, and 112% of paid store shoppers saw digital marketing prior to visiting. We took U-Pull-&-Pay from zero to sixty, making the junkyard cool and sexy.

8. Event Lead Generation Strategy for Pinstripes

Pinstripes, an emerging challenger brand in the "eater-tainment" space, offers a unique mix of high-end bowling, indoor/outdoor bocce, and 4-star Italian cuisine. While the brand had seen strong engagement across its gaming and dining verticals, it faced a challenge in generating event leads during the summer months. Pinstripes partnered with LEAP to refine its approach and improve lead generation for social and corporate events.

Our team began by analyzing Pinstripes' business model and identifying key opportunities for improvement. We refreshed their digital creative to better reflect the excitement of the Pinstripes experience and developed a strategic, seasonally focused media plan. This included geographically tailored campaigns that emphasized indoor entertainment in hot southern climates and custom messaging designed to resonate with different audiences.

By continuously optimizing campaigns and making real-time adjustments, we helped Pinstripes better engage with potential customers, ensuring their event spaces remained a go-to destination year-round. Our strategic approach strengthened Pinstripes' position in the market and enhanced their ability to capture leads during critical booking periods.

CASE STUDY

Pinstripes

SERVICES | Media Strategy, Digital Marketing, Creative

Pinstripes partnered with LEAP to enhance lead generation for their events during the historically slower summer months. By refreshing digital creative, refining strategy, and introducing seasonal value propositions tailored to different markets, our team optimized campaigns to drive engagement. With real-time adjustments and an always-on approach, we helped position Pinstripes as a top choice for social and corporate gatherings, ensuring their venues remained a go-to destination year-round.

+38%
events revenue

+33%
event leads

+50%
booked events
from leads



EXPERTS
G 00 d i u y

9. Banking on Champions - How (amp) Elevated UMCU's Digital Presence in Michigan Sports

The University of Michigan Credit Union (UMCU) is deeply embedded in the sports community, serving as the official mortgage partner and exclusive auto loan provider for the University of Michigan football team, as well as the official credit union sponsor of the Detroit Lions. However, like many financial institutions, UMCU faced the challenge of standing out in a competitive market where similar banking products were widely available. Additionally, as a highly regulated institution, UMCU had been cautious about embracing emerging digital media opportunities. Recognizing the need to modernize their approach and better connect with consumers, UMCU partnered with (amp) to enhance their brand positioning and digital presence.

(amp) began by conducting in-depth research to define UMCU's brand identity, messaging, and competitive differentiators while also identifying key audience personas. Through stakeholder interviews and consumer surveys, the team uncovered UMCU's unique strengths—its strong sense of community, personalized customer service, and deep ties to Michigan athletics. To amplify these differentiators, (amp) executed a comprehensive digital strategy, including a website redesign, targeted media campaigns, and social media engagement. By leveraging insights from digital audits and audience research, the team developed customer journey maps and optimized messaging for each consumer segment, ensuring a more tailored and effective marketing approach.

The results spoke for themselves. (amp)'s social campaigns coincided with historic seasons for both the Detroit Lions and Michigan Wolverines, leading to record-breaking engagement across digital platforms. A Detroit Lions-focused campaign generated over 7.4K website clicks, while a Wolverines campaign saw a significant boost in social media followers and interactions. Beyond digital, (amp) played a hands-on role in driving real-world engagement through activations at major sporting events, including the Rose Bowl and the College Football Championship. On-site gamified lead generation strategies resulted in a 17% conversion rate, demonstrating the power of a cohesive, multi-channel approach. Through ongoing optimizations and strategic insights, (amp) helped UMCU not only enhance its digital presence but also establish itself as a trusted financial partner in the Michigan sports community.

CASE STUDY **UMCU**

SERVICES | Full-service Advertising

UMCU has tasked LEAP with solving several business problems including lead generation, product awareness, community relations, and experiential marketing. Currently, LEAP is focused on research, social media, content marketing, and business intelligence through advanced analytics.



+150%
Increase in engagement

+65%
Increase in CTR

+72,000
New unique, local users engaged

EXPERTS
G 00 f M e

10. Fueling Growth - A Data-Driven Marketing Strategy for True Food Kitchen

True Food Kitchen (TFK), a rapidly growing healthy eatery, had expanded to 43 locations and secured a \$100 million investment led by Centerbridge Partners. To demonstrate growth and deliver quick returns for investors, TFK needed a comprehensive marketing strategy that would drive in-store sales and boost online orders. Partnering with LEAP, TFK sought to enhance brand visibility while also ensuring a sustainable, long-term strategy for continued success.

Our team developed a dual-campaign approach to maximize impact. The Plus-Up Summer Campaign focused on key markets—Austin, TX, and West Los Angeles, CA—using a highly targeted media mix that included Google Ads, Meta, YouTube, iHeartRadio, and TikTok to drive foot traffic and online engagement. Simultaneously, the Always-On Nationwide Campaign maintained brand visibility across all other markets, leveraging search ads and video content to keep TFK top of mind. By continuously optimizing campaign performance and overcoming unforeseen challenges, including payment outages and Hurricane Hilary, we delivered a remarkable 3.67 Return on Advertising Spend (ROAS) in the first month, sustaining that momentum in the following months.

As the campaign evolved, we refined our strategy to maximize resource efficiency, shifting to a national audience focus in Q4. This data-driven pivot increased in-store visits by 255.8% and significantly improved online order conversions. By leveraging AI-driven ad units, localized targeting, and seasonally adjusted messaging, we ensured sustained growth and long-term success for TFK. Our strategic approach not only provided immediate investor returns but also positioned the brand for continued expansion in the competitive healthy dining market.

CASE STUDY

True Food Kitchen

SERVICES | Digital Strategy, Social Media, Google Ads, Video, Analytics, Optimization, Brand Engagement.

True Food Kitchen partnered with LEAP to drive immediate sales growth and long-term brand visibility following a \$100 million private-equity investment. Through a multi-channel media strategy and data-driven optimizations, we increased online orders, reversed a five-year performance decline, and boosted in-store visits by 255.8%.

1M
Users Reached

+255.8%
In-store visits

3.78
ROAS

EXPERTS



11. Standard Bariatrics - From Startup to \$300M Acquisition

Standard Bariatrics had a breakthrough device designed to bring consistency to sleeve gastrectomy procedures—one of the most performed bariatric surgeries in the U.S. But with limited brand recognition in a crowded medtech landscape, they needed more than just a compelling product—they needed to be seen, trusted, and adopted.

That's where (amp) came in.

As Standard Bariatrics' strategic media partner, (amp) developed a precision-targeted media plan to introduce the brand to accredited bariatric surgeons and hospital decision-makers. Our campaign spanned digital, print, and hyper-targeted LinkedIn geofencing to reach clinicians at key medical conferences and within priority health systems. Messaging focused on improved outcomes, surgical consistency, and innovation.

The impact was immediate: our campaign delivered over 1million impressions, drove surgeon engagement and credentialing sign-ups, and helped fuel the company's rapid growth—culminating in a \$300 million acquisition by Teleflex. From disruptive startup to industry standard, smart media made the difference.

CASE STUDY

Standard Bariatrics

SERVICES | Media Strategy, Digital Strategy,
Digital Advertising, Video, Analytics, Optimization,
Branding Initiative, Creative

Standard Bariatrics turned to (amp) to build awareness and drive adoption of its breakthrough bariatric surgery device. Through a targeted, multi-channel media strategy—including LinkedIn geofencing and conference-targeted digital ads—we reached surgeons at key touchpoints, fueling rapid growth and industry recognition that led to a \$300 million acquisition by Teleflex.

1M

Users Reached

15,000

Procedures performed
using Standard's technology

\$300M

Acquisition
by Teleflex

EXPERTS



4.3.1. Qualification and Experience Information

4.3.1.1. Detail Vendor Company Information

(amp) is a full-service media planning and buying agency specializing in omni-channel media strategies that drive measurable results. We bring together media expertise, creative strategy, and data-driven insights to maximize campaign impact. Headquartered in Louisville, Kentucky, with additional offices in Chicago, Cincinnati, and Indianapolis, (amp) has been delivering data-



driven media solutions for over 25 years. Leap Amp, LLC, doing business as (amp) operates as a Kentucky Limited Liability Company (KLC).

Formed in 1999, (amp) has grown into a national media powerhouse known for designing and executing dynamic, multi-channel campaigns that don't just meet KPIs—they redefine what's possible. With deep experience across travel, tourism, economic development, and lifestyle verticals, we are uniquely equipped to steward the vision and ambition of The State of West Virginia.

Over the past decade, we've partnered with public and private organizations to elevate destination brands and inspire new behaviors—whether that's increasing visitation, length of stay, or even permanent relocation. Our approach is rooted in strategy, powered by research, and scaled through innovation.

Legal Structure and Ownership

- Legal Entity: Leap Amp, LLC, doing business as (amp)
- Structure: Kentucky Limited Liability Company (KLC)
- Ownership: Privately held, independent

Number of Employees: 125+ full-time specialists

Core In-House Services:

- Media Strategy & Planning – Audience segmentation, omnichannel strategy, forecasting
- Media Buying & Optimization – Digital, search, social, OOH, TV, radio, and print
- Performance Analytics – Real-time insights, attribution modeling, reporting

The image shows a graphic for Leap Amp Media + Search Agency. It features a blue header with the (amp) logo and the text "Media + Search Agency". Below this is a dark blue section containing a list of services organized into two columns.

Media Strategy + Consulting	Paid Search
Media Planning + Buying	Paid Social
Programmatic	Paid Media for Recruiting
Social + Influencer	Consumer Insights
Community Media Management	Analytics + Reporting
Demand Generation	

Relevant Experience

Our experience spans diverse industries, with a particular focus on municipal media and placemaking initiatives. We have successfully collaborated with cities and public entities to highlight their unique characteristics while aligning with their strategic goals. Some of our notable projects include the follow current & past clients:

- **City of Fort Worth:** Recently awarded a partnership with the City of Fort Worth Environmental Services Department to deliver strategic, equity-focused marketing and outreach services that elevate community engagement across digital, print, and in-person channels to encourage recycling, prevent littering, and protect the environment . Through a task-order-based contract, we will develop and implemented creative campaigns, educational materials, and culturally inclusive content that supported the City's environmental initiatives and reinforced public awareness of key sustainability goals until 2029.
- **Town of Gilbert Office of Economic Development:** (amp) partnered with the Town of Gilbert Office of Economic Development to develop and execute a data-driven, multi-channel media strategy designed to elevate Gilbert as a premier destination for business, talent, and innovation. Our work included strategic media planning, precision audience targeting, and cross-platform media buying—combined with curated publisher partnerships that brought Gilbert's story to life across high-impact channels. The result was a highly efficient campaign that increased brand awareness, deepened engagement with key audiences, and supported the town's broader goals of economic growth and community development.
- **Georgia Southern University:** (amp) was selected as a trusted media partner to support Georgia Southern University's ongoing digital marketing initiatives across all campus locations. Our engagement involved executing performance-driven campaigns leveraging live email marketing with match-back display, streaming TV placements, SEM and retargeting, and online video advertising. We developed a flexible media plan tailored to the university's evolving enrollment and awareness goals—balancing high-impact streaming and display placements with cost-efficient SEM optimization. All campaign efforts were supported by a transparent, real-time reporting dashboard, ensuring full visibility and alignment with internal stakeholders throughout each initiative. This multi-channel approach drove increased inquiries, brand engagement, and market visibility for Georgia Southern's academic programs.
- **State of Kansas Department of Administration:** Partnered with the State of Kansas Corporation Commission to provide consumer and market research services, conducting surveys, focus groups, interviews, and in-depth qualitative and quantitative analysis. Our insights supported various state divisions by delivering data-driven strategies tailored to specific projects and audience needs across Kansas.
- **Hamilton County Public Health Department:** Played a key role in launching Michelle Obama's *Let's Move!* campaign in Cincinnati and Hamilton County, Ohio, promoting healthier foods in schools, community gardens, and safe parks. Through a multi-channel strategy—including TV, radio, digital, OOH, and interactive tools like GIS mapping and a dedicated website—the campaign successfully engaged the community and empowered families to embrace a healthier lifestyle.



In addition to our municipal and public sector work, (amp) has extensive experience partnering with commercial clients across various industries. Our ability to create compelling, market-driven brand strategies has helped businesses enhance their market presence, improve customer engagement, and drive long-term growth.

**Experience
you can trust.**

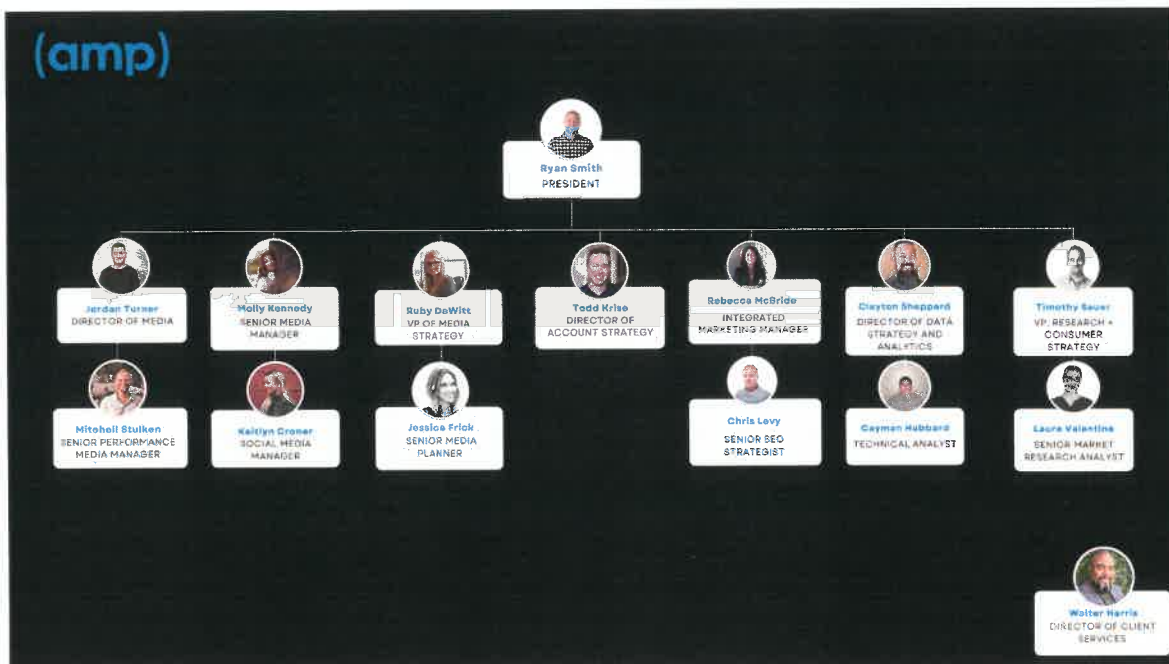
Because our focus is driven on human understanding, we have broad experience in multiple categories.

(amp) does not focus on one vertical. We apply our vast client experience across government, B2B and B2C to generate growth that makes brands matter more.

(amp)



Organizational Chart:



Agency Capacity and Resources

With a dedicated team of media strategists, buyers, and analysts who specialize in developing and executing comprehensive media campaigns. Our agency has the infrastructure, tools, and expertise to manage the full spectrum of media planning and buying, including digital, broadcast, out-of-home, and emerging media channels. With access to industry-leading platforms for audience insights, performance tracking, and real-time optimization, (amp) ensures that every campaign is data-driven and results-oriented. Our proven processes, strategic partnerships, and ability to scale campaigns efficiently allow us to deliver high-impact media solutions that align with client goals and exceed expectations.



(amp) confirms that there are no pending contracts to merge or sell any portion of the firm.

4.3.1.2. Scope and Length of Experience

For more than 25 years, (amp) has partnered with organizations whose missions depend on public trust and measurable outcomes. That is why our experience aligns so closely with the services requested in Section 4.2 of this RFP. The West Virginia State Treasurer's Office (STO) is not just a financial steward; it is a connector—helping residents recover more than \$40.6 million in unclaimed funds in FY2025, guiding families toward nationally ranked college savings plans like SMART529, and supporting individuals with disabilities through WVABLE. These

stories of impact demand communications that are clear, accessible, and motivating. Our work has prepared us to deliver exactly that.

a. Size and Types of Engagements

We have led campaigns that, like STO's, balance statewide scale with personal relevance:

- **Statewide public engagement:** In Hamilton County, we launched Michelle Obama's *Let's Move!* campaign, a \$2M multi-channel initiative encouraging healthier lifestyles. Families saw their own children in our TV and digital spots—an approach we would adapt for STO programs like *SMART529* or the *Hope Scholarship Program*, where parents must see their family's future in the story being told.
- **Multi-year, multi-program contracts:** Our task-order contract with the **City of Fort Worth Environmental Services** mirrors the STO's portfolio structure. Each campaign—from recycling to litter prevention—follows a process of research, implementation, mid-course assessment, and post-campaign reporting. This mirrors the STO's requirement for **weekly updates, approval cycles, and 45-day post-campaign reports**.
- **Economic development & financial services:** For the **Town of Gilbert** we created campaigns to attract business and talent. For **Republic Bank**, we grew new customer accounts across five states with a 227% increase in conversions. These experiences align with STO programs like *WV457 Retirement Plus* and *Jumpstart Savings*, which target very specific segments (public employees, skilled trades, entrepreneurs) with calls to action that directly affect financial behavior.

b. In-House Capabilities

(amp) employs **125+ full-time specialists** across account management, research, creative development, media strategy, buying, and analytics. This scale allows us to deliver the complete scope of services outlined in **Section 4.2 of the RFP** entirely in-house, without reliance on subcontractors. For a state contract, this distinction is critical: it keeps costs transparent, ensures that no third-party markups are added to campaign budgets, and allows for direct accountability on performance. More importantly, it means the same team that develops the strategy is also executing, optimizing, and reporting on results—creating a seamless line of responsibility from concept to outcome. Our in-house structure also allows us to move quickly. For example, when the **American Kennel Club (AKC)** launched its national awareness campaign *Everything We Do, We Do for Dogs*, our integrated team produced and deployed creative across broadcast, digital, and event channels in a matter of days—delivering a :60 national broadcast spot, multiple digital cutdowns, and companion assets that reached millions nationwide. That same agility will be brought to STO campaigns, whether it's an urgent push around Hope Scholarship enrollment deadlines, a targeted Unclaimed Property initiative, or sustained education for SMART529 and WVABLE accounts.

- **Research and Strategy:** Our PhD-led insights team conducts surveys, focus groups, and message testing. In Kansas, we used statewide research to identify communication barriers across divisions. For STO, this could mean understanding why some families hesitate to open a 529 account, or what prevents eligible employees from enrolling in *Retirement Plus*.

- **Creative Services:** We turn insights into stories. For Louisville Water, we produced videos on lead-free drinking water—translating a technical issue into a clear, human narrative. For STO, we can apply the same clarity to explain *WVABLE* accounts or the *Hope Scholarship*'s funding rules in ways that feel both trustworthy and empowering.
- **Media Buying & Placement:** Certified buyers execute across broadcast, digital, social, CTV, OOH, and print. For **Republic Bank**, our integrated media campaign drove a **231% increase in impressions** and a **227% increase in conversions**, proving our ability to manage high-stakes, regulated messaging at scale with measurable outcomes.
- **Analytics & Reporting:** Real-time dashboards and post-campaign reports are standard. This ensures STO's stakeholders see results not in abstract metrics but in **claims processed, accounts opened, and families reached**.

c. Locations from Which Services Will Be Provided

Work will be managed from our **Louisville headquarters**, supported by offices in **Chicago, Cincinnati, and Indianapolis**. This structure ensures both scale and proximity—ideal for managing task orders, producing content, and reporting across multiple STO programs simultaneously.

d. Distinguishing Characteristics

What sets (amp) apart is not only our capabilities but how they align with the STO's unique mission:

Program Parallels:

- *Unclaimed Property* → Our Let's Move! campaign shows we know how to motivate statewide participation.
- *SMART529* → Our higher education campaigns demonstrate how to speak to parents and students about future planning.
- *WVABLE* → Our equity-focused work in Fort Worth proves we can deliver accessible, inclusive messaging to underserved audiences.
- *WV457 Retirement Plus* → Our work for Republic Bank shows how to move financial customers from awareness to enrollment.
- *Hope Scholarship* → Our enrollment marketing for Georgia Southern University shows how to reach families in defined windows with urgency.

Storytelling Grounded in Research: Every program begins with Discovery and Research. In Kansas, we learned how rural audiences consumed information differently than urban ones; in Fort Worth, we're in the process of designing multilingual assets to reach immigrant populations. For West Virginia, research will tell us how to engage families in Logan County versus Morgantown, or how to communicate *Jumpstart Savings* to young tradespeople just entering the workforce.

- **Public-Sector Accountability:** Weekly progress updates, compliance with approval processes, and 45-day reporting windows are already built into our workflows.



- **Results That Translate:** From **+37% membership growth for Bluegrass REALTORS®** to **\$300M in medtech acquisition value for Standard Bariatrics**, our campaigns prove that strategy plus storytelling drives measurable impact.

For STO, that means dollars returned, accounts opened, and futures secured.

At its core, the Treasurer's Office tells stories of possibility: a forgotten paycheck returned, a college fund started, a worker saving for retirement, a student given new options through a scholarship. (amp) tells those same kinds of stories for clients every day, grounded in research, delivered with clarity, and measured by real-world impact. With our team, STO will have a partner that doesn't just meet the scope of work in this RFP, but one that helps West Virginians see themselves in the programs designed for their success.

4.3.1.3. Account Executive

Ruby DeWitt, Vice President, Media Strategy

Primary work location: Louisville, Kentucky

Qualifications & Education

- **B.A., Journalism — Indiana University, Bloomington.**
- 14+ years in digital/media leadership spanning strategy, paid media, and content distribution; 10+ years at the management level. (Agency roles include Director, Media & Advertising, followed by current VP, Media Strategy.)

Years with (amp)

- **2017–2023:** Director, Media & Advertising
- **2023–present:** Vice President, Media Strategy (8+ years total tenure at (amp)).

Expertise with Similar Projects (Representative Work)

- **American Kennel Club & True Food Kitchen:** Develops research-driven media strategies integrating qualitative and quantitative insights.
- **Heaven Hill Brands (multi-brand portfolio including Lunazul, Deep Eddy, Admiral Nelson's):** Scaled paid social and digital, expanding portfolio from 2 to 6 brands through performance and strategy.

Prior leadership directing multi-client content distribution and paid media teams for national brands and nonprofits (e.g., Cummins, Walton Family Foundation, Methodist Health Foundation).

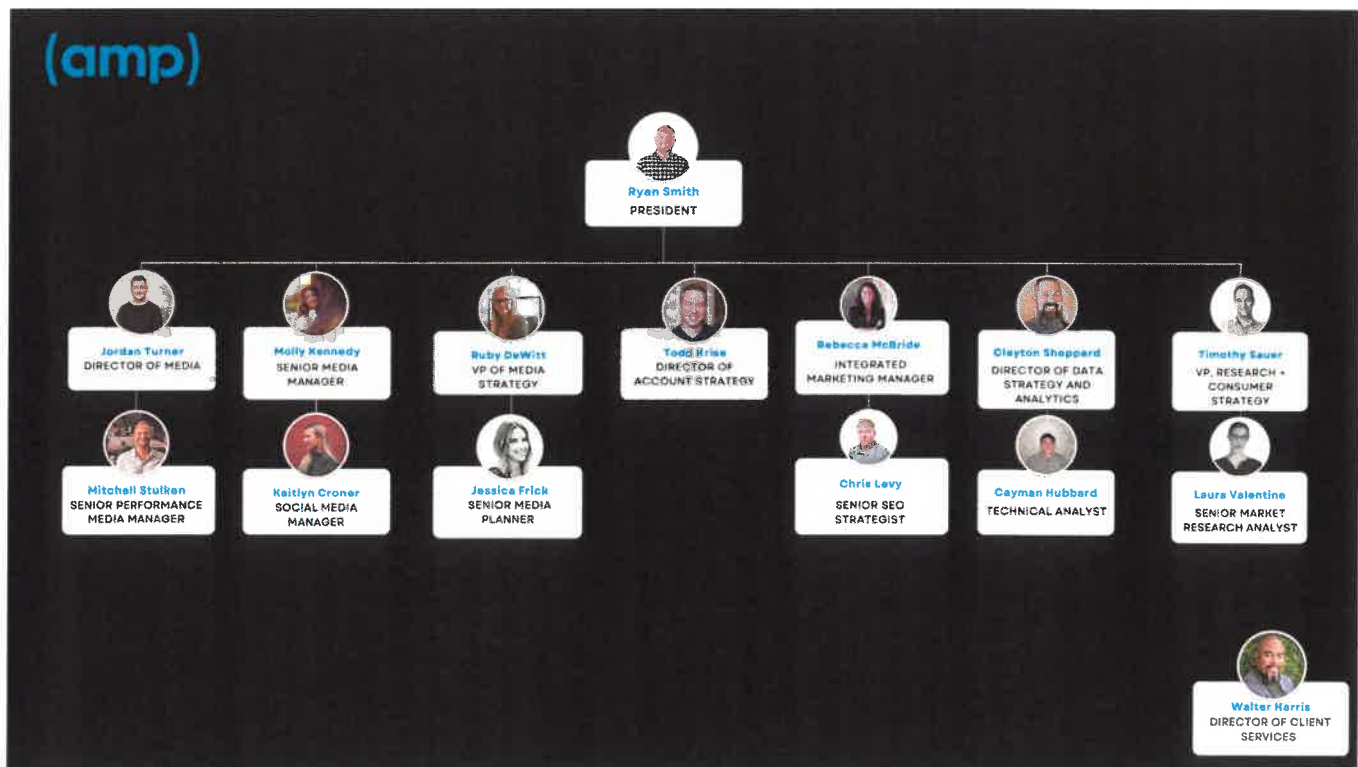
Role on the STO Account

- Overall, hands-on account management lead and day-to-day point of contact responsible for strategy integration, weekly progress reviews, and cross-program coordination (Unclaimed Property, SMART529, WVABLE, WV457, Hope Scholarship, Financial Education).
- Directs (amp)'s in-house teams across media, creative, research, and analytics to align deliverables to RFP requirements (planning, creative development, placement, tracking, mid-campaign assessments, and post-campaign reporting).
- Oversees performance management and reporting cadence to ensure measurable, outcome-based KPIs are met and communicated clearly to STO stakeholders.

Contact: Available upon request; see proposal cover page for firm contacts.

4.3.1.4. Account Team

Organizational Chart:



Name	Title	Role in Project	Qualifications & Experience
Ryan Smith	President	Provides strategic leadership and vision for the agency, driving overall growth and ensuring the agency's approach aligns with client goals.	25+ years in marketing and agency leadership
Ruby DeWitt	VP of Media Strategy	Leads the development of comprehensive media strategies, optimizing campaign performance through data-driven insights and market analysis.	15+ years in media planning
Jordan Turner	Director of Media	Oversees the planning and buying of media across digital, traditional, and emerging platforms. Specializes in integrated omni-channel plans.	12+ years in media management
Todd Krise	Director of Account Strategy	Manages client relationships and ensures seamless execution of campaigns. Focuses on aligning internal teams with client objectives.	12+ years in account strategy
Molly Kennedy	Senior Media Manager	Leads execution of media plans across digital and traditional platforms. Ensures optimal ad placement, budget allocation, and tracking.	8+ years in media planning

Mitchell Stulken	Senior Performance Media Manager	Specializes in performance analytics, attribution modeling, and ROI measurement. Optimizes strategies to drive conversions and efficiency.	7+ years in digital media
Kaitlyn Croner	Social Media Manager	Develops and executes paid social campaigns including content, targeting, and analysis across Facebook, Instagram, LinkedIn, and TikTok.	8 years managing social platforms
Cayman Hubbard	Technical Analyst	Provides technical and analytical support for digital tools, platforms, and integrations. Assists in data management and reporting.	3–5 years in martech and analytics
Timothy Sauer	Vice President of Research & Consumer Strategy	Oversees all consumer research and insights initiatives. Leads qualitative and quantitative research efforts to shape strategy and drive client decision-making. Translates data into actionable marketing and brand recommendations.	25+ years in consumer research and strategy
Laura Valentine	Senior Market Research Analyst	Designs and conducts research projects, turning consumer and market data into actionable insights for strategic planning.	5–7 years in consumer research

Walter Harris	Director of Client Services	Oversees client satisfaction and delivery excellence. Ensures that internal teams meet or exceed client expectations through collaboration.	15+ years in client management
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Attached (following the RFP Form at the end of this proposal) are the team's resumes.

4.3.1.3. Identify the person who will have overall, hands-on account management responsibilities for the services, who will be known as the account executive. Provide a resume for this individual, including his or her qualifications, experience, expertise with similar projects, number of years with your firm and primary work location.

Repeat question

4.3.1.4. Identify the person(s) in your firm, other than the account executive, who will generally be assigned to provide the services. Describe the role of each person listed and provide a brief resume of each person listed which includes his or her qualifications, experience, expertise with similar projects, and number of years with your firm.

Repeat question

4.3.1.5. Describe your company's approach when there is turnover on a project team, including your ability to continue client services at the established level of quality without interruption.

Continuity of Service During Staff Turnover

At (amp), we understand that staffing transitions may occur over the course of a long-term contract. What matters is ensuring that these changes never compromise the quality, timeliness, or accountability of services provided to the West Virginia State Treasurer's Office. Our approach is designed to maintain continuity at every stage of a project, so campaigns move forward without interruption.

Our Continuity Process

Cross-Trained Teams

Each STO engagement is supported by more than one staff member in all key functions—media



strategy, creative development, analytics, and account management. This ensures that responsibilities are always shared and another qualified team member can step in without delay.

Centralized Documentation

All project information—creative briefs, media schedules, budgets, and reporting—lives in shared systems accessible to the full project team. This prevents knowledge gaps and allows new or backup staff to pick up work immediately.

Structured Transition Protocols

In the event of turnover, we conduct a formal handoff process that includes:

- A written summary of all active work and deliverables.
- A live walkthrough between outgoing and incoming staff.
- Leadership oversight during the transition period to guarantee consistency.

Leadership Stability

Senior leadership remains engaged for the full life of the contract. Their presence provides continuity of decision-making, ensures smooth transitions, and maintains accountability to STO's standards.

Why This Matters for STO

Programs like SMART529, Unclaimed Property, WVABLE, and WV457 are directly tied to the financial well-being of West Virginians. Any delay or inconsistency in messaging could create confusion or reduce participation. Our systems are designed to prevent that. With built-in redundancy, transparent documentation, and leadership oversight, (amp) ensures campaigns will continue seamlessly, even if staff changes occur.

From STO's perspective, success means never experiencing disruption due to staffing transitions. Campaigns remain on schedule, reporting continues as planned, and deliverables meet the same standards of quality and consistency. In short: our process, not any single individual, carries projects forward.

4.3.2. Mandatory Experience Requirements

(amp) meets, and in several areas exceeds, the mandatory qualifications outlined in Section 4.3.2.1-4.3.2.3. Below, we identify the designated leader for this engagement, document qualifying engagements (with annual billings >\$200,000 within the past three years), and confirm the supervising staff member's credentials.

4.3.2.1 Managing member/director with 5+ years of management-level experience

- **Designated Managing Director for this contract: Ruby DeWitt**, Vice President, Media Strategy (LEAP Amp).

- **Management tenure:** 10+ years in management-level media leadership roles (Director, Media & Advertising 2017–2023; Vice President, Media Strategy 2023–present).
- **Scope of management:** Leads multi-disciplinary teams across strategy, planning, buying, and optimization for national brands and complex public-interest campaigns; oversees partner ecosystems (publishers, networks, ad-tech) and cross-channel performance.
- **Meets/Exceeds:** Exceeds the 5-year minimum with a decade of management-level responsibility guiding engagements of national scale and public significance.

4.3.2.2 At least two engagements (last 3 years) with annual billings > \$200,000, managed or directed by the managing member/director

Engagement A — Lunazul Tequila, Heaven Hill Brands

- **Managing Director:** Ruby DeWitt, Vice President of Media
- **Relationship Length:** 2021–2022 (brand refresh and national campaign)
- **Annual Billings:** \$3,883,800
- **Services Provided:** National omni-channel media planning and buying, creative direction, campaign strategy, social media amplification, influencer management, and performance optimization.
- **Results:** The “Feed the Wolf” campaign transformed Lunazul from a bottom-shelf afterthought to a premium brand. Results included a **140% increase in in-store sales**, a **400% increase in share of voice**, and a **57.9% increase in brand lift**. The companion influencer and content series, “A Toast to Tradition,” generated **366M+ impressions** and significantly boosted brand awareness and consideration.
- **Relevance to STO:** This campaign shows Ruby’s ability to lead high-stakes, multi-million-dollar media efforts that combine storytelling, research, and rapid execution—skills directly applicable to STO’s multi-program portfolio.

Engagement B — American Kennel Club (AKC) National Brand Campaign

- **Managing Director:** Ruby DeWitt
- **Relationship Length:** 2023–Present (ongoing)
- **Annual Billings:** Exceeds \$200,000
- **Services Provided:** National broadcast/digital media strategy and buys; sequencing across :60/:30/:15/:06 video; creator/social amplification; flighting around tent-pole events; measurement framework and post-buy analysis.
- **Notes:** Broadcast-quality deliverables paired with multi-platform media; rigorous QA, trafficking, and attribution.
- **Meets/Exceeds:** Meets the requirement and demonstrates breadth (healthcare/public-interest and national nonprofit), complexity (broadcast + digital at scale), and recent-period performance (within the past three years).

4.3.2.3 – Supervising Staff Member Qualifications

Supervising Staff Member Assigned:

Jordan Turner, Senior Director of Performance Media

Education:

- Master of Business Administration (MBA), Lindenwood University – 2012
- Bachelor of Science in Finance, Murray State University – 2009

Related Experience:

Jordan Turner brings over 15 years of experience in paid media strategy, planning, and execution across diverse sectors, including biotech, banking, manufacturing, travel, and government-related campaigns

He has managed large-scale teams and budgets at the management level for more than a decade, with specific expertise in:

- Search, social, OTT/CTV, streaming audio, and out-of-home media.
- Leading cross-functional teams to deliver integrated campaigns for mid-cap and large-cap accounts.
- Overhauling and modernizing media operations, including AI-driven optimizations, attribution modeling, and revenue growth strategies.
- Successfully running multi-million-dollar campaigns with measurable outcomes for both private and public sector clients.

As Senior Director of Performance Media at (amp), Jordan manages all paid media teams and reports directly to executive leadership. His leadership ensures campaigns are not only technically sound but strategically aligned with client goals, supported by his background in both finance and marketing.

Team Continuity & Substitution Standard:

(amp) provides all services fully in-house, strategy, research, creative, production, media, and analytics. In the unlikely event that a substitution is required, any replacement staff member will meet or exceed the same qualification thresholds outlined in Section 4.3.2.3 (bachelor's degree in advertising/communications/marketing/finance or 5+ years directly related experience). The Agency will be notified in advance, and approval will be sought before any substitution is finalized.

Meets/Exceeds:

Jordan Turner exceeds the minimum qualification threshold, holding both an MBA and over 15 years of professional experience, including 10+ years in management-level media leadership. His expertise and leadership ensure the Treasurer's Office receives uninterrupted, high-quality service, supported by the depth of (amp)'s 125+ in-house specialists.



Designated Contact Form

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) John Rivers III
(Address) 2500 Technology Drive, Louisville, KY 40299
(Phone Number) / (Fax Number) 502-974-2287 502-212-1391
(email address) jriders@leapgroupnetwork.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 with any State agency that may require registration.

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.

LEAPamp LLC dba (amp)

(Company)

(Signature of Authorized Representative)

John Rivers III

(Printed Name and Title of Authorized Representative) (Date)

502-974-2287 502-212-1391

(Phone Number) (Fax Number)

jriders@leapgroupnetwork.com

(Email Address)



RFP Form

REQUEST FOR PROPOSAL
West Virginia State Treasurer's Office
Professional Advertising, Marketing and Promotional Services

- 6.8. Availability of Information:** Proposal submissions become public and are available for review immediately after opening pursuant to West Virginia Code §5A-3-11(h). All other information associated with the RFP, including but not limited to, technical scores and reasons for disqualification, will not be available until after the contract has been awarded pursuant to West Virginia Code of State Rules §148-1-6.3.d.

By signing below, I certify that I have reviewed this Request for Proposal in its entirety; understand the requirements, terms and conditions, and other information contained herein; that I am submitting this proposal for review and consideration; that I am authorized by the bidder to execute this bid or any documents related thereto on bidder's behalf; that I am authorized to bind the bidder in a contractual relationship; and that, to the best of my knowledge, the bidder has properly registered with any State agency that may require registration.

LEAPamp LLC dba (amp)

(Company)

John Rivers III, Agency Fit Consultant
(Representative Name, Title)

502-974-2287 jriverson@leapgroupnetwork.com

(Contact Phone/Email)

9/8/2025

(Date)



15+ years of experience
leading strategy,
operations, and growth
across marketing, media,
and content businesses

Co-founded and scaled
(amp) into a performance-
driven agency within Leap
Group's network

Led agency operations and
client performance for
Raidious across multiple
leadership roles

Oversaw 15+ person
production team and built
service lines from the
ground up

Proven track record of
aligning shareholder,
board, and client goals
within fast-paced agency
environments

RYAN SMITH

President

LinkedIn: <https://www.linkedin.com/in/ryansmithpr/>

Ryan Smith brings over **15 years** of experience in marketing leadership, business operations, and strategic growth across media, content, and transportation sectors.

Current Role

Leap Group / (amp) – Indianapolis, IN

President & Co-Founder 2017–Present

- Co-founded and co-leads (amp), Leap Group's media and amplification agency, overseeing daily business operations and long-term vision
- Serves as lead strategist across all major accounts, aligning paid media, content amplification, and audience engagement strategy
- Manages agency operations including financial planning, staffing, and shareholder communications
- Oversees execution and strategic direction for cross-functional teams serving national healthcare, public sector, and consumer brands

Experience Prior to (amp)

Raidious – Indianapolis, IN

President & Chief Operations Officer 2013–2017

- Directed agency-wide operations and strategic growth for a digital content amplification firm
- Led long- and short-term business planning, revenue strategy, and performance measurement
- Reported directly to the board of directors, delivering regular KPI and financial performance updates
- Scaled operations and implemented organizational processes that supported team growth and service expansion

Raidious – Indianapolis, IN

Vice President of Production 2011–2013

- Managed a 15+ person production team responsible for content execution across multiple platforms
- Maintained service line profitability while improving internal workflows and creative quality control
- Mentored staff, evaluated individual performance, and aligned team output with client expectations
- Oversaw content development for enterprise clients during early-stage social media adoption



RYAN SMITH

President

Raidious – Indianapolis, IN

Director of Social Media 2009–2011

- Established and launched the agency's first social media service line
- Acted as account lead across early social media clients, delivering campaign strategy and content oversight
- Introduced best practices for monitoring, engagement, and content planning

EXPERTISE: Business operations, digital media strategy, agency leadership, paid media and amplification, cross-functional team management, strategic planning, client relationship leadership, content marketing, and startup growth.

EDUCATION: Bachelor of Arts in Journalism – Public Relations, Indiana University – Indianapolis

15+ years of experience
leading strategy,
operations, and growth
across marketing, media,
and content businesses

Co-founded and scaled
(amp) into a performance-
driven agency within Leap
Group's network

Led agency operations and
client performance for
Raidious across multiple
leadership roles

Oversaw 15+ person
production team and built
service lines from the
ground up

Proven track record of
aligning shareholder,
board, and client goals
within fast-paced agency
environments

RUBY DEWITT

812-340-0135 | rdewitt@leapamp.com | Indianapolis, IN

EXPERIENCE:

LEAP Amp, Indianapolis, Ind.

Vice President, Media Strategy

2023-Present

Leverages qualitative and quantitative research to develop cutting-edge marketing strategies for clients, such as Eli Lilly & Company, True Food Kitchen, and the American Kennel Club.

- Maintains relationships with network, publisher, influencer, and ad tech partners. Keeps abreast of the always-changing digital landscape and partners' evolving capabilities to determine value within clients' strategies and plans.
- Responsible for retaining and growing current business. Provides subject matter expertise in media strategy and planning, as well as oversees execution of media buys, for Lilly's Corporate Affairs and Medical Affairs teams. The ongoing success of both programs has resulted in year-over-year growth for three consecutive years.

Director, Media and Advertising

2017-2023

Responsible for the development and execution of media strategies for clients, such as P.F. Chang's, Heaven Hill Brands, and Progress Software.

- Led team of social media managers and media buyers that manage more than 15 clients' digital advertising efforts.
- Responsible for retaining and growing current business. Developed the organic and paid social media strategies for Hpnotiq and Cold Spell Whiskey. The success from both programs resulted in growing the agency's Heaven Hill Brands portfolio to six brands, including Admiral Nelson's Rum, Blackheart Rum, Burnett's Vodka, Deep Eddy Vodka, and Lunazul Tequila.

Raidious, Indianapolis, Ind. (Now MKR Agency)

300 North Meridian Street, Suite 1750 | 317.955.9414

Director of Social Media and Content Distribution

2014-2017

Responsible for the coordination and execution of organic and paid content distribution services. Effectively collaborates with other service line directors and senior strategists to develop comprehensive owned media strategies for clients, such as Cummins, Mint, Mercer, Walton Family Foundation, and Methodist Health Foundation.

- Lead team of four community and media managers that manage more than 20 clients' social media channels and digital advertising efforts.
- Created Raidious' fastest growing service line after identifying an opportunity for the agency to expand its organic social media offering to paid media and influencer marketing.
- Retained a long-term relationship with the world's largest children's museum, The Children's Museum of Indianapolis, by successfully managing, creating, and measuring blog and social media content.
- Developed the organic and paid social media strategy for Lids Sports Group. After implementation, the hat retailer's Facebook audience grew by 58 percent in four months while maintaining steady month-over-month engagement.
- Crafted and implemented a video distribution strategy for Ernest Packaging Solutions in partnership with Fender, earned 2.2 million views in one month, a 435 percent increase in views from the company's second most popular YouTube video.

Social Media Manager

2011-2014

Managed the creative content and audience engagement for brands on their social media channels.

- Managed and measured the social media channels for Walmart Corporate Affairs, increasing overall engagement and total audience by 10,000 followers.
- Executed a monitoring strategy for Indiana University Health that expedited social response time from more than 48 hours to less than 24 hours, decreased negative sentiment by 10 percent and enabled the healthcare system to measure conversation before, during and after PR-related incidents.
- Implemented content and 24/7 on-channel monitoring strategies for Finish Line, which increased the sports retailer's direct Facebook audience from 100,000 to 1.5 million fans in 10 months. By establishing direct correlations from social engagement to intent to purchase, increased online sales by 60.1 percent.

- Coordinated with Super Bowl XLVI committee members and trained student interns to help implement the first-ever Super Bowl Social Media Command Center. The real-time monitoring and response to online conversations surrounding the week's events was so successful that the New Orleans' Super Bowl committee met with the Raidious team to implement a similar strategy for Super Bowl XLVII.

EDUCATION:

Indiana University, Bloomington, IN, **Bachelor of Arts in journalism** 2011

JORDAN WESLEY TURNER, MBA.

Phone: 317.499.1529 | Email: jturner@leapamp.com | Indianapolis, IN

SUMMARY

- Jordan is a mastered Internet Marketing Consultant with over 15 years of paid media experience spanning multiple media disciplines. He has spent nearly 2 years with LEAP and following over 5 years as a freelance media consultant and has a passion for solving multiple projects at once within fast-paced agency environments. His experience spans numerous verticals including bio tech, agriculture, manufacturing, banking, restaurants, travel, and affiliate marketing.

EDUCATION

Lindenwood University

Master of Business Administration

7/2012

Murray State University

Bachelor of Science, Finance

5/2009

TECHNICAL SKILLS

Digital Marketing - SEM/PPC Management, Ad Ops, Keyword Research, Attribution, Reporting.

Applications - MS Excel, Salesforce, Adobe Premiere Pro, WordPress, WooCommerce, Shopify.

Analytics - Google Analytics, AdWords, Marin, SEM Rush, SpyFu, Google Ads, Datorama.

EXPERIENCE

LEAP (amp) - Indianapolis, IN

310 N Alabama St. #350, Indianapolis, IN 46204 | POC: 513.733.0290 - Ryan Smith

Senior Director - Performance Media

3/2023 - Present

- Managed all paid media teams including search, social, OTT, CTV, streaming/podcast radio, and OHH.
- Reported directly to the executive teams regarding paid media performance and planning.
- Collaborated with cross-functional teammates to further client initiatives and media innovations.
- Achieved record growth and retention in part of our recognition as an Inc. 5000 fastest growing company.

Director - Paid Search

1/2022 - 2/2023

- Managed international, remote, and office hybrid team and media for mid and large cap accounts.
- Developed and implemented media strategy and initiatives in preparation for 2022 Google Ads updates.
- Overhauled paid search team operations, implementing generative AI, overhauling SOPs, and growing revenue.

BoomAgain.com - Boulder, CO

Digital Operations/Demand Generation

6/2020 - 12/2021

- Developed and managed paid media including Google Ads, Bing, Facebook, native and affiliate.
- Achieved over \$650K in game sales (single product) during the first 6 months post-launch.

Stevegoods.com - Longmont, CO

Chief Operating/Marketing Officer

9/2019 - 3/2021

- Managed two ecommerce brands simultaneously and solo throughout 2020 office closure.
- Planned and implemented all digital media and demand strategy from March 2020 - March 2021.

Emergent Digital - San Diego, CA

Director of Paid Media

9/2016 - 3/2018

- Managed Paid Media team via channels including AdWords, Bing, Facebook, LinkedIn, and native.
- Templated a conversion-focused approach to B2C AdWords and Facebook media buys.

IIM Digital - Denver, CO

Founder/Consultant

10/2013 - 2/2018

- Managed large-budget national PPC campaigns (Google, Bing, Facebook, LinkedIn).
- Templated a conversion-focused approach to B2C AdWords and Facebook media buys.

TODD KRISE

PH: 502-741-7850 Email: tkrise@leapamp.com Louisville, KY

SUMMARY:

As strategy lead for the Midwest's best media amplification agency, it's my job to promote creative assets that have a positive, valuable impact.

WORK EXPERIENCE:

LEAP Group - Louisville, KY (09/2021-present)
2500 Technology Dr., Louisville, KY 40299

Director, Account Strategy. 2023-present

Drives omnichannel strategy and planning for digital marketing solutions that support the marketing vision, strategy and messaging campaigns to advance the outreach and transactional needs of all Leap Group media clients.

- Serves as a key facilitator and leads the activities of the Media Operations team to inspire and deliver on long-term strategic goals and immediate business objectives
- Responsible for leading the execution of campaign strategies and other marketing project objectives to reach desired results

Senior Account Manager. 2021-22

Manage senior strategists on day-to-day client strategy needs on a group of accounts – guiding insight generation, creative briefs, selling narratives, strategic POVs and go-to market plans

- Certifies the on-time and on-budget completion of a wide range of strategic marketing projects with constantly shifting priorities; supports project planning and execution

Spalding University - Louisville, KY (2014-2021)
901 S 4th St, Louisville, KY 40203

Adjunct Professor. 2014-2021

Part-time instructor of two digital marketing courses

- Students examine advanced digital marketing topics, including: email marketing, display advertising, mobile marketing and search engine optimization, social media marketing, pay-per-click, and analytics

Vimarc - Louisville, KY (2014-2021)
1205 E Washington St # 120, Louisville, KY 40206

Director, Integrated Communications. 2014-2021

Evaluate agency and client interactive services; recommend areas where improvement is needed; and develop plans for achieving that improvement

- Strategize with clients, account service, creative service and media buying teams on incorporating relevant interactive communication techniques into products and services
- Supervise content development for clients and the agency, and distribute that content through all pertinent channels

EDUCATION:

Spalding University, Louisville, KY, **Master of Science (Business Communication) - 2015**

West Virginia University, Morgantown, WV, **Bachelor of Science (Journalism) - 2008**

Molly Kennedy

3172923346

[k mkennedy@leapamp.com](mailto:mkennedy@leapamp.com)

Professional Summary

Results-driven Media Manager with over eight years of experience in social media strategy, content creation, and digital marketing. Skilled in developing and implementing innovative strategies to build brand presence, engage audiences, and drive growth. Proficient in graphic design, photography, videography, SEO, and cross-platform content management. Adept at leveraging data analytics to optimize campaigns and enhance user experience.

Professional Experience

LEAP Amp | Indianapolis, IN

Senior Media Manager

(2019 - Present)

Clients: Eli Lilly, American Kennel Club, True Food Kitchen, Summit Brands

- Developed and executed media strategies by utilizing detailed targeting tactics to maximize audience reach, engagement, and conversion rates across multiple social platforms. These strategies incorporated audience insights, behavioral data, and A/B testing to ensure optimal performance.
- Created and collaborated with cross-functional teams to develop compelling ad content tailored to diverse audience segments on platforms such as Meta, LinkedIn, and TikTok. Leveraged platform-specific trends, formats, and creative best practices to enhance campaign effectiveness and engagement. This includes both shooting and creating the content and also working with creative teams to guide their executions as well.
- Developed and executed influencer marketing strategies, partnering with influencers across various verticals to build brand trust, authenticity, and awareness. Conducted research to identify suitable influencers, managed outreach and contracts, and ensured alignment with client goals and brand messaging.

Kentucky Derby | Louisville, KY

Content Manager (Freelance)

May 2020 - Present

- Collaborate with stakeholders to maintain and grow digital presence for the iconic event.
- Deliver engaging multimedia content to enhance audience experience.

Social Media Manager (Freelance)

June 2016 - Present | Indianapolis, IN

- Partner with business owners to establish and expand their online presence.

- Create tailored strategies for diverse clients across platforms like Instagram, Facebook, and Twitter.
- Analyze campaign success metrics to refine future strategies.

Freelance Photographer/Videographer

January 2016 - Present

- Deliver high-quality visual content to support clients' branding and storytelling needs.

MainGate Inc. | Indianapolis, IN

Digital Content and Social Media Assistant

August 2017 - August 2018

- Designed and executed social media campaigns to support merchandise and event promotions.
- Humane Society of Indianapolis | Indianapolis, IN

Education

Indiana University

Bachelor of Arts in Psychology

Achievements

1. Successfully raised \$100,000+ for Eiteljorg Museum event fundraising.
2. Achieved notable growth in audience engagement and brand visibility for freelance clients.
3. Reduced customer service issues through user-friendly web and social media optimizations.

MITCHELL STULKEN

Sr. Paid Search Specialist

ABOUT

Paid media professional with 8+ years of Google Ads, Bing, and Amazon Ads experience in Retail, Education, FinTech, & Professional verticals. Proven track record of growing revenue, account growth, and client relationship management.

PROFESSIONAL EXPERIENCE

Sr. Manager, Performance Media Leap Group (2024-present)

Clients: American Kennel Club, Confluent Health, Republic Bank

- Able to scale AKC registration spend while hitting KPI's
- Developed strategies and implemented campaigns for all clients
- Executed YouTube tests for Confluent Health

Sr. Paid Search Specialist Empower (2023-2024)

Clients: Leap Frog, Vtech, Sprouts, Jack Links, Rust-Oleum

- Developed strategies and implemented campaigns that increased Leap Frog and Vtech from 9x to 12x ROAS
- Launched new campaigns to promote openings of Sprouts Grocery store locations. Driving a 2x increase of store visits when implemented
- Directed YouTube for Jack Links and increased market share by 8%
- Plan and execute a/b tests in Amazon and Google for Leap Frog and Vtech
- Create and present reports showing clients performance results and strategies for the future

Sr. Paid Search Specialist SCS (2021-2023)

Clients: Vans, Aarons, GroundTruth, AMES, Rent-a-Wheel, Pfister

- 3x AMES ad spend while simultaneously maintaining an efficient return on ad spend (ROAS) within 3 months
- Spearheaded a strategy that led to a 16% increase in leads for Rent-a-Wheel within a span of just 2 months
- Achieved a 54% reduction in cost per acquisition (CPA) for Pfister within a period of just 3 months
- Successfully managed an annual portfolio valued at \$18M+, consistently achieving positive return on investment (ROI) that surpassed established goals.
- Plan and execute media campaigns and a/b testing across several platforms – Google Ads, Bing Ads, Meta, & Amazon
- Deliver comprehensive campaign performance analysis, strategic

✉ stulkenmitchell@gmail.com

☎ (605) 530-2448

📍 606 N Jackson Ave Pierre, SD, 57501

EDUCATION

DAKOTA STATE UNIVERSITY
Madison, SD

Computer Security E-Commerce
(May 2006)

ADDITIONAL SKILLS

Google Analytics

Google Tag Manager

SEM Rush

Excel

Shopify

Amazon

Meta

LICENSES AND CERTIFICATIONS

Google Ads Certified

Google Ads Video Certification

Google Ads Shopping Certification

Google Ads Search Certification

Google Ads Display Certification

Google Ads Fundamentals

insights, and actionable recommendations to drive optimization and growth for both internal teams and clients.

- Demonstrated ability to identify areas for performance improvements and optimizations through comprehensive audits, resulting in significant performance enhancements

Chief Operating Officer

Ignite Your Brand (Jan 2017 – 2021)

Clients: QuickBooks, Method Men, Philo, Mrs. Meyers, Visa RealSteel

- 10x RealSteel ad spend within span of 3 months, resulting in consistently positive returns on investment (ROI)
- Conducted a comprehensive audit of the Mrs. Meyers account, leading to a 44% decrease in cost per acquisition (CPA) within a timeframe of just 2 months
- Conducted in-depth analysis of campaigns, translating data into actionable recommendations to drive strategic goals and achieve positive return on advertising spend (ROAS)
- Set up and managed Google Analytics & Google Tag Manager for seamless data collection and analysis

Contact

kmcroner@gmail.com

www.linkedin.com/in/kaitlyn-croner

(LinkedIn)

kmcroner.wixsite.com/kaitlyncroner

(Portfolio)

Top Skills

Public Relations

Advertising

Marketing

Certifications

Sprout Social Agency Certification

Kaitlyn Croner

Community & Media Manager at LEAP Amp

Greater Indianapolis

Summary

Hi there! I am a Community & Media Manager who values creativity and thinking outside the box for my accounts in both a paid and organic social media environment. I am a well rounded individual who has various experiences in account management, social media management, content writing and market/product research.

Experience

LEAP Amp

4 years 6 months

Community & Media Manager

May 2021 - Present (4 years 1 month)

Indianapolis, Indiana, United States

Social and Paid Media Intern

December 2020 - April 2021 (5 months)

Indianapolis, Indiana, United States

The McKinley Avenue Agency

1 year 9 months

Account Director

January 2019 - May 2020 (1 year 5 months)

Muncie, Indiana Area

- Developed extensive, year long proposals for current clients to ensure specific advertising goals were being met.
- Strategized new tactics for the agency's annual community based contest to generate more awareness and engagement.
- Maintained transparency and communicated frequently with eight current clients to build and sustain a positive client-agency relationship.
- Held weekly AD + sales team meetings to ensure monthly goals were being met by providing prospective client research and updated prospect lists.

Creative Team Intern

September 2018 - December 2018 (4 months)

- Created most successful social media contest to the agency's date which generated over 20,000 impressions.
- Assisted PR Team with social media copy, strategy and scheduling using Facebook and Twitter.
- Generated engaging slogans for promotion of agency's annual housing fair.
- Aided Marketing Team by attending and contributing at weekly promotional events on campus.

Alpha Phi Delta Rho

Executive Administrator

November 2018 - November 2019 (1 year 1 month)

Ball State University

- lead member Initiation
- developed Alpha Phi's goals and accreditation
- communicated frequently with members
- attended New Member Education meetings
- documented chapter attendance and points

redpepper

Client Services Intern

May 2019 - August 2019 (4 months)

Greater Nashville Area, TN

- Assisted Account Executive and Project Manager by owning deliverables and conducting market/product research.
- Prepped and observed client workshops and was held responsible for capturing big ideas as well as important content during each session.
- Led a brainstorming workshop with Nashville Health and presented extensive social media strategies and tactics to help gain followers and enhance their overall engagement.
- Developed a market/product research brief to assist future interns and current employees to have a streamlined research process.
- Created Keynote decks that recapped client calls, workshops and ongoing projects.

Alpha Phi- Delta RHO

Internal Affairs

November 2017 - December 2018 (1 year 2 months)

Muncie, Indiana Area

- worked closely with VP of Risk

- event planning
- met with vendors to secure beverage, drink, music
- created transportation lists
- oversaw event to ensure they ran smoothly

Bubs Burgers & Ice Cream

Server

January 2016 - March 2018 (2 years 3 months)

United States

Education

Ball State University

Bachelor's degree, Public Relations, Advertising, and Applied
Communication · (2016 - 2020)

Carmel High School

· (2012 - 2016)

Cayman Hubbard

Computer Scientist

Detail-oriented and innovative Computer Science graduate from the University of Kentucky with a solid foundation in utilizing programming languages such as Java, Python, and C++ to develop and implement efficient solutions. Passionate about leveraging my technical skills and creativity to solve complex problems and create a user-friendly software. Eager to bring a commitment of excellence in any role that I am given the opportunity.

✉ caymanhubbard@gmail.com

☎ (502)330-3782

📍 Lexington, United States

🌐 [linkedin.com/in/cayman-hubbard](https://www.linkedin.com/in/cayman-hubbard)

EDUCATION

— Bachelors of Science in Computer Science w/ Minor in Mathematics

University of Kentucky

08/2018 - 05/2023

WORK EXPERIENCE

— Front Desk Agent/Auditor Holiday Inn

06/2022 - Present

Managed front desk operations, balanced daily revenue and expense transactions, ensured an accurate end-of-day reports and next-day operation setup.

— Fulfillment Center Warehouse Associate Amazon

05/2021 - 07/2021

Utilized Amazon's warehouse management software to manage inventory, ensuring accurate record-keeping and efficient operations.

— Caterer BlueGrass Catering & Events

07/2019 - 12/2020

Coordinated and executed high-quality catering services for a range of events, including weddings, corporate events, and private parties.

SKILLS

Teamwork

Leadership

Time Management

Problem Solving

SQL

Java

Python

QT

Linux

C++

CERTIFICATES

Foundations of Cybersecurity (06/2023 - Present)

Manage Security Risks (06/2023 - Present)

INTERESTS

Video Games

Music

Artificial Intelligence

Renewable Energy

TIMOTHY M SAUER, PH.D.

PH: 502-387-0440 Email: tsauer@leapagency.com Louisville, KY

SUMMARY:

Experienced behavioral researcher and strategic marketer. Thirteen years of experience in the field of research across a variety of verticals, including: public education, communications, healthcare, and transportation.

WORK EXPERIENCE:

LEAP Agency- Louisville, KY (06/2014-present)

2500 Technology Dr., Louisville, KY 40299. POC ph# 502.212.1290, Michael Wunsch

Director of Research. 2019-present

Manage team of analysts and lead agency direction in consumer research and audience understanding. Harness key insights to inform marketing strategy, creative direction, and UX/UI design.

- Sell research and discovery to prospective and current client stakeholders
- Responsible for development and execution of research department budget
- Hire, train, and manage workflow for team of analysts
- Serve on agency leadership team- conducting relevant research to contribute to strategy and direction

Senior Data Scientist. 2016-2018

Served as the Subject Matter Expert in research methodology, statistical procedures, and data analysis for the agency.

- Directed activity of team of analysts and assistants.
- Led research activity from methodology and design to collection and analysis
- Assisted in development of empirically based marketing strategies
- Responsible for dissemination of key findings and insights to relevant internal and client stakeholders
- Hired, trained, and evaluated team of analysts and assistants

Marketing Research & Analytics Specialist. 2014-2016

Spearheaded the introduction of comprehensive marketing research services. Overhauled performance reporting by moving from simple data report-outs to insight driven storytelling and real-time dashboarding.

University of Louisville: College of Education & Human Development - Louisville, KY (2013-2014)

1905 S 1st St., Louisville, KY 40208. POC ph# 502.852.4014, Namok Choi, Ph.D.

Adjunct Faculty

Served as an instructor for two graduate level courses: Introduction to Research Methods and Applied Statistics.

Independent Research & Evaluation Consultant - Louisville, KY (2009-2014)

Consultant

Provided support in quantitative research methodology, program evaluation, and advanced statistics. Clients included: Signature Healthcare, The Learning House, The Louisville Zoo, Sons of the American Revolution, and The Collaborative for Teaching and Learning

EDUCATION:

University of Louisville, Louisville, KY, **Doctor of Philosophy (Research + Evaluation)- 2012**

Dissertation: Predictors of Student Course Evaluations

Bellarmine University, Louisville, KY, **Bachelor of Arts (Psychology + Crim. Justice) – Summa Cum Laude 2006**

LAURA VALENTINE

PH: 502-472-8303 Email: lauradvalentine@gmail.com Louisville, KY

SUMMARY:

Five (5) years of experience in social science research across the private and public sector, including working as an assistant on two Federal grants awarded to the Louisville Metro Government. In academia, my research focus has often been on Infrastructure, while my private sector experience is focused on developing marketing strategy.

WORK EXPERIENCE:

- My focus is on qualitative/ethnographic methods, but utilized mixed methods approaches to research daily in my current role. I have end-to-end research experience and am able to oversee whole projects as well as work as part of a team.

LEAP Agency – 2500 Technology Drive, Louisville, Kentucky 40299 (10/2018-present). POC Ph# 502-387-0440, Timothy Sauer.

Sr. Marketing Research Analyst

- Responsibilities include research design and development of research protocols, some project and budget management, participant recruitment, primary data collection, data analysis and creation of reports for both internal and external goals.
- Methodologies used include qualitative and quantitative methods (focus groups, interviews, surveys, secondary research).

University of Louisville – 2301 S 3rd Street, Louisville, Kentucky 40291

Grant: Learning How The Community Leads: Evaluating and Informing City-Based Participatory Engagement in West Louisville

Program Assistant and Data Manager (08/2018-08/2019), POC Ph# 502-852-3012, Dr. Angela Storey.

- Responsibilities included assistance with project logistics, secondary research, primary data collection, and presentation of research reports for internal team leads as well as for presentation at academic conferences.

Anne Braden Institute for Social Justice Research (08/2017-05/2018) POC Ph# 502-852-6142, Dr. Catherine Fosl.

- Conducted secondary research for faculty/visiting scholars at the University of Louisville, and helped develop whitepapers, manage resource databases, community-engaged outreach/education campaigns.

Grant: Louisville Farmer's Market Coordination, Access and Capacity-Building Project (06/2016-03/2017), POC Ph# 502-852-6864, Dr. Lisa Markowitz.

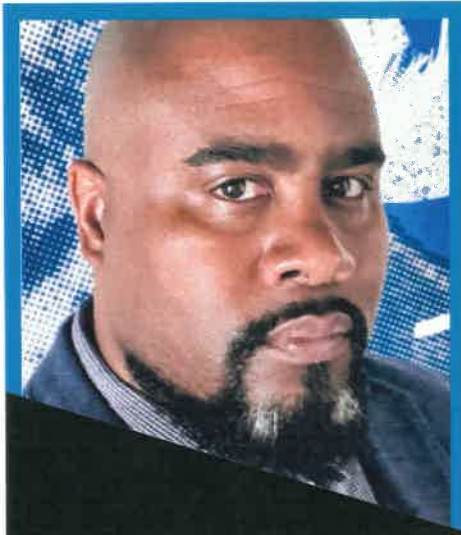
Researcher

- Responsibilities entailed primary data collection through on-site surveys and interviews, participant recruitment, data entry, coding, and analysis using SPSS.

EDUCATION:

University of Louisville, **Master of Arts Degree (MA, Anthropology) 2018**

University of Louisville, **Bachelor of Arts Degree (BA, Anthropology) 2014**



20+ years of experience leading brand and media strategy for Fortune 500 clients and mission-driven organizations

Leads client portfolio growth and campaign outcomes at Leap Group with double-digit efficiency gains and revenue impact

Directed 11-account portfolio at Campbell Ewald and contributed to 70%+ of annual pitch efforts

Managed 5,000+ deliverables annually across enterprise-level campaigns for USAA

Generated 8.5% retail sales lift for Zales through repositioned campaign strategy

WALTER HARRIS

Director of Client Services

LinkedIn: <https://www.linkedin.com/in/walter-harris/>

Walter Harris brings over **20 years** of experience in advertising, brand leadership, and integrated marketing strategy for national and global clients across industries including healthcare, financial services, automotive, advocacy, and consumer goods.

Current Role

Leap Group / (amp) – Louisville, KY

Vice President, Director of Client Services 2023–Present

- Oversees strategic direction and execution across a portfolio of 10+ clients, resulting in a 22% YoY increase in client retention and expanded scopes across healthcare, advocacy, and financial sectors
- Led cross-functional campaign development that contributed to a 30% lift in engagement and 18% lower CPA across paid media programs
- Played a central role in winning \$1.8M+ in new business within the first year by developing proposal strategy, pitch frameworks, and stakeholder messaging
- Implemented an account operations structure that improved project delivery timelines by 35%, while maintaining 95%+ client satisfaction across deliverables

Experience Prior to (amp)

Campbell Ewald – Detroit, MI

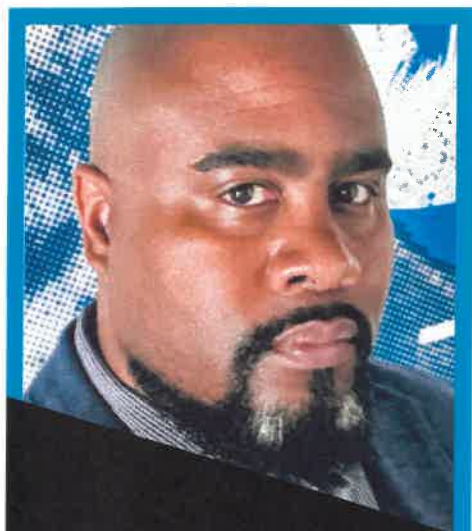
Group Account Director 2019–2023

- Led the Modern Marketing portfolio of 11 accounts, including Trinity Health, ShiftMed, Allspring, Lear, and Aretha Franklin Amphitheatre
- Managed brand strategy, creative oversight, scope development, and team onboarding while deepening client relationships
- Contributed to ~70% of annual new business pitches, aligning strategic vision and creative approach
- Co-chaired ExCEllence, the agency's African American employee resource group

The Lee Group – Houston, TX

Vice President, Director of Client Services 2017–2019

- Directed agency client services while leading RFP development and new business presentations
- Secured 7 of 10 client wins, including Broadway Bank and The Menninger Clinic
- Managed procurement negotiations and SOW development for new and existing clients



20+ years of experience leading brand and media strategy for Fortune 500 clients and mission-driven organizations

Leads client portfolio growth and campaign outcomes at Leap Group with double-digit efficiency gains and revenue impact

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Generated 8.5% retail sales lift for Zales through repositioned campaign strategy

WALTER HARRIS

Director of Client Services

MullenLowe – San Antonio, TX / Boston, MA

Group Account Director (USAA – Brand/Enterprise) 2016–2017

- Co-led a team of 80+ FTEs responsible for 5,000+ annual deliverables across multiple verticals
- Oversaw brand marketing and enterprise alignment across USAA's insurance, banking, and retirement services
- Ensured seamless agency transition during account acquisition from Campbell Ewald to MullenLowe

Campbell Ewald – San Antonio, TX

Group Management Supervisor / Management Supervisor 2011–2016

- Launched USAA's "Policy Number" campaign, repositioning messaging to connect with civilian markets
- Directed upper-funnel media strategy across financial products and sponsorships
- Led alignment of brand marketing with NFL partnership and military appreciation themes
- Built cohesive campaign execution across creative, media, and account teams

GSD&M – Austin, TX

Senior Account Supervisor 2006–2011

- For Zales: Spearheaded campaign that delivered an 8.5% YoY lift in holiday same-store sales after years of decline
- For AARP: Developed strategic messaging for the Divided We Fail initiative, elevating public awareness
- Repositioned L.L.Bean's brand through revitalized creative and cross-platform campaign rollouts
- Managed forecasting and billing for national accounts across multiple business lines

EXPERTISE: Strategic brand leadership, integrated campaign development, multicultural marketing, client relationship management, cross-functional team leadership, business development, scope and fee negotiation, and performance analytics.

EDUCATION: Bachelor of Science in Broadcast Production (Minor in Marketing), Eastern New Mexico University