



**Morgan Brock**  
Advisory Group

## Marketing & Sales Revamp Proposal

for **JMJ Manufacturing**

*As requested by*  
**Alessandro Rossi**

Joe Ardeeser  
President & CEO  
Morgan Brock Advisory Group

[joe@rocketconsultingforyou.com](mailto:joe@rocketconsultingforyou.com)  
[425-268-2718](tel:425-268-2718)  
[rocketconsultingforyou.com](http://rocketconsultingforyou.com)

# Scope of Work

## Marketing Revamp

### Target Market Analysis

\$4,750

Identify and describe the ideal customer for the company's products or services, as well as key competitors in the market.

Work included:

- Conduct a market segmentation analysis to identify customer groups based on demographics, psychographics, and buying behaviors.
- Develop customer personas to describe the key characteristics and pain points of each customer segment.
- Conduct a competitive analysis to identify the company's main competitors, their strengths and weaknesses, and their marketing and sales tactics.

Limitations: The analysis will focus on a single geographic market or region. Additional fees may apply for additional markets or regions.

#### Modifications

Customer Survey — \$1,250

Conduct a survey of customers to gather feedback and insights on their needs and preferences. Additional fees may apply for survey design and analysis.

Base Cost: \$3,500

### Marketing Plan

\$12,500

Develop a comprehensive plan for promoting the company's products or services through various marketing channels and tactics.

Work Included:

- Conduct a marketing audit to assess the effectiveness of the company's current marketing activities and identify areas for improvement.
- Develop a marketing strategy that outlines the target audience, messaging, creative elements, and budget for each marketing campaign.
- Create a marketing calendar that outlines the timing and frequency of each campaign.
- Implement and manage the marketing campaigns, including ad creation and placement, email marketing, social media, and other channels as needed.
- Provide regular reporting and analysis of campaign performance, with recommendations for optimization.

**Limitations:** The marketing plan will focus on a single geographic market or region. Additional fees may apply for additional markets or regions.

#### Modifications

Content Marketing — \$1,250

Develop a content marketing strategy

Influencer Marketing — \$2,250

Identify and partner with social media influencers or brand ambassadors to promote the company's products or services. Additional fees may apply for influencer outreach and management.

Brand Positioning

\$3,500

Develop a brand positioning strategy to differentiate the company's products or services from competitors. Additional fees may apply for brand research and strategy development.

## Sales & Retention

### Sales Strategy

\$14,000

Develop a plan for improving the company's sales performance, including tactics for generating leads, qualifying prospects, and closing deals.

Work Included:

- Conduct a sales audit to assess the effectiveness of the company's current sales process and identify areas for improvement.
- Develop a sales strategy that outlines the target audience, sales messaging, and tactics for generating leads and closing deals.
- Develop a lead generation plan that includes outbound and inbound marketing tactics such as cold outreach, email marketing, and social media.
- Develop a lead qualification process that includes criteria for identifying high-quality leads and strategies for nurturing them into customers.
- Develop a sales process that includes a clear set of steps for engaging with prospects, presenting solutions, and closing deals.
- Provide sales training and coaching to sales representatives to help them execute the sales strategy effectively.
- Provide regular reporting and analysis of sales performance, with recommendations for optimization.

#### Modifications

Sales Team Optimization — \$1,500

Provide coaching and training to sales representatives to help them optimize their sales performance and achieve their targets. Additional fees may apply for training and coaching services.

Base Cost: \$12,500

---

### 1-Page Cheat Sheet

Included

Simple 1-page cheat sheet that summarizes the sales strategy

---

Sales Pipeline Management

\$4,750

Implement a sales pipeline management system to track the progress of leads through the sales process and identify areas for improvement. Additional fees may apply for software implementation and training.

---

Customer Retention Strategy

\$8,750

Develop a plan for keeping customers engaged and loyal to the company's products or services.

Work Included:

- Conduct a customer satisfaction survey to gather feedback and insights on the company's products or services.

- Develop a customer segmentation analysis to identify customer groups based on demographics, psychographics, and buying behaviors.
- Develop a customer loyalty program that incentivizes repeat purchases and referrals.
- Develop a customer service strategy that includes response times, issue resolution protocols, and proactive communication.
- Develop a customer communication plan that includes regular email newsletters, social media updates, and other forms of engagement.
- Provide regular reporting and analysis of customer engagement and satisfaction metrics, with recommendations for optimization.

**Modifications**

- Customer Experience Design – \$1,500  
Develop a customer experience strategy that aligns with the company's brand values and differentiates it from competitors. .

Customer Cancellation Research Cost TBD

**Discount**

New Customer Discount -10% -\$4,475

**Additional Items for Consideration**

Performance Metrics & Monitoring \$525/Month

Establish key performance indicators (KPIs) and monitoring systems to track the effectiveness of implemented process improvements and ensure continuous optimization.

Parameters:

- Initial work not to exceed 30 hours
- Generally, we create about 3-5 dashboards on the initial setup
- 4 hours/month included for continuous KPI discovery and creating additional dashboards
- Access is user-based - the base setup comes with 5 seats

**Modifications**

- Additional Users for Dashboard System – \$25 × 1 \$25/Month

Base Cost: \$500/Month

Pre-Purchased Monthly Hours (\$120/hour) \$120 × 10 \$1,200/Month

Pre-purchased hours can be used for any task on your project.

Monthly retainer discount of 20%. Minimum of 5 hours per month with a 6-month commitment.

Rush Fee +15% \$6,713

Please choose this option if you'd like us to prioritize your project so that it can be completed 30 days sooner.

12-Month Installment Plan

+12% \$5,370

Please choose this option if you'd like 12 equal monthly payments for the one time costs associated with this project.

Payments are due on the first of each month.

**One Time Total: \$52,357.5**

**Payment Amount (each month): \$4,363.13\***

\* This amount will change if your selections on this proposal change.

### One Time

### Recurring Monthly

---

**Total(s) \$52,358**

---

**Total(s) \$1,725**

# About Us

For more than 10 years Morgan Brock has been providing quality consulting. Our process is truly time-tested as we've worked with over 500 clients over the years.



## Our Team



**Jason Duran**  
*CEO / Chief Story Teller*

Jason has been our leader since MB was founded 10 years ago. Jason's experience with web and marketing has helped 100s of our clients succeed in building their business and finding new customers.



**Gina Riswald**  
*Sales Manager*

Gina has a passion for customers and finding solutions that work. When's she not hard at work at MB, she can be found camping and spending time with her husband, 2 children and their pet dogs.



**Maria Thomson**

*Creative Director*

Maria brings over 20 years of consulting and accounting experience expertise. She's a constant tinkerer and loves building on our well-established process.

Maria loves traveling and spending time with her husband Mike.

# Terms

## 1. Confidentiality

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

## 2. Termination of Agreement

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.

Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

## 3. Limitation of Liability

Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

## 4. Intellectual Property

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

## 5. Dispute Resolution

If either party accuses the other of being in breach of contract, the accused party will have 30 days to address the breach.

## 6. Applicable Law

This Agreement shall be governed by and construed in accordance with the laws of New York State.



Both parties agree to the terms and conditions outlined above.

COMPANY	CLIENT/CUSTOMER
_____ Signature	_____ Signature
_____ Title	_____ Title
_____ Date	_____ Date