SaltedStone

WEBSITE REDESIGN

SCOPE + AGREEMENT

Prepared for **COMPANY NAME** | Date Here

SaltedStone

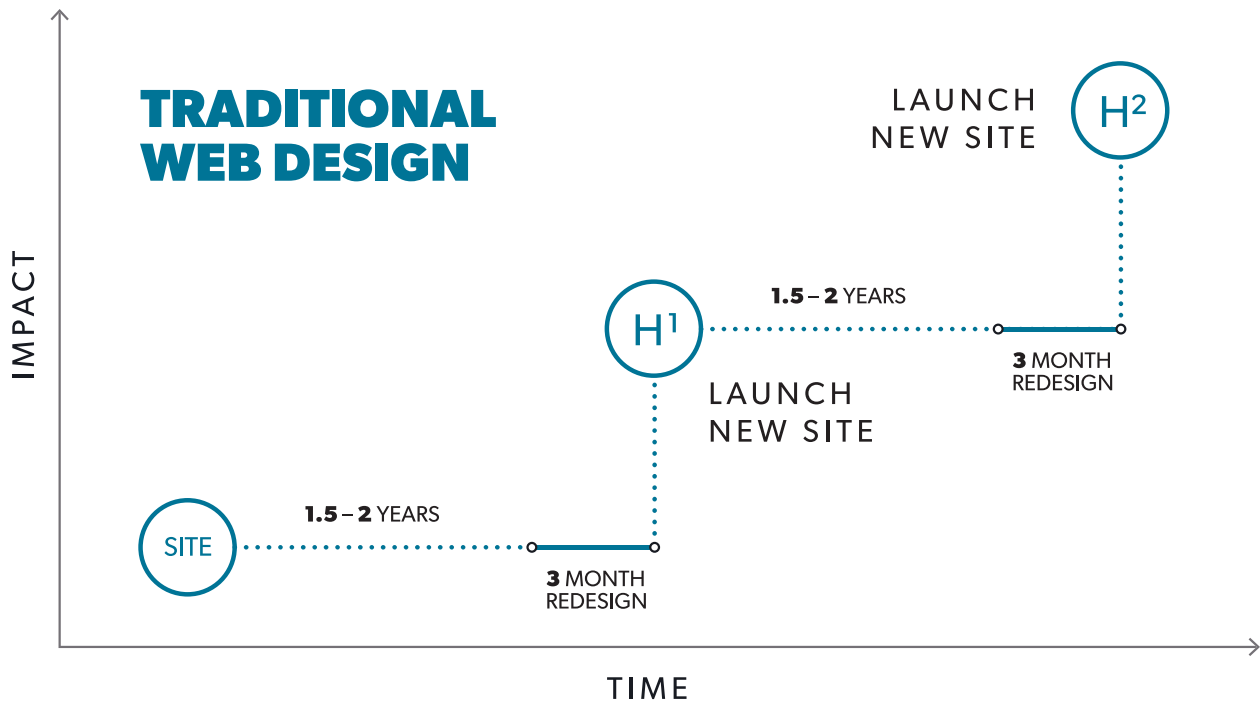# TABLE OF CONTENTS

INTRODUCTION

Salted Stone (S2) has substantial experience delivering high-caliber websites for clients in the Technology sector, as well as unrivaled command over the HubSpot COS platform by virtue of employing two former HubSpot Senior Support Engineers and six (6) COS certified developers.

As a result, we believe that we present a strong case for partnership as regards the COMPANY NAME website redesign project and are pleased to submit our proposal for consideration.

Concurrent with the website redesign, S2 will formulate and professionally execute a marketing game plan that seeks to drive value for the COMPANY NAME via a strategic Inbound Marketing program aimed at improving performance across the complete visitor journey: Attract, Convert, Close and Delight.

Ultimately, Salted Stone hopes to become a trusted partner and an extension of the COMPANY team, operating as marketing infrastructure in a variety of perspectives to help ITR achieve its overall business objectives.

Given the inherent synergies between the website and inbound marketing program, S2 will redesign the COMPANY website in a manner that seeks to integrate the basic tenets of lean / agile development. By doing so, S2 will minimize many of the risks inherent to the traditional website design process and – instead – treat the COMPANY NAME website as an iterative, continuously evolving marketing platform.

TRADITIONAL WEB DESIGN

IMPACT

SITE

1.5 – 2 YEARS

3 MONTH REDESIGN

H¹

LAUNCH NEW SITE

1.5 – 2 YEARS

3 MONTH REDESIGN

H²

LAUNCH NEW SITE

TIME

Whereas traditional approaches to website design would involve a new ~3 month development cycle every couple of years that results in a new website, S2 proposes an innovative new approach called Growth Driven Design (GDD). GDD embraces agile methodologies and focuses on developing a data driven website that is constructed with adaptability and flexibility in mind.

One of the principal tenets behind this approach hinges on mitigating the risk associated with designing a non-data driven website that leverages popular trends and that leverages decisions that are, ultimately, based on unproven hypotheses. In many cases, decisions are made based on popular trends without any real visibility into what the impact of those decisions will be. It is not until post-launch that an analysis of results occurs, and at this stage it is oftentimes too late to bring a project back to the drawing board.
website as an iterative, continuously evolving marketing platform.

TRADITIONAL WEB DESIGN
VS GROWTH DRIVEN DESIGN
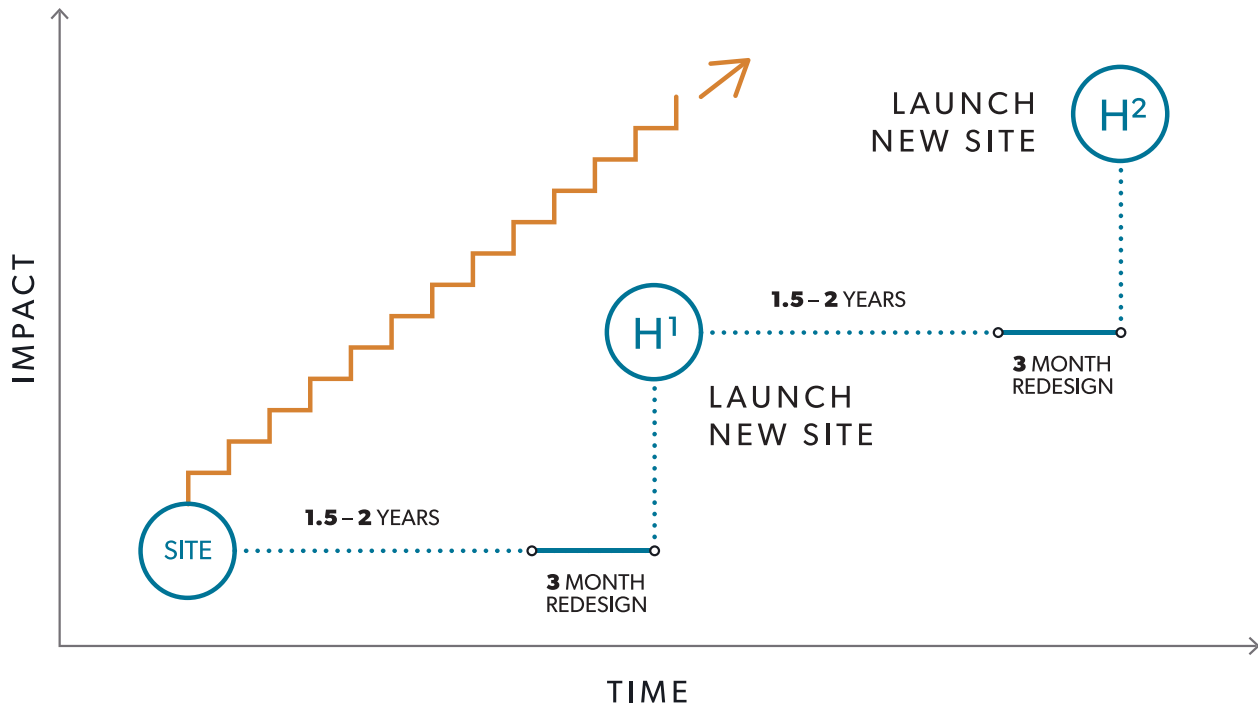
GDD IS BASED ON THREE CENTRAL PILLARS:

◆ **Minimize risk** – let the data dictate ongoing design decisions

◆ **Continuously learn and improve** – sites are not static and design can be dynamic based on data

◆ **Inform marketing and sales** – take findings from the design process and leverage them within marketing + sales initiatives

The result is a website that is continuously evolving and built in stages according to assumptions that are validated or invalidated based on data, and where features are rolled out in a manner that both inform and are informed by experiences and learnings from the marketing and sales teams.

This approach increases the potential impact that the COMPANY website can have on business objectives, and minimizes the risk inherent to a website redesign.

STRATEGY

The site project will commence with an examination of:

Goals & Personas – What is COMPANY trying to achieve? What impact is the website trying to make on the business and why is it important? Who are the people that are coming to the website and who are the people that COMPANY is interacting with?

Website & Analytics Audit – Quantitative analysis of COMPANY analytics data (as relevant) to determine how audience is currently interacting with website. Where are visitors dropping off of funnel? What areas of site seem to resonate? Where are current users of the current site having points of pain?

User Experience Research – Ask questions of representative Personas to help inform perspective of what sort of website content will be most effective.

Fundamental Assumptions – Pursuant to above exercises, certain baseline assumptions can be made about: value propositions; why visitors are coming to the website; where they're coming from; what the points of pain are.
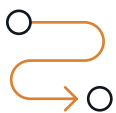
Global & Page Strategy – These fundamental assumptions become the foundation for global and page-by-page based strategies.
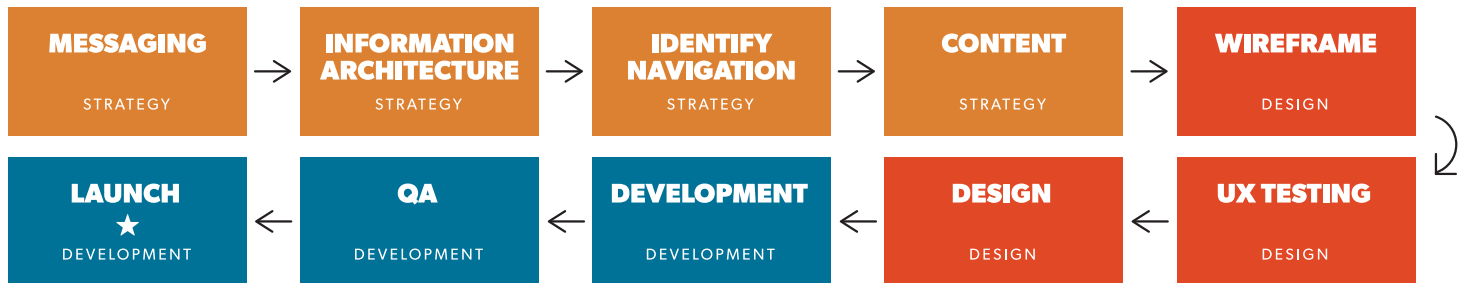
Brainstorm Wishlist – coming out of the research phase, with an understanding of personas/ goals/etc., and having formulated strategies at both the micro and macro levels, the S2 and COMPANY teams should be able to formulate a comprehensive wishlist of ideas and specifications around website pages, sections, features, etc. for inclusion in the ideal website. Many of these wishlist ideas will already be present in the RFP document, but more will be identified and discovered throughout this Strategy process.

LAUNCH PAD WEBSITE

Once the Brainstorm Wishlist has been completed, and a full inventory of desired functional and feature inclusions has been identified, the S2 and COMPANY teams will perform an 80/20 analysis (e.g., "What are the 20% of items that will make 80% of the business impact?") on that inventory of wishlist items.

These items will be set aside and then prioritized to identify the items that are mission-critical to launch a website. These wishlist features will be identified for inclusion in the sprint towards a Launchpad Website.

At this point, the first sprint cycle will commence towards the completion of the Launch Pad website and will follow this basic workflow:

MESSAGING	→	INFORMATION ARCHITECTURE	→	IDENTIFY NAVIGATION	→	CONTENT	→	WIREFRAME
STRATEGY		STRATEGY		STRATEGY		STRATEGY		DESIGN

LAUNCH ★	←	QA	←	DEVELOPMENT	←	DESIGN	←	UX TESTING
DEVELOPMENT		DEVELOPMENT		DEVELOPMENT		DESIGN		DESIGN

During the development cycle for the Launch Pad website, efforts will be made to identify the data collection methods required for validation our fundamental assumptions.

The underlying goal of the Launch Pad website is to launch quickly in order to start making data driven improvements to the website.

GROWTH DRIVEN DESIGN

Once the Launch Pad site has been completed, attention will be turned to the remaining wishlist items. Wishlist items will generally fall into one of four top-level categories:

Boost Conversion	Improve User Experience	Personalize to the User	Build Marketing Assets
Conversion points	Navigation	Personalization	Tools
User path	Ex: Blog Layout	By interests	Marketing Resources
Testing Value Props	UI Improvements	By Device or country	Directories / Listings
Split Testing	Mobile Experience	By previous actions	SEO Focused Asset

The inventory of wishlist action items will be evaluated in light of basic hypothesis statements to determine the order by which the items will be deployed to the website. The hypothesis statement will identify the (a) persona and (b) page being impacted as well as the (c) status quo / control variable versus the (d) new variable being introduced. Finally, it will (e) suggest the expected impact and (f) the reasons fueling those expectations.

HYPOTHESIS A

For [Marketing Mary] visiting the [Pricing Page], we believe changing [Enterprise Pricing] into a ["Request a Quote"] will [boost MQL conversion from this page by 10%]

We believe this to be true because [research or previously validated assumption]

Once the Launch Pad site has been completed, attention will be turned to the remaining wishlist items. Wishlist items will generally fall into one of four top-level categories:

- ◆ Expected impact
- ◆ Required effort
- ◆ Impacted metrics (for measurement)
- ◆ Definition of completion (to measure impact definitively)

All open wishlist items receive this treatment. Once all wishlist action items have been identified and hypothesis statements have been written, they will be prioritized according to their presumed impact:

HYPOTHESIS A

HYPOTHESIS B

HYPOTHESIS C

HYPOTHESIS D

HYPOTHESIS E

**PRIORITIZE BY
EXPECTED IMPACT
HIGH, MEDIUM, LOW**
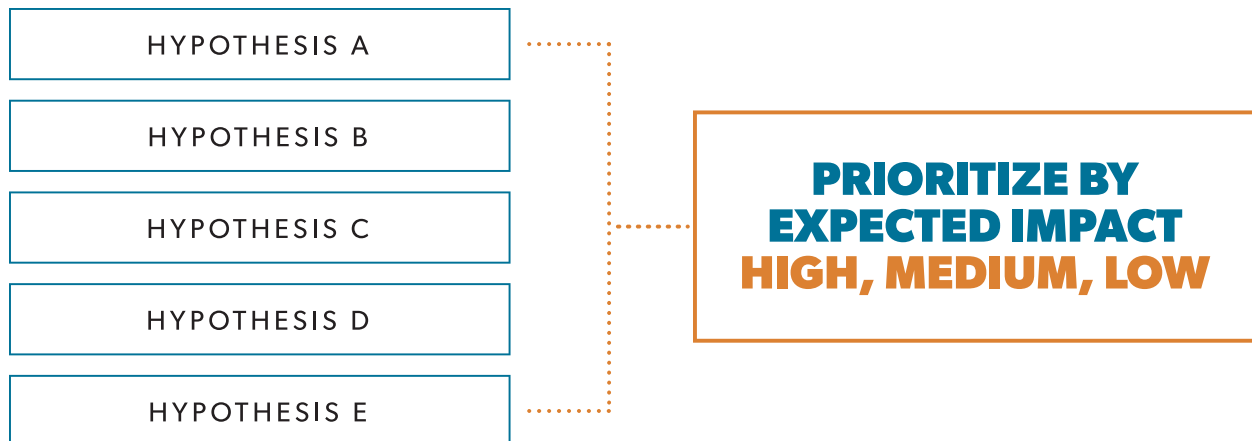
Wishlist items are then evaluated for inclusion in monthly sprint cycles. These sprint cycles are user-centric and seek to continuously increase the effectiveness of the website from the perspective of the website user. Cycles commence with a Planning phase, where the wishlist items for inclusion in that cycle are identified from the inventory of outstanding wishlist action items. The Development phase commences on the current sprint's wishlist items. Data is aggregated from the completed work activities to inform a Learning phase whereby the hypothesis statements are either validated or invalidated. Lastly, the Transfer phase communicates learnings to stakeholders on the marketing and sales teams to help improve overall processes and approach. Each sprint cycle contains Plan, Develop, Learn and Transfer phases.
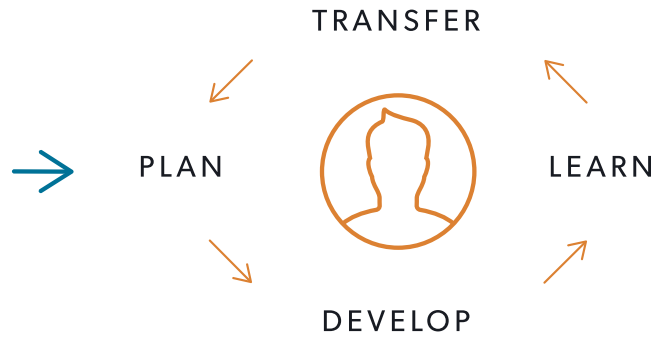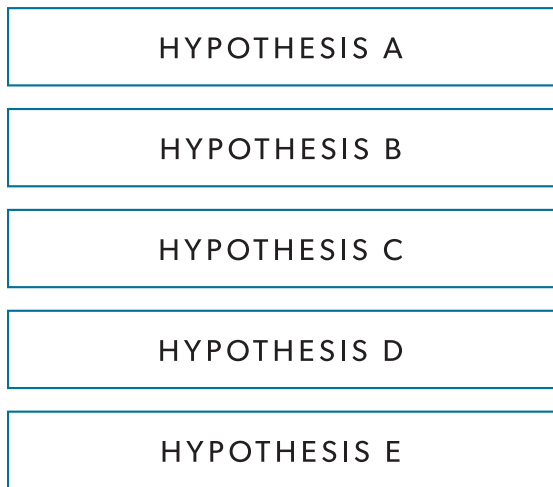
PLAN PHASE

- Performance of control sample vs. goals sought by variation
- Additional data or research as needed
- Brainstorm + update wishlist
- Impact, effort, metrics, completion
- Prioritize sprint cycle

DEVELOPMENT PHASE

- Implement sprint activities
- Collaborate on completing tasks
- Setup validation tracking
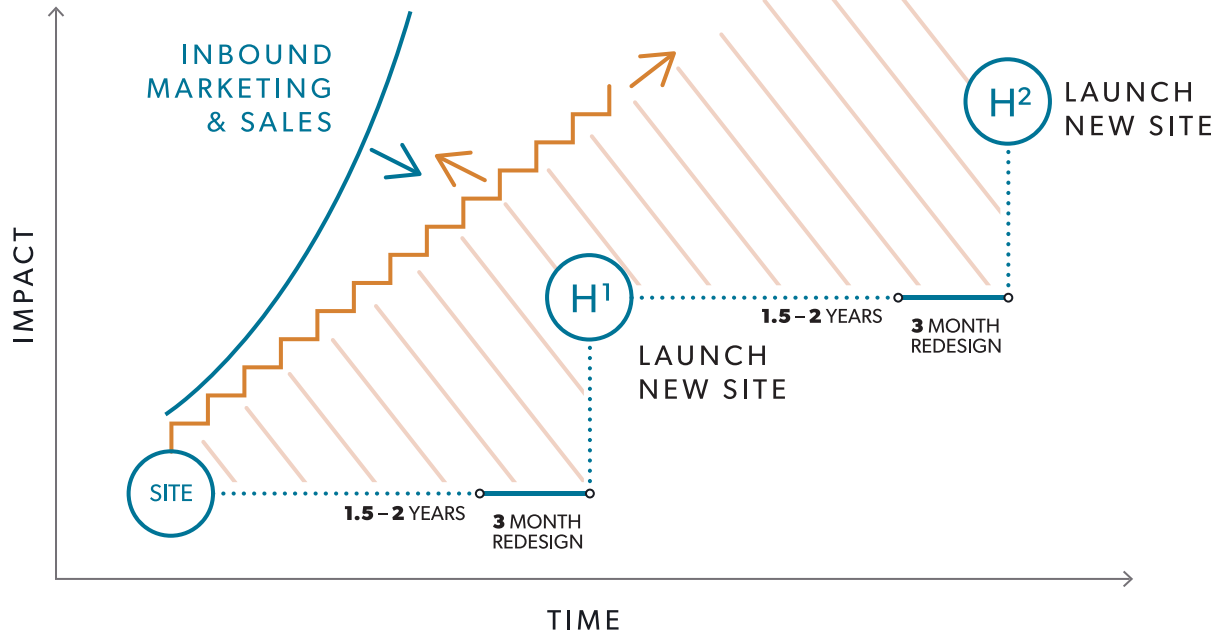- Develop marketing campaign (where appropriate, to drive users to the changes that have been made)

LEARNING PHASE

- Run experiment
- Review data
- Validate or invalidate assumptions
- Report on learnings

TRANSFER PHASE

- Transfer what was learned to improve marketing and sales
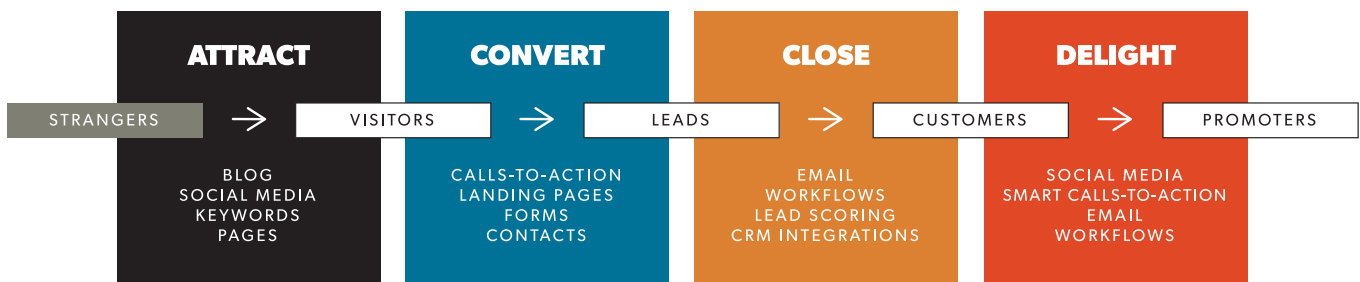- Create recommendations
- Educate other teams

TRADITIONAL WEB DESIGN
VS GROWTH DRIVEN DESIGN

IMPACT

INBOUND MARKETING & SALES

H² LAUNCH NEW SITE

1.5 – 2 YEARS   3 MONTH REDESIGN

H¹ LAUNCH NEW SITE

1.5 – 2 YEARS   3 MONTH REDESIGN

SITE

TIME

INBOUND MARKETING

Salted Stone will develop and deploy a strategic Inbound Marketing program focused on driving business value for COMPANY NAME. The program focuses on attracting visitors, converting visitors into leads, closing leads into customers, and reducing customer churn (or increasing lifetime value) with retention focused campaigns driven by compelling and genuinely helpful content.

Inbound Methodology is comprised of four distinct phases. Our strategy at any given point in time will focus on the phase that we collaboratively determine will be of highest impact.

ATTRACT	CONVERT	CLOSE	DELIGHT
STRANGERS → VISITORS	→ LEADS	→ CUSTOMERS	→ PROMOTERS
BLOG SOCIAL MEDIA KEYWORDS PAGES	CALLS-TO-ACTION LANDING PAGES FORMS CONTACTS	EMAIL WORKFLOWS LEAD SCORING CRM INTEGRATIONS	SOCIAL MEDIA SMART CALLS-TO-ACTION EMAIL WORKFLOWS

SaltedStone

The Inbound Marketing program is separated into two phases, Setup and Management.

SETUP

The Setup phase will involve four concurrent workflows, loosely organized into the following silos:

- **Strategy** – personas, campaign plan, content map, workflows, lead scoring, etc.
- **Design** – landing pages, collateral layout, email templates, etc.
- **Content** – collateral assets, emails, social posts, etc.
- **Tech** – landing pages, list setup, platform integrations, site integration, etc.

Over the course of 2-months, Salted Stone will work through a variety of setup tasks focused on ensuring that COMPANY's program is geared for success. The 2-month setup phase will conclude with the launch of COMPANY's first Campaign within HubSpot.

Setup activities will include:

- Establish SMART goals (specific, measurable, attainable, relevant, time limited) in collaboration with COMPANY team.
- Develop buyer personas.
- Identify content offers for each persona at each lifecycle stage (e.g., awareness, consideration, decision).
- Develop campaign plan around first content offer.
- Draft and lay out first content offer.
- Design and deploy associated landing page, blog, CTA graphics, etc.
- Design and build email template.
- Integrate with CRM as possible.
- Create initial marketing segments and draft/integrate nurture-focused email workflows.
- Perform SEO keyword research.
- SEO Audit (design/tech).
- Integrate on-page SEO recommendations.
- Integrate into existing frontend website as needed.
- Launch first campaign.

SaltedStone

The Inbound Marketing program is separated into two phases, Setup and Management.

ONGOING

Ongoing management activities will be fluid contingent upon needs as assessed in real-time, but the baseline framework of the inbound marketing program is based upon the following:

◆ Monthly reporting and campaign optimization.

◆ 2x weekly blog posts, optimized for organic search targets.

◆ Daily social media promotion as outlined in campaign plan.

◆ 1 premium content offer (e.g., eBooks, case study, white paper, etc.) generated on a Quarterly basis.

◆ 1 monthly ad hoc e-blast.

◆ 1 monthly nurturing campaign with associated CTAs, workflows, segmented lists, etc.

Over the course of 2-months, Salted Stone will work through a variety of setup tasks focused on ensuring that COMPANY's program is geared for success. The 2-month setup phase will conclude with the launch of COMPANY's first Campaign within HubSpot.

Management activities will be dictated by evolving client need, and will be defined in bi-weekly or monthly "sprint" intervals that take into account where COMPANY is currently meeting with success or requiring additional effort in order to succeed.

Salted Stone will monitor, manage, optimize and report on the Inbound Marketing program in collaboration with COMPANY's internal stakeholders. The Inbound Marketing program will be structured around a "points-based" system, to ensure flexibility and responsiveness to the ever-evolving a shifting ITR landscape.

Each work activity is assigned a fixed-point total (e.g. blog post = 3 points) based on value creation rather than hourly estimates, so that ITR knows exactly what it will receive in any given month and avoids the downside of hourly-based fees whereby the client oftentimes winds up paying for agency inefficiencies.

Regardless of how much time is invested to complete each project, the point totals remain constant, thereby ensuring that clients get the full value of every dollar spent.

SaltedStone

Point allocations are defined at the beginning of each sprint period, and are based on an agreed-upon scope. This allows for more efficient and accurate forecasting and planning.

Points can be allocated to any of the variety of distinct activities associated with Inbound Marketing. Available points are planned monthly and reallocated as needed if events arise that require shifting attention mid-stream.

Here is a representative breakdown of activities and associated points. While it is not possible to conceive of every possible activity, and while points may vary based on actual scope associated with any particular activity, this provides a general breakdown.

Type	Activity	Points	Frequency
Email	Email Blast	2	Each
	3-Part Lead Nurturing Email	6	Each
Social	Scheduled Social Shares (15)	2	Each
	Social Monitoring and Engagement	4	Monthly
Website	Website Management	Varies	Each
	Content Upload	1	Each
	Landing Pages	2	Each
Content	Premium Content (e.g., eBook)	30	Each
	Blog Post	3	Each
Campaign	Workflow	3	Each
	List Creation	4	Each
	Campaign Creation	1	Each
Strategy	Lead Scoring	8	Monthly
	Monthly Report & Game Plan	8	Monthly
	Campaign Management	8	Monthly

Our approach to structuring monthly sprints will emphasize on-demand and proactive response to then-current needs across the various inbound marketing phases. Sprints will highlight activities that are collaboratively determined to have the best chance at generating impact that aligns with the achievement of defined SMART goals.

NOTES & TERMS

Frontend site to be developed in the HubSpot COS and will be constructed in a manner so that the majority of maintenance and update activities can be performed by the Client.

Site will be fully integrated according to defined touch points with the marketing software platform.

Client to provide all web copy. Copy is a prerequisite for the design of any individual page template. S2 to provide limited editorial oversight as a part of this scope.

Site to be designed with (3) three responsive states for: desktop, vertical tablet, and smart phone devices.

Browser compatibility will be ensured for IE9+, Firefox, Chrome, Safari, Opera, iOS and Android.

Salted Stone to provide access to project management interface to facilitate and aggregate communications with Client.

Client will be assigned an account manager. This account manager will act as the primary point of contact with Salted Stone personnel and will respond to all communications within 24 hours on workdays, unless otherwise notified (and subject to reasonable exceptions).

Salted Stone will require one point of contact during the Contract for clarifying requirements for design, key features, usability and maintenance issues. Salted Stone requires this person be available to answer questions arising from the project within 48 hours on workdays (subject to reasonable exceptions), and to have authority to make design and related decisions on the system.

Salted Stone will provide patches and bug fixes for any bugs or issues included in the scope of this contract reported within the grace period of no more than 30 days following the date of project completion. All bug fixes outside of the project scope or after the grace period are the responsibility of the client.

Although Salted Stone makes every effort to provide secure Finished Product(s), due to the nature of rapidly advancing technology, Salted Stone can in no way guarantee that the Finished Product(s) will not be subject security breaches. Salted Stone recommends the use of strong passwords and the observance of standard security practices. The Client is solely responsible for tracking software updates.

Salted Stone is not responsible for any delay or defect caused by separate third party or the Client's in-house teams.

Salted Stone maintains internal backups of active project code and design files. This backup system is not intended as a solution for the Client, rather as a code archive through the duration of this Contract. While the Salted Stone backup system is fully redundant, it is not guaranteed and does not support any content produced by the Client. Client is solely responsible for the Backup and Restoration of the Finished Product(s) and any associated data.

Net 30 payment terms.

12-month term.

Either party may cancel this Agreement after six (6) months with thirty (30) days written notice. In the event that the Client cancels the Agreement, it is responsible for payment through the then current month + the 30-day period on a prorated basis, and is not subject to any additional termination fees.
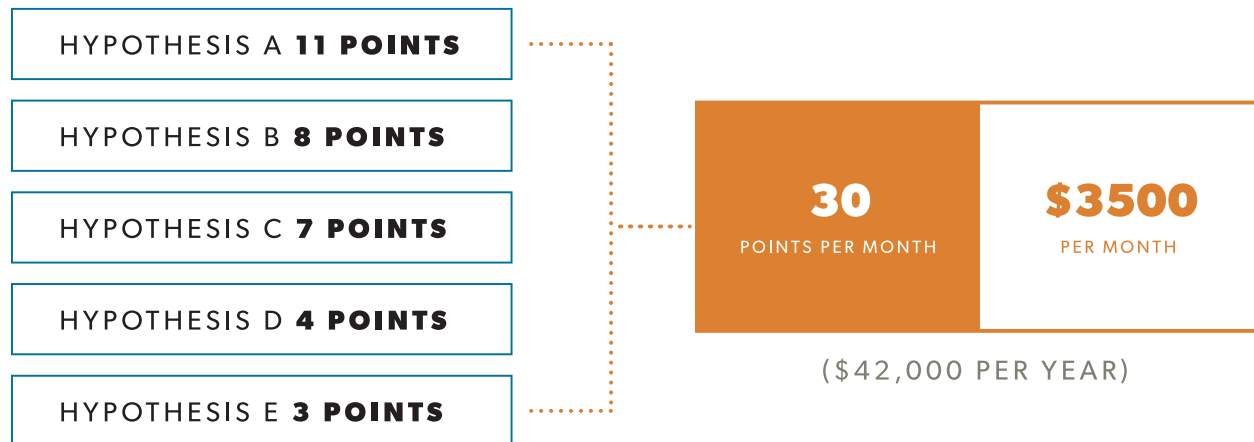
FEES + TIMELINE

Growth Driven Design Monthly $3,500.00 ($42,000 per year)

Inbound Marketing Monthly $5,000.00 ($60,000 per year)

Launch Pad website in approximately fourty-five (45) business days.

Monthly sprint cycles structured around "points" based system. To illustrate:

◆ Growth Driven Design - $3500/mo. = 30 points/mo.

◆ Inbound Marketing – $5000/mo. = 40 points/mo.

◆ Each hypothesis or work activity is graded at a specific number of points based on the resources required to integrate.

◆ In the Plan Phase of each sprint, wishlist action items are selected around the aggregate number of available points. These action items define the upcoming sprint cycle.

GROWTH DRIVEN DESIGN

| HYPOTHESIS A **11 POINTS** |

| HYPOTHESIS B **8 POINTS** |

| HYPOTHESIS C **7 POINTS** |

| HYPOTHESIS D **4 POINTS** |

| HYPOTHESIS E **3 POINTS** |

30 POINTS PER MONTH | **$3500** PER MONTH

($42,000 PER YEAR)

Salted Stone

TEAM DETAILS

Salted Stone is a fourteen person team split between creative, technology and marketing personnel. The below-referenced personnel represent team leads of the departments that will be involved in producing the work associated with this project:

JOHN DOE

Description of John's expertise

JANE DO

Description of John's expertise

JOHN DOE

Description of John's expertise.

JANE DO

Description of John's expertise

JOHN DOE

Description of John's expertise

JANE DO

Description of John's expertise

JOHN DOE

Description of John's expertise

EXPERIENCE + PORTFOLIO

Salted Stone has considerable experience building websites for Technology companies. Nearly all of our clients are B2B. Our Technology portfolio includes:

INCENTIVE

incentive-inc.com

VOREX

vorex.com

CONNOTATE

connotate.com

MAGPI

home.magpi.com
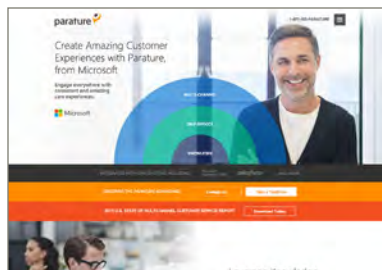
PARATURE

parature.com

However, our experience is quite horizontal in nature and demonstrates our general capabilities across any industry:

SANTA ANITA PARK

santaanita.com

WEDGEWOOD

wedgewood-inc.com

GROSSMAN LAW

injuryrelief.com
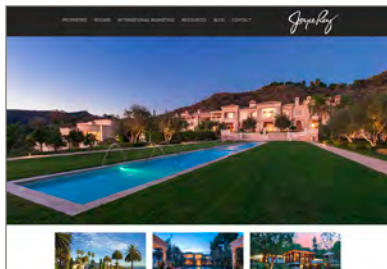
JOYCE REY

joycerey.com
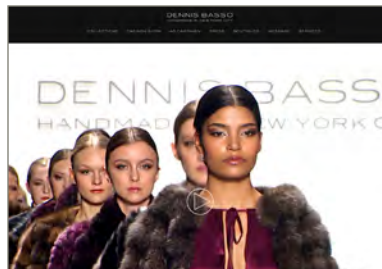
DENNIS BASSO

dennisbasso.com

GLOBECON FREIGHT

globeconfreight.com

SaltedStone

We also have pertinent experience creating product marketing and demo videos, as well as videos of all types:
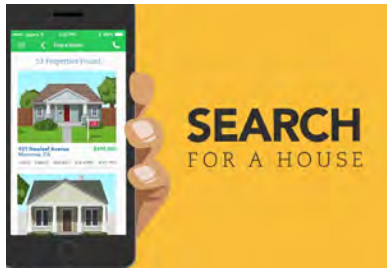
NEW LEAF (0:30)

MYDIGITALSHIELD (2:00)

Hermes Award

VOCUS (0:60)

Telly Award

NEEBULA (2:30)
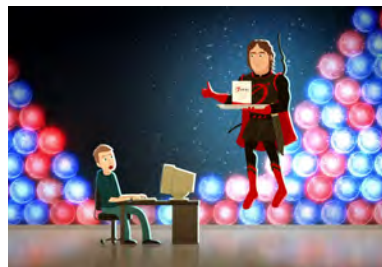
STARVIEW (1:30)

GROSSMAN LAW (0:30)

Television Commercial

PURCHASE GREEN (0:30)

Television Commercial

SaltedStone

COMPANY LOCATION INFO

HEADQUARTERS 419 S Myrtle Ave. | 2nd Floor | Monrovia, CA 91016

SATELLITE OFFICE 3110 Main St. | The Annex | Santa Monica, CA 90405

ABOUT US

We're an award-winning, full-service agency and HubSpot Platinum Certified Agency Partner with over 200 clients served, including regional leaders and national brands.

WE'VE WON TROPHIES FROM:

OUR CLIENTS INCLUDE:

TESTIMONIALS

"The Salted Stone team rules. Without the G2 of Salted Stone, Neebula would not have been acquired for $100m. The web was our storefront ... and the storefront attracted buyers. In addition to your content management services provided, the inbound optimizations to the website were responsible for driving 36% of our MQLs. I can't thank you enough. You guys are the best!"

> *– Bob Johnson, CMO, Neebula (Acquired by ServiceNow, July 2014)*

"Salted Stone makes us feel like we are their only client by delivering on short deadlines with top quality work. You can tell they take great pride in the quality of their work... also, their Christmas Party is awesome."

> *– Andrew Arthur, Director of New Media, Santa Anita Park*

"This is one of the best creative teams I've yet to work with. They take a deep pride in the work they do, and treat the ideas you bring to the table with incredible care. They also know when to challenge an idea - and even more, when to surprise you by building on one. I can't recommend this team more."

> *– David Schulman, Director of Creative Marketing & Business Development, Med School Tutors*

"We entrusted Salted Stone with the task of delivering a technically challenging custom blog implementation under very tight time constraints. Mike and his team delivered with high fidelity to our mocks and no sacrifices in functionality. We would work with them again without hesitation."

> *– Keith Weissglass, Director of Marketing, Mavenlink*

"When we first engaged with Salted Stone we had some very lofty goals. Basically I had 30 days to re-brand my company after another marketing company screwed everything up. Not only did they get us fully integrated with HubSpot, they refreshed our website our logo, designed brochures, booth displays and so much more just in time for us to re-launch our software solution at a huge conference. Not only did they get everything done in record time, because we had to get things printed, they communicated and worked over time to make sure our company was ready to launch our re-brand. I will say without a doubt that the entire team at Salted Stone is nothing short of amazing and completely dedicated to their total overall success of their client."

> *– Stuart Selbst, SVP Business & Channel Development, Vorex*

SaltedStone

CLIENT REFERENCES

CLIENT REFERENCE

Job title

Business Name

email

phone

CLIENT REFERENCE

Job title

Business Name

email

phone

CLIENT REFERENCE

Job title

Business Name

email

phone

CLIENT REFERENCE

Job title

Business Name

email

phone

SIGNATURES

If Client and Salted Stone are unable to resolve their differences on the question of any fee, and/or expenses, they hereby agree to make a good faith effort at resolving their disputes. If the dispute cannot be resolved, Client and Salted Stone agree to mediation with a mutually agreed-upon mediator.
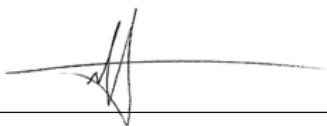
IN WITNESS WHEREOF, the parties have caused this Services Agreement to be executed by their duly appointed representatives.

Name: _____

Signature: _____

Date: _____

Mike Skeehan
Salted Stone, Inc.

_____

July 16, 2015