



McKNIGHT BRAIN
RESEARCH FOUNDATION
Preserving memory, enhancing life

Proposal for Digital Marketing & Communications

RFP Response to the Three-Year Communication Plan

March 31, 2023

WHEREOWARE

Hello!

It is our pleasure to present the following RFP response to the selection committee at McKnight Brain Research Foundation. We value our longstanding partnership and appreciate the opportunity to continue to collaborate with you as an extension of your team.

We are confident our extensive experience coupled with the knowledge gained having worked with you over the past several years uniquely qualifies us to efficiently and effectively deploy and execute a robust digital marketing and communications program to elevate MBRF and propel you forward as an organization, in accordance with your goals.

We welcome any questions and look forward to working with you on this journey!

Breadth of Capabilities

As a full-service agency and digital partner for our clients, Whereoware possesses **an array of capabilities across strategy, digital activation, earned and paid media, creative and tech enablement services.**

Depth of Experience

Whereoware also brings a depth and breadth of experience working with non-profit organizations, associations, government entities in addition to large fortune 500 companies.

Strength of Approach

As a trusted partner, we work with our clients from initial strategy and activation through to continued optimization ensuring goals are being achieved and exceeded.

Let's Get Started!

Contents

Here is a quick highlight of the topics we will be covering in this proposal.

- 6** Our Vision for MBRF
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McKnight Brain Research Foundation Goals



Elevate public awareness and understanding of cognitive aging and brain health through a shared human connection with McKnight Brain Research Foundation, the leader in this field.

CREATE BRAND AWARENESS + BRAND ENGAGEMENT

01 Drive traffic to the MBRF website and social media channels

RESULT: Brand Recall & Positive Brand Perception

02 Increase search engine rankings for relevant keywords

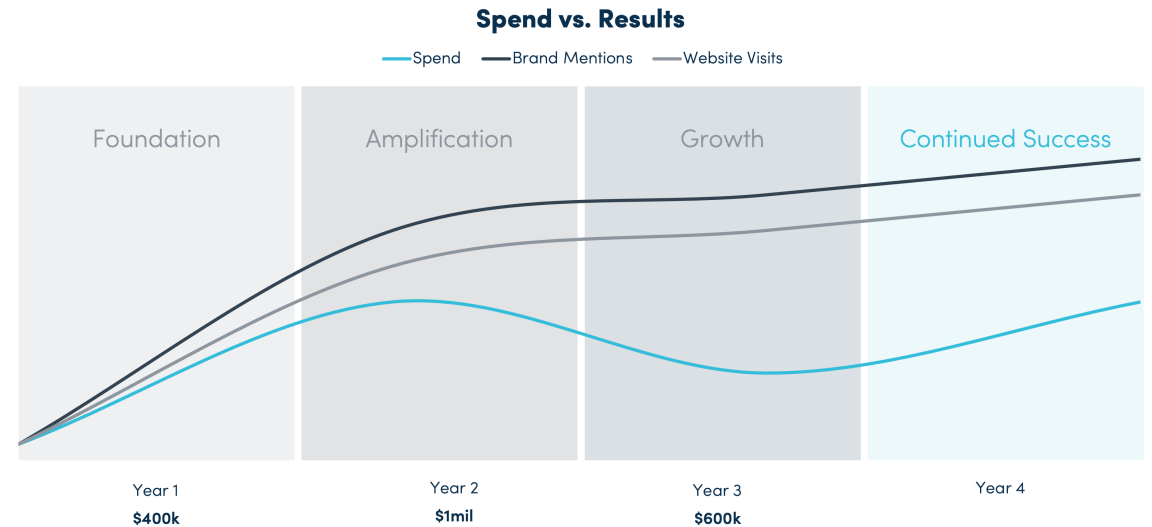
RESULT: Keyword Rankings & Organic Site Traffic

03 Provide educational resources for the public to maintain brain health

RESULT: Website Pageviews, Email Sign-ups, Social Channel Engagements

04 Empower primary care providers to proactively communicate with patients and educate them about brain health using evidence-based practice.

RESULT: PCP Brand Mentions/Backlinks



The image above represents the anticipated relationship of results to spending over the course of the full Program. This model aligns with our recommended approach leveraging the "high" budget. Refer to the **Investment** section of this proposal for the full-scale version.

Executive Summary



As an established partner of MBRF for the past several years, we want to highlight what we have accomplished in the past, are working on in the present, and how we envision the future.

1

WHERE WE BEGAN

Lacked cohesion with university institutes

Outdated brand identity and visuals

Poorly functioning website

Audience was limited to researchers

2

WHAT WE'VE DONE

Established a flexible and contemporary brand identity

Built and launched a lightweight new website

Created marketing materials including the launch of a quarterly newsletter

Strategically and operationally supported campaign with Dr. Sanjay Gupta

3

WHAT WE'RE DOING

Activation and brand initiatives including:

Mental Health Awareness Month campaign with paid media, PR, and new content

Persona development to guide communication strategy for each audience segment

4

WHERE WE'RE GOING

Establishing MBRF as a go-to resource on brain health and cognitive aging.

A campaign concept/theme with cohesive message communicated through various tactics and activations.

5

HOW WE'LL GET THERE

A three-year communication & distribution plan to:

- Place McKnight into the public eye through media engagements
- Educate the general public on aging cognitive health through creation of informative content
- Provide Primary Care Physicians with patient resources
- Keep patrons engaged through a bolstered communication strategy

Our Vision for MBRF

In this section, we share insight into our creative vision for this important and impactful initiative.

Your Mind Matters

It's where we do our thinking. Our problem-solving. Our remembering. The brain is the ultimate headquarters. And yet, as we grow older, many of us aren't tapping into its full capabilities.

At McKnight Brain Research Foundation, our mission is the mind. By championing aging research and cognitive health education, we're helping more adults unlock the power to preserve memory, stay independent, and savor life longer.

So, what will make this a great campaign?



The core values that will guide us.

Human

Engaging

Authentic

Educational

Approachable

Empowering

Warm/Caring

Trusted



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Your mind matters

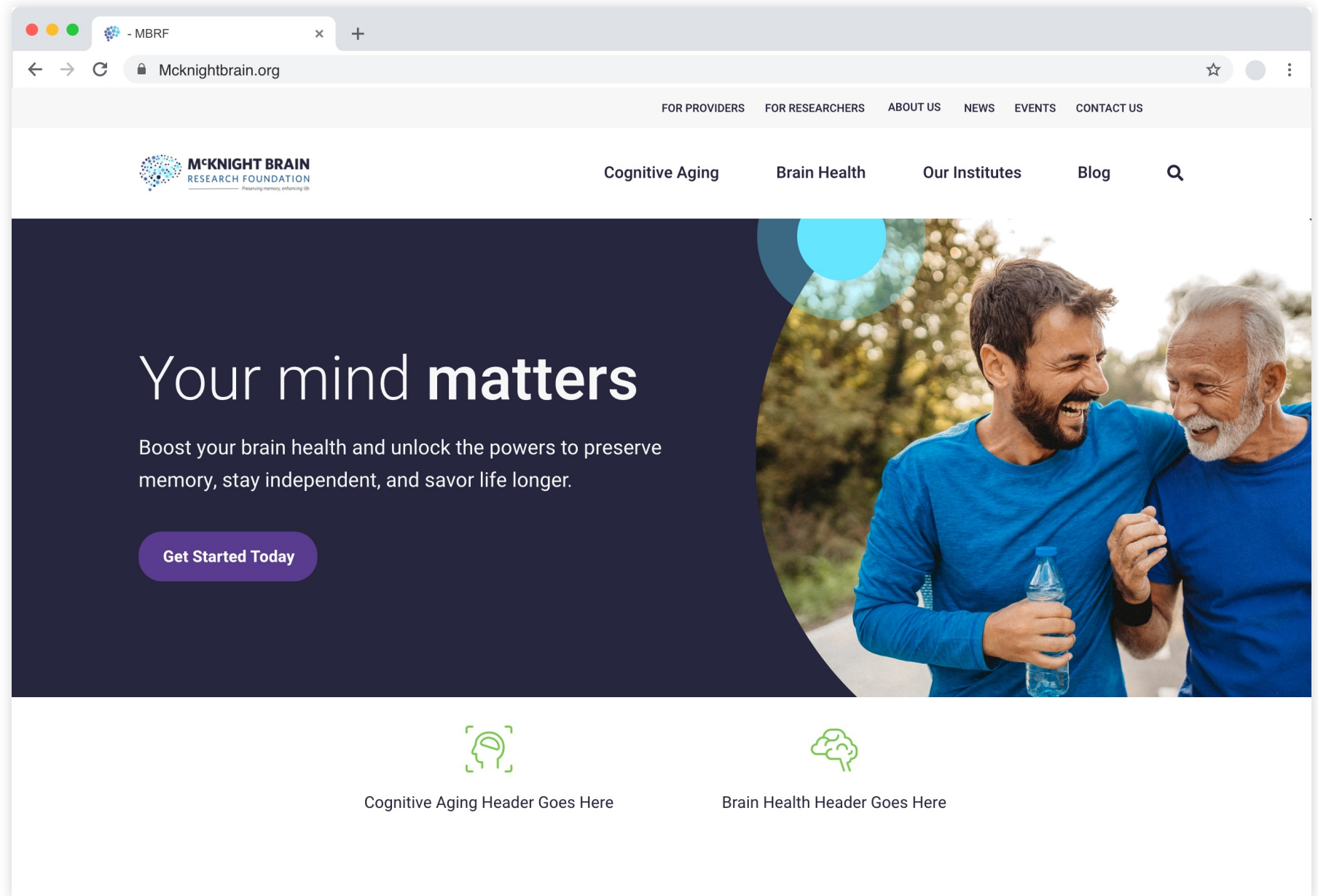
Maintain your brain health to savor life longer.

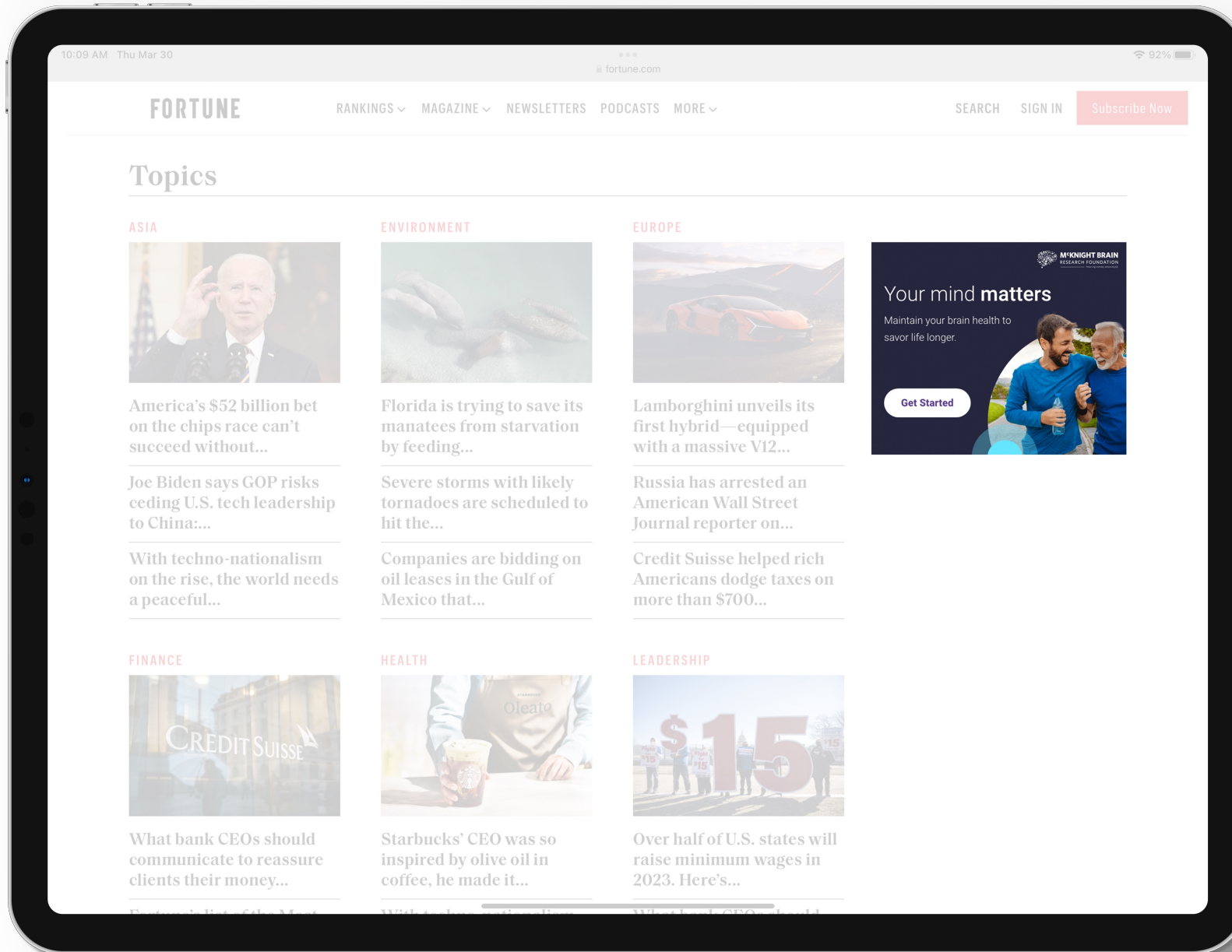
HOMEPAGE

Your homepage is the gateway for all audiences to engage and discover rich and relevant content.

Refreshing the homepage hero to be warmer and leveraging messaging from the campaign will drive engagement.

Also, a more streamlined, consumer-friendly navigation, will increase discoverability while still serving all audiences.





AD EXAMPLE

Targeted ads, such as display ads, with clear thoughtful messaging and strong calls to action play a critical role in driving consumers to the MBRF site.

Our Approach

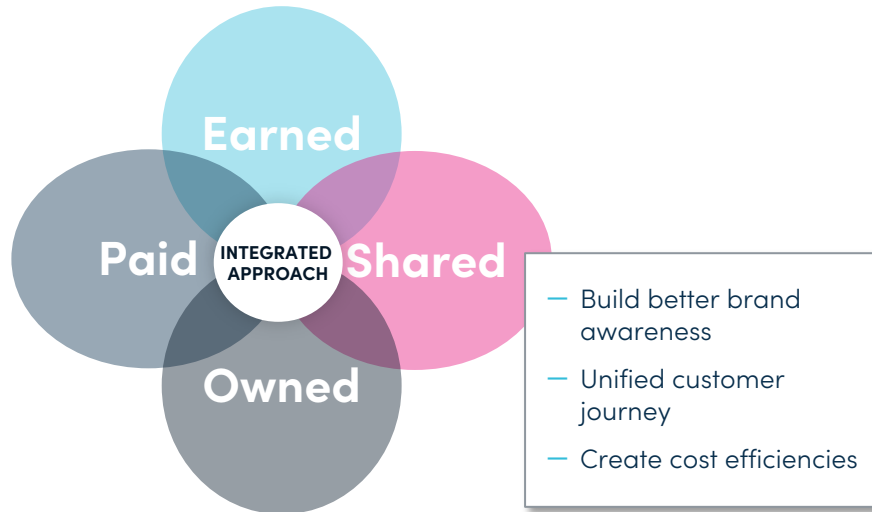
As we expand our journey together, its important to understand how we'll get there.
The success of this engagement will be dependent on the alignment and optimization
of ALL activities in support of a clearly defined strategy.

Approach Highlights

Here are a few highlights that characterize the way we'll achieve that with you:

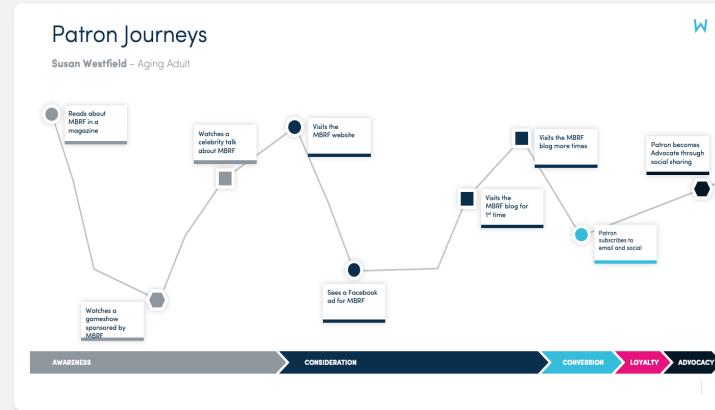
Integrated Programmatic View

At the heart of our approach is the creation of a purposeful and coordinated digital brand experience across all channels and media types. This enables us to consistently deliver more targeted and compelling content to all intended segments and in turn increase overall brand recognition and engagement for MBRF.



Consistency and continuity between and across all communication channels and media types will be the best approach to drive effective and efficient engagement.

Customized to your Desired Audiences

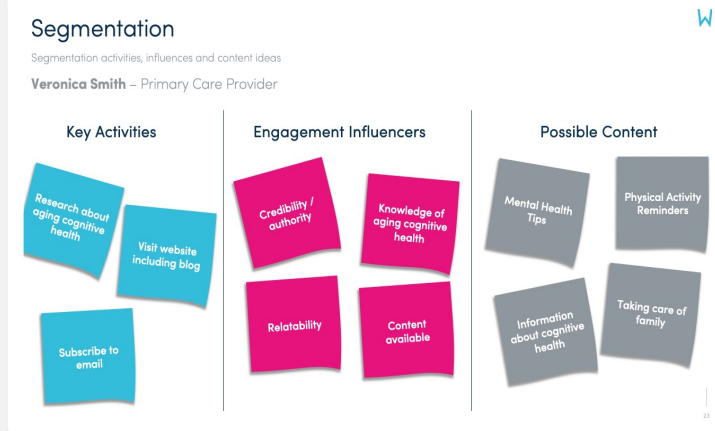


Above is an example of a persona journey map that we would anticipate reviewing and shaping as part of the engagement. **See Appendix** for full scale example(s).

The path to an effective multi-channel strategy that smartly supports meaningful conversations with your audiences starts with a detailed analysis of each audience type and how we foresee bringing them in to engagement with MBRF. We have created initial drafts for several of your persona types, customized to build brand awareness and engagement for each group. Reviewing and expanding those will be part of our initial Foundation work with you.

Adaptive and Data Driven

Given the nature of what MBRF wants to achieve, we know that the most effective Digital Marketing and Communications plan will, by necessity, need to evolve as we go. Our plan anticipates gathering and analyzing data on a frequent basis to inform strategic enhancements to the program. This will enable us to grow and respond to MBRF's audience and ensure resources are being applied smartly and efficiently to maximize impact and outcomes.



Above is an example of a segmentation planning workshop. **See Appendix** for full scale example.

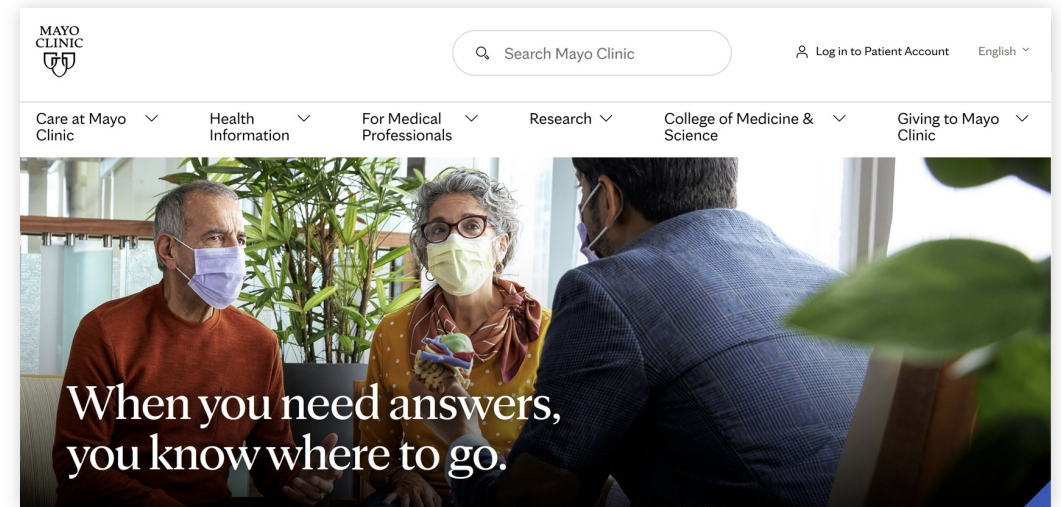
Expanding Website Content

Content will be critical to the success of this initiative. Whether on the website, social media platforms or other digital touchpoints – good, quality content is key to both establishing trust and expertise AND achieving and maintaining engagement. We plan to invest resources into helping you with this.

Today, the MBRF website is an informational site on the foundation with some educational resources. To achieve the goal of becoming a hub for information on cognitive aging and brain health, expanding the library of content available on the website is essential.

Consistently adding new, quality content to the website will:

- Give a reason for users to keep coming back to the website
- Keep visitors engaged on the website looking at the various material
- Help drive traffic from search as Google will consider those pages for search results
- Establish MBRF's reputation as a leading resource for cognitive aging



Mayo Clinic, a well-known health educational resource, is a good representation of a well known and trusted entity in the healthcare space. Their site has over 45,000 webpages, which serves to anchor their relevance and expertise in significant ways. To achieve the stated goals, MBRF will need to similarly create more quality content of its own.

Creating good content is
futile if no one sees it.

The 3-Year Plan: Core Program Components

Here are the key components of our proposed Program

Foundational Activities

A solid foundation sets you up for success. This covers necessary digital tools setup, such as web behavior tracking and social media management, as well as data insights for journey mapping, and brand lift study.

Website Updates & Improvements

Light refreshes to the website to keep visitors engaged. We want to make it fast and easy to find content especially as we expand the library of content.

Email Updates & Improvements

Reviewing and updating the email program to be a world-class offering which includes automated sends and one-off emails.

Planning & Management

Overseeing and orchestrating the roadmap to ensure deliverables are on time and resources are efficiently used.

Public Relations

Expanding the reach of MBRF through interactions with TV, podcasts, radio, and other influential channels.

Media & Content Services

Development of content and media assets to optimize for quality traffic that go to the website where they will find a rich assortment of material to engage.

Media Spend

Working media dollars spent directly on paid marketing channels to amplify MBRF's reach

Flex (Reserve)

Funds held in reserve to be used as needed. As new opportunities arise due to market trends or data insights, these funds allows us to pivot with ease.

Our Capabilities

Strategic Consulting

Digital Marketing

Website Design

Web Development

User Research & UX

Search Engine Optimization

Paid Media

Public Relations

Data Strategy and Analysis

Content Strategy + Creation

The 3-Year Plan: Example Tactics

Whereoware has a deep toolbox of tactics planned for this engagement. When and how we leverage them will depend on the objective, budget, timing, and audience. Below are a few highlights of what we have in mind. We've provided even more tactics for you in the **Appendix**



Website Content / Social Media / Email

Description: Add content on the website, email, and social media to engage loyal audiences

Impact: Owning your reach through your communication channels



Bloggers, Influencers, and Celebrity Ambassadors

Description: Leverage those with a following and expertise to create validation with new audiences

Impact: Increased Brand Awareness



Sponsored/Branded Content

Description: Partner with editorial publications such as Hearst (Prevention, Men's Health, etc.) to create content on their owned magazines and websites

Impact: Increased Brand Awareness



Paid Video

Description: Serve video ads on platforms such as YouTube, Hulu, Disney, and others

Effect: Increased Brand Awareness & Website Traffic



Public Relations Efforts

Description: Execute a PR strategy that includes press releases, national (and local) news coverage, and more

Effect: Increased Brand Awareness



Paid Search

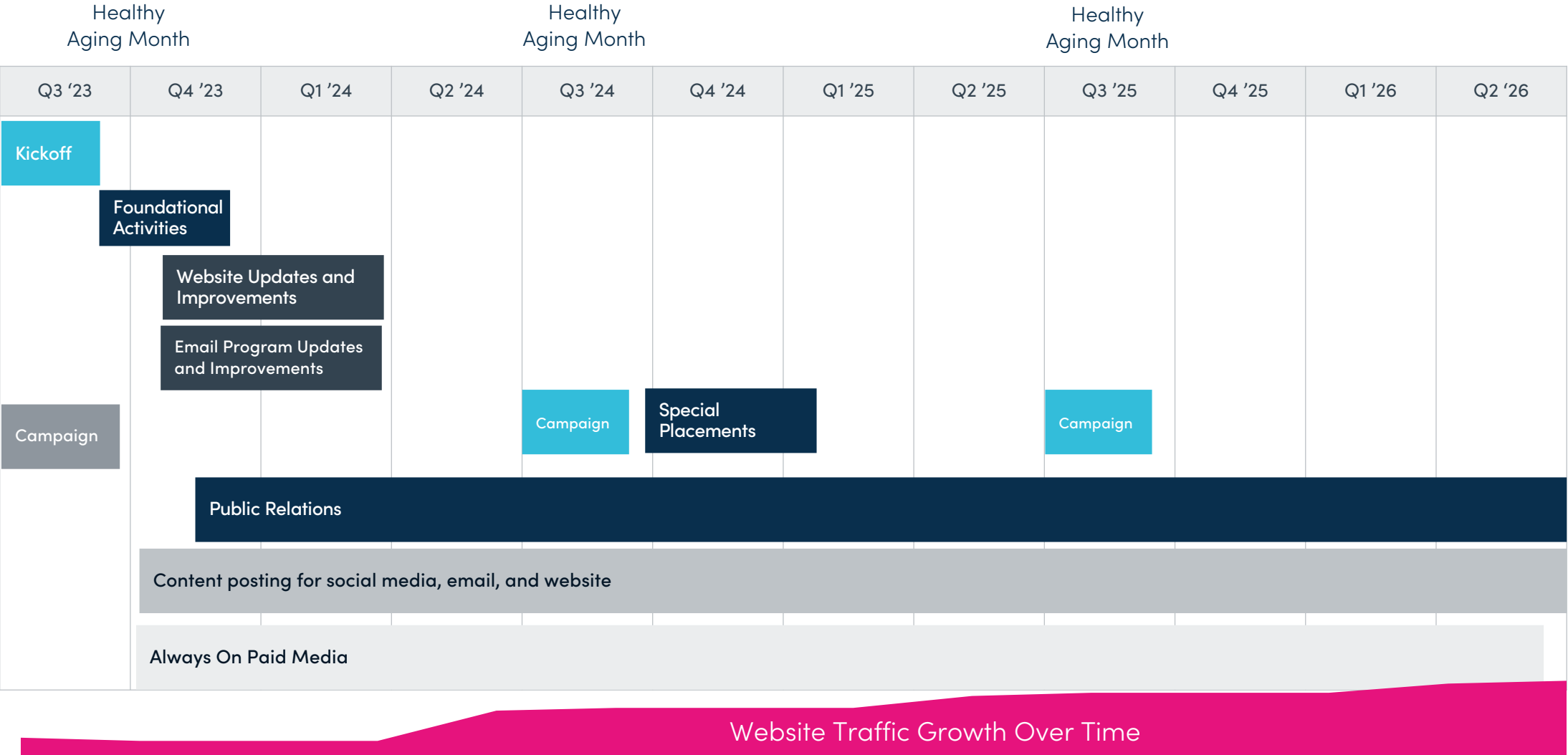
Description: Use text ads to appear on search engine results pages (i.e. Google) for targeted search terms

Effect: Increased Brand Awareness & Website Traffic

Initial Roadmap



All the great elements we outlined above are presented here in a timeline format. Every year, we'll dedicate some spend towards **Healthy Aging Month**. The rest of the year, we'll be focused on sustaining the consumer engagement through special media buys (especially year 2) and by having some media always on. The result is continued website traffic growth, aka more and more people seeing content and engaging with MBRF.



The 3-Year Plan: Build, Enhance, Accelerate

Experience dictates a disciplined approach will yield the biggest impact. In this case, we'll take a graduated approach, where each year's focus will be purposefully defined to continually ratchet us up – building on the achievements of the prior year – fueling expansive growth toward our ultimate goals.

YEAR 1

Construct the Foundation

Wherever we converse with people, we want them to be informed, engaged, and participative.

Measurements of success: Performance of owned channels such as social media engagement, email metrics, and website performance.

YEAR 2

Amplify the Brand Voice

This is the year we will take big steps forward towards engaging with the public. Think partnerships, media buys, and more.

Measurements of success: The lift in brand awareness (how many people are aware of McKnight), number of visits to the website, number of email subscribers, and how many followers on social.

YEAR 3

Engage with the Community

Building upon the success of the previous year's efforts, we will engage in organic conversations for and about MBRF happening outside of owned channels.

Measurement of success: The lift in brand awareness, top-of-mind awareness, and reach of McKnight on non-owned communication channels (magazines, social media, etc.).

Investment

This next section covers how we envision applying your investment smartly over the course of the three-year program.

Entire Investment: Overview

The estimated costs provided in this section are based on our current understanding of MBRF's goals and requirements along with Whereoware's experience with projects of similar size and scope.

- Estimate below reflects the total investment over a 3-year term.
- Actual monthly and/or annual costs may vary.
- Whereoware's professional services are based upon a blended rate of \$185/hour.
- Media spend costs are the direct responsibility of MBRF and actual media spend may vary based on campaign type and reporting metrics.

"Low" Budget

ITEM	INVESTMENT
Foundational Activities	\$35,980
Website Updates & Improvements	\$25,900
Email Updates & Improvements	\$12,950
Media & Content Services	\$324,120
Public Relations	\$150,000
Media Spend	\$289,000
Planning & Management	\$121,379
Flex (Reserve)	\$40,000
Estimated Total	\$999,329

"Mid" Budget

ITEM	INVESTMENT
Foundational Activities	\$40,605
Website Updates & Improvements	\$44,400
Email Updates & Improvements	\$12,950
Media & Content Services	\$345,210
Public Relations	\$150,000
Media Spend	\$725,000
Planning & Management	\$134,643
Flex (Reserve)	\$47,000
Estimated Total	\$1,499,808

"High" Budget

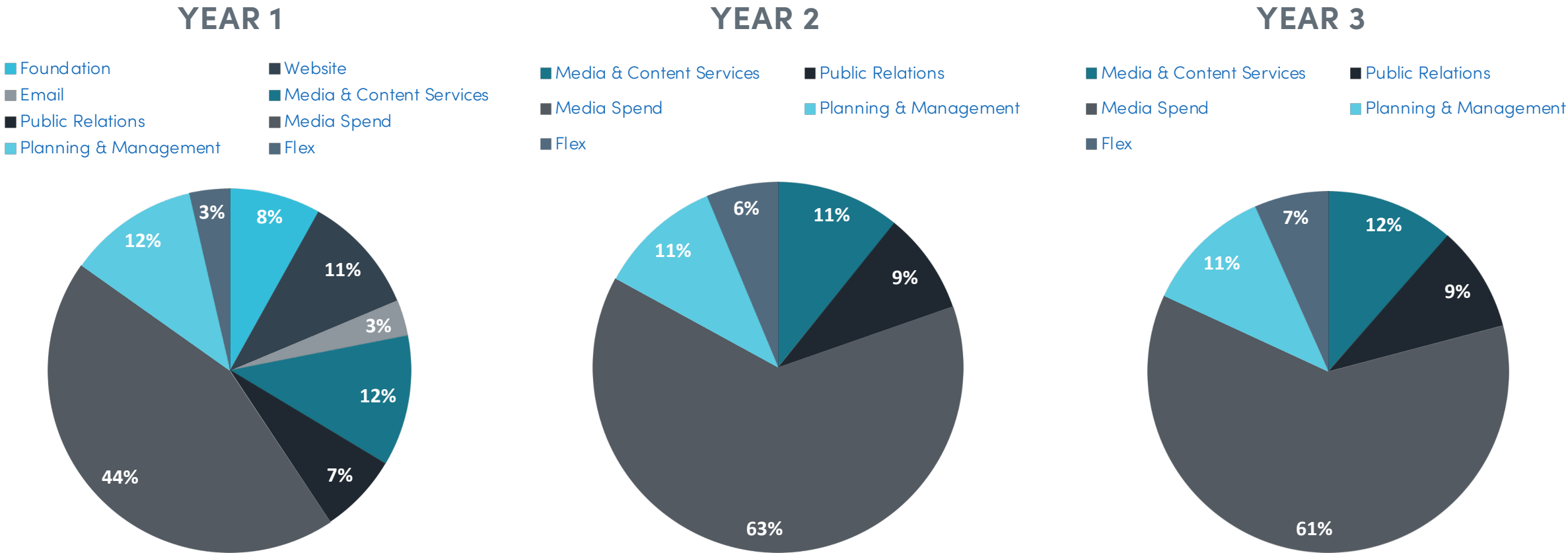
ITEM	INVESTMENT
Foundational Activities	\$45,230
Website Updates & Improvements	\$59,200
Email Updates & Improvements	\$18,500
Media & Content Services	\$442,890
Public Relations	\$150,000
Media Spend	\$1,000,000
Planning & Management	\$200,013
Flex (Reserve)	\$84,000
Estimated Total	\$1,999,833

To effectively achieve MBRF's goals we recommend leveraging the \$2M budget. This will enable greater reach and flexibility across the various channels **accelerating the opportunities for engagement.**

Entire Investment: Investment Allocations



We understand the importance of each dollar needing to make an impact. Allocating the \$2 Million budget is central to staying on track and having a great plan.



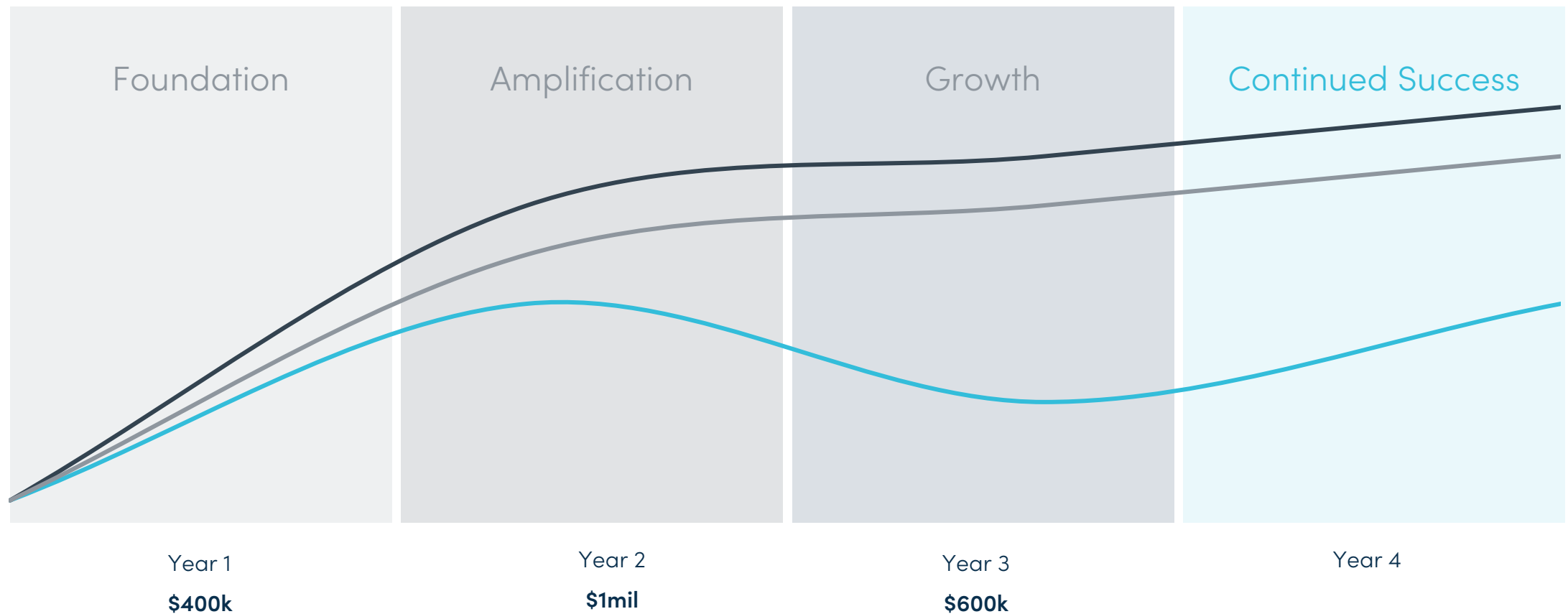
NOTE: These percentage allocations assume a maximum budget amount for each year. Should the final approved budget be less, we can adapt and adjust these percentages if necessary.

Entire Investment: Trend Results of Recommended Approach

So, how would we split up the investment year over year? This is our recommendation with a **\$2 million budget**. What we would like to convey is that over time your investment becomes more and more efficient because even without paid efforts, people are engaging with your content through your own channels and other communication channels.

Spend vs. Results

— Spend — Brand Mentions — Website Visits

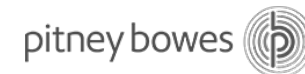


Whereoware Overview

Digital experience agency
driving smart growth through
digital strategy and activation.

Select Clients

Our team brings a depth and breadth of experience working with a wide cross-section of clients across a variety of industries. Here are just a few of the clients we are proud to partner with.



Team



These are the people that will work with you frequently. Some may seem like familiar faces because they are! We know how much you loved working with them. New and old Whereoware friends, alike, look forward to collaborating with you on this journey to educating the public and primary care physicians on aging cognitive health.



BRANDI JOHNSON

Client Partner



UZAIR HASAN

Sr. Digital Strategist



RACHEL MEYER

Assoc. Director, Media



RAQUEL PLOETZ

VP, Strategic Solutions

Key Takeaways for Success

Brand Positioning

Alignment on brand positioning allows us to communicate strategically, with confidence, and with impact. While McKnight does not have any “competitors” per se, the foundation is competing for eyeballs and time. We need to create a reason why someone should take the time to engage with content from McKnight instead of spending that time doing anything else. This is known as answering the WHY.

Audiences

Defining audiences contributes to the success of the plan because the knowledge of each audience segment varies. With limited funds, we must be smart on which communication channels we engage on. Prioritization for media activations will be aging adults, consumers, and caretakers.

Content

The most important deliverable is content. This is a joint effort from McKnight and Whereoware. MBRF serves as an advisor to content strategy – e.g., relevant topics, important information to share. Whereoware’s role is content strategy and production.

Technology

Allowance to add technological needs within the allocated budget to allow us to retrieve the necessary data and improve workflow efficiency

Timelines

Ability to execute with set deadlines is dependent on an efficient approval process for any initiative. Timely feedback from key stakeholders is critical to success.

Budget

The budget will continue to change and evolve over time. Based on data findings, we will continue to optimize the communication plan. This ensures we spend the money smartly and meet the goals we set.

Closing Thoughts

From the brand initiatives to website refresh, we have done great work together. The next phase of growth for the foundation will be another big step forward. We are excited to tap into our expertise within creative, strategy, communication, tech, and media to support you on this next chapter.

Thank you for taking the time to review our proposal. This brings us to the conclusion of our big ideas. There are more details on our communication plan found in the appendix.

We look forward to hearing back from you on how we can continue to [put our minds together](#) to achieve small and big wins alike.

- Your partners at Whereoware

Thank You!

We look forward to collaborating Please reach out if you have any questions.

PRESENTED BY

Brandi Johnson

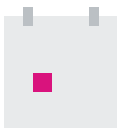
Client Partner

bjohnson@whereoware.com

Appendix

APPENDIX A: Approach Details

Approach Overview



Content Planning

Understanding your audience is the start to effectively communicating with your audience

- Content Categories** – identify opportunities within your categories to potential key points in time, events.
- The Who, What, When, Where, and How** – of the content operation to ensure you can execute on the content strategy efficiently.
- Persona Journey** – We have created initial drafts for several of the different groups of people engaging with the content and MBRF. This work will be expanded upon.



KPI's/Measurement

Gather and analyze data on a frequent basis to inform strategic enhancements to the program. This will enable us to grow and respond to your audience and ensure effective resource management.

- Awareness** – can be the number of times someone has seen something mentioning MBRF, video views, number of brand mentions
- Consideration** – website metrics such as number of users, time spent on website, number of pages viewed
- Post-Engagement** – number of email subscribers, conversations occurring outside of owned channels



Channel Mix

At the heart of our approach is the creation of a purposeful and coordinated digital and offline experience across all channels and media types

- Owned** – Channels you control such as email, website, and your own social media channels. This is the priority for year one.
- Paid** – Channels and tactics from which you can purchase advertising space from such as YouTube, Spotify, Facebook, and Google. This is the priority for year two.
- Earned** – Brand mentions outside of your owned channels such as press mentions, other social media accounts, and news publications. This is a mixture of paid and non-paid efforts. This is the priority for year three.

01 Increase public awareness

- Impressions – number of times someone has seen a piece of content that includes MBRF
- Reach – number of unique people that has seen a piece of content that includes MBRF
- Brand Lift – survey customers prior, during, and after communications plan on brand familiarity, awareness, and top of mind

02 Engagement with content

- To measure the success of this goal, we will look at:
- Number of unique visitors and sessions (total visits) to the website including specific pages such as blog
 - Social media metrics such as engagement rate (number of people who engage with a post divided by number of people who saw the post), reach, and page likes
 - Number of reads for each blog content and downloads of available digital material

03 More traffic to owned channels

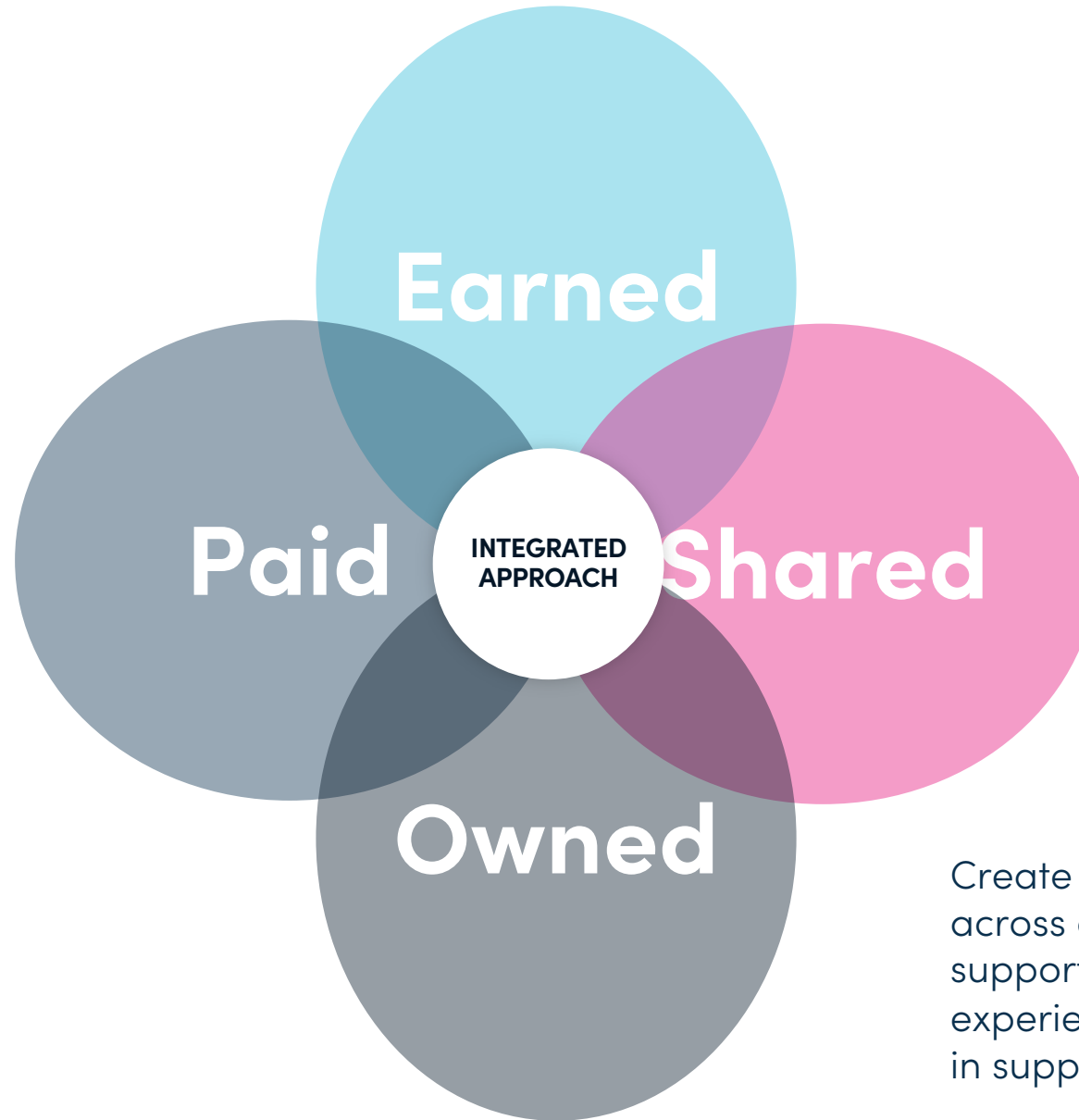
- To measure the success of this goal, we will look at:
- Email metrics such as number of subscribers, open rate (how many subscribers open the email), and click rate (how many subscribers clicked a link)
 - The growth in the number of people search for branded terms on Google such as “McKnight” or “MBRF”
 - Paid media metrics such as spend and clicks

04 Reach of the brand

- To measure the success of this goal, we will look at:
- Impressions on press releases, editorial content, and similar mediums
 - Different types of audiences reached across all the various media channels used
 - Growth in various audience cohorts and segments

Integrated Approach

- Build better brand awareness
- Unified customer journey
- Cost efficiencies



Create consistency and coordination across channels and media types to support an optimal digital brand experience and customer engagement in support of all intended segments.

Segmentation (example)

Segmentation activities, influences and content ideas

Veronica Smith – Primary Care Provider

Key Activities

Research about
aging cognitive
health

Visit website
including blog

Subscribe to
email

Engagement Influencers

Credibility /
authority

Knowledge of
aging cognitive
health

Relatability

Content
available

Possible Content

Mental Health
Tips

Physical Activity
Reminders

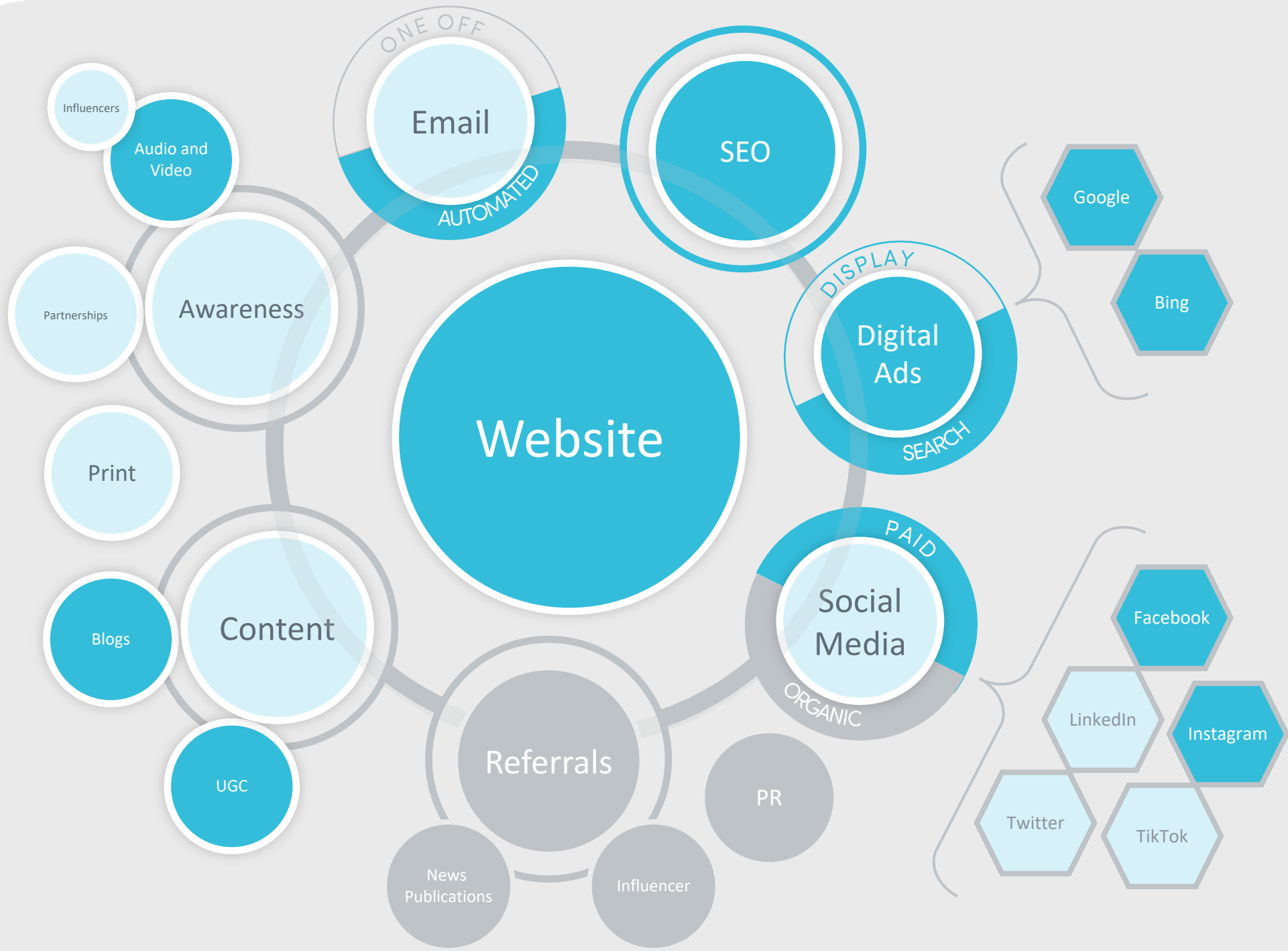
Information
about cognitive
health

Taking care of
family

MBRF Future Ecosystem



Personalized to
support all Segments



APPENDIX B: Action Plan Details

The Right Strategies to Reach the Right Audience

Each of our identified audiences has a fairly unique profile in terms of motivation and digital habits. Our approach will customize outreach accordingly to maximize relevance and impact, rather than appeal to the lowest common denominator.

40+ Years Aging [Core Audience]

Mindset

This patron is naturally aging and has no serious brain health issues. This is the core audience because they will benefit the most from the content MBRF produces.

Digital Savvy: Low-Medium

This segment does use social media and some technology. Overall considered tech novice with limited knowledge and experience. You will find them active on platforms such as Facebook.

Approach Characteristics

Communicating to this person is best done through a mixture of digital and offline channels such as

- Email
- Paper mail
- Facebook
- Television

Consumer [20-40 Yrs. Self-Conscious]

Mindset

This patron is looking to protect their brain health early. They likely also have aging adults who are active in their lives such as grandparents

Digital Savvy: High

This segment actively uses their phones and various digital devices. They use digital channels to communicate and gain information especially social media. You will find them active on platforms such as TikTok, YouTube, and Instagram.

Approach Characteristics

Communicating to this person is best done through digital channels such as

- Social Media
- Digital Audio
- Online Video

Caregivers

Mindset

This patron is likely between the ages of 32-45. They have an aging parent who is under their care as well as children.

Digital Savvy: Medium

This segment is fairly familiar with technology. They may lean on their kids to assist with technology needs at times. This cohort is active on social media platforms such as Facebook and Instagram.

Approach Characteristics

Communicating to this person is best done through digital channels such as

- Digital Publications
- Facebook and Instagram
- Google Ads
- Email

Primary Care Physicians

Mindset

This patron is the primary doctor for aging adults. They are concerned about the health and wellbeing of their patients including their brain health.

Digital Savvy: Medium

This segment can navigate the basics of technology. At times, they may fight technology especially when it comes to their workplace. This cohort is active on social media platforms such as LinkedIn and Facebook.

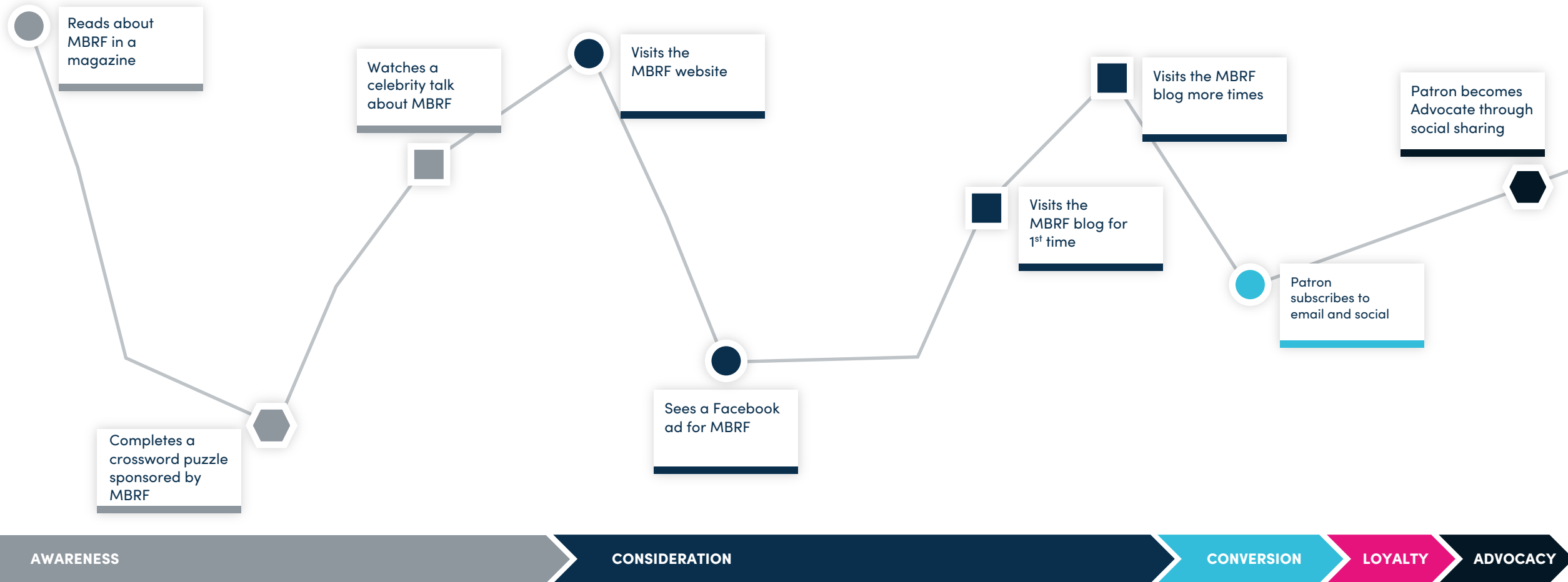
Approach Characteristics

Communicating to this person is best done through activations such as

- Providing educational material that they can share with patients
- Display advertising
- Credible endorsements

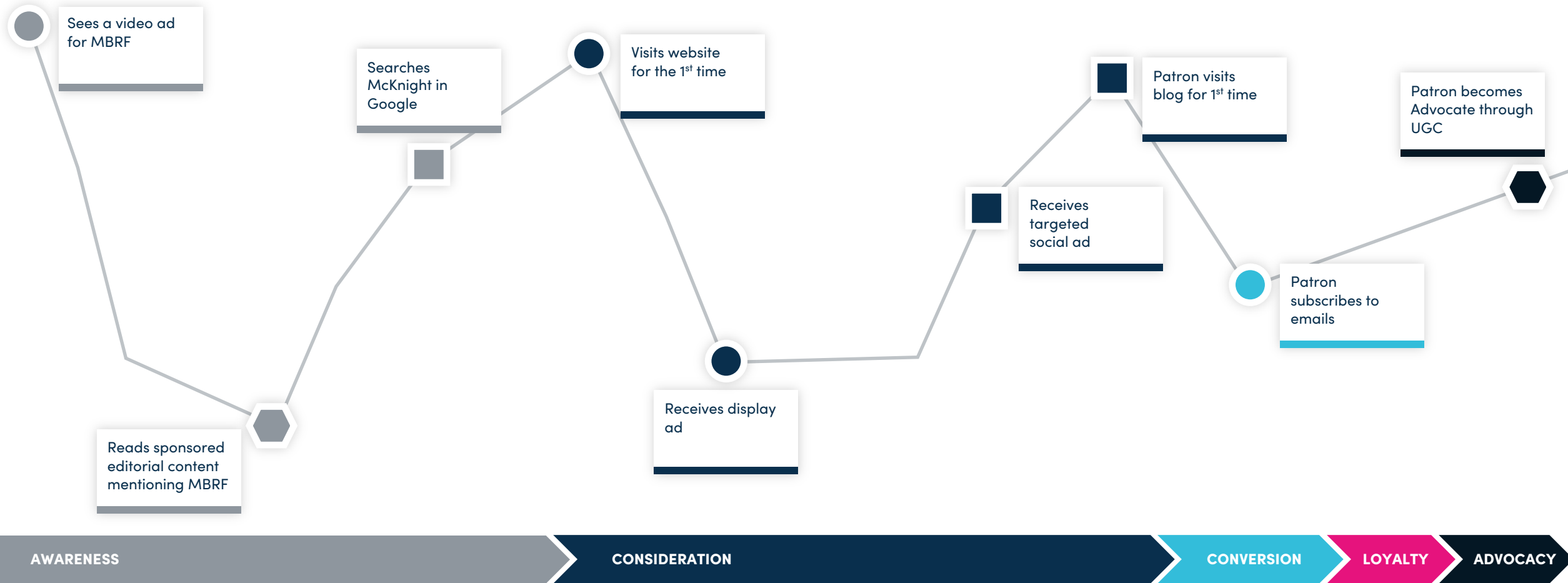
Patron Journeys

Susan Westfield – Aging Adult



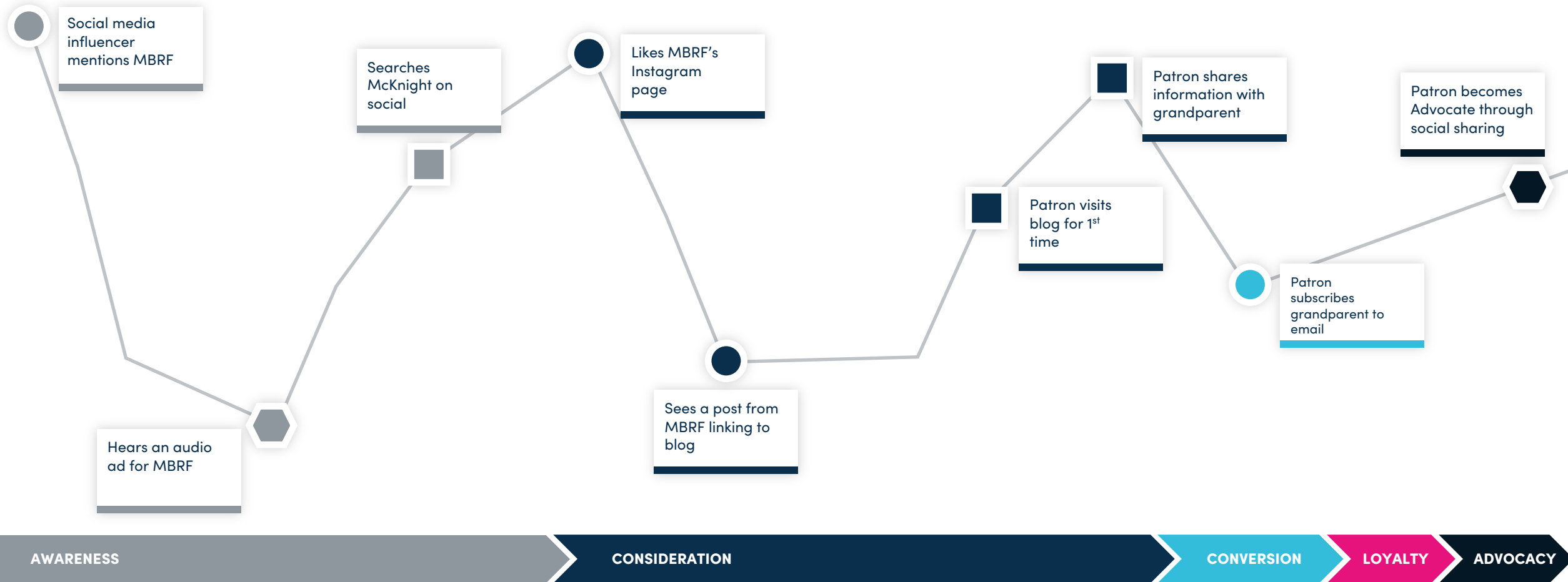
Patron Journeys

Lexis Smith – Primary Care Provider



Patron Journeys

Asher Rhys – Supporting Family Member / Consumer



Increase Public Awareness

The tactics and tools we would leverage throughout the Program

Consumer Research and Studies

Description:

- Brand lift study (are more people aware?)
- Persona and journey mapping

Effect: Measure how successfully the marketing plan is reaching targeted audience

Bloggers and Influencers

Description: Leverage content creators with a following and expertise to reach new audiences and create content for MBRF

Effect: Increased Brand Awareness

Sponsored/Branded Content

Description: Partner with editorial publications such as Hearst to create content on their owned magazines and websites

Effect: Increased Brand Awareness

Partnerships

Description:

- Corporate partnerships (e.g., WHO)
- Brand partnerships (e.g., Headspace)

Effect: Increased Brand Awareness

Celebrity Ambassadors

Description: Work with a celebrity figure to endorse the foundation

Effect: Increased Brand Awareness

Display Advertising

Description: Serve banner ads to targeted audiences across the internet

Effect: Increased Brand Awareness & Website Traffic

Increase Public Awareness

The tactics and tools we would leverage throughout the Program

Promotions and Contests

Description: Host contests with prizes to encourage audience engagement

Effect: Increased Brand Awareness

Paid Audio

Description: Reach customers on audio channels such as Spotify, podcasts, iHeart, and Pandora

Effect: Increased Brand Awareness

Traditional Media

Description: Advertise to 45+ age group through direct mailer and paper ads

Effect: Increased Brand Awareness

Sponsorships

Description: Sponsor TV gameshows and crossword puzzles

Effect: Increased Brand Awareness

Paid Video

Description: Serve video ads on platforms such as YouTube, Hulu, Disney, and others

Effect: Increased Brand Awareness & Website Traffic

Public Relations

Description: MBRF spokesperson interview on Good Morning America

Effect: Increased Brand Awareness & Website Traffic

Drive Traffic to Website



The tactics and tools we would leverage throughout the Program

GA4 Setup and Reporting

Description: Set up Google Analytics that measures site visits, see which channels customers come from, and other website data

Effect: Website Measurement

Paid Search

Use text ads to appear on search engine results pages for targeted search terms

Effect: Increased Brand Awareness & Website Traffic

Native Ads

Description: High-impact visual ads that fit seamlessly into a partner's platform

Effect: Increased Brand Awareness

Paid Social

Description: Serve ads across Social Network Channels such as Facebook, Instagram, LinkedIn, etc.

Effect: Increased Brand Awareness & Website Traffic

News Sources (backlinks)

Description: Increase referral traffic from authoritative resources such as news networks and universities.

Effect: Increased Brand Awareness

SEO Efforts

Description: Improve traffic originated from organic search (Google)

Effect: Increased Brand Awareness & Website Traffic

Owning Your Reach



The tactics and tools we would leverage throughout the Program

Organic Video

Description: Post content on video platforms such as YouTube and TikTok

Effect: Increased Brand Awareness and Engagement

Organic Social Media

Description: Post content on Facebook and Twitter to engage and educate patrons

Effect: Increase Brand Awareness and Engagement

Blog / Website Content

Description: Add content on the website and blog to provide educational information to visitors

Effect: Engagement

Email

Description: Utilize email as a communication channel to continue engagement with patrons

Effect: Engagement