



# Hubspot Marketing Automation: Audit, Optimization, Content Creation, and Execution Plan

## Request for Proposal Number 08052019

(Responses are due Wednesday, August 21, 2019 at Noon, Eastern Daylight Savings Time)

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### Important Dates

Date	Item
Monday, August 5, 2019	RFP is posted to the <i>Michigan Virtual</i> website.
Monday, August 12, 2019	Vendor questions are submitted by email only to <i>Michigan Virtual</i> .
Wednesday, August 14, 2019	<i>Michigan Virtual</i> responses to Vendor questions are posted on michiganvirtual.org along with the original RFP.
Wednesday, August 21, 2019	Written Proposals due to <i>Michigan Virtual</i> .
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## I. INTRODUCTION

Michigan Virtual is seeking a Hubspot certified partner agency services to build and help implement a more robust, sophisticated, integrated, creative demand/lead generation campaign that hits on all the elements required in an efficient manner and an accelerated time frame that doesn't constrain our internal resources, but leverages them where appropriate. Michigan Virtual implemented Hubspot Enterprise Level Growth Stack two years ago. Consequently, *only Diamond, Platinum, and Gold Hubspot Certified agency partners may respond to the RFP*. In addition to those items, other factors will be considered including the Vendor's customer references, as well as expertise.

This work also needs to be performed effectively over a short time frame, such that to the extent possible the majority of it is complete by September 30, 2019.

By releasing this RFP, *Michigan Virtual* makes no guarantee of any awards of work to any respondents now or in the future.

## II. BACKGROUND OF MICHIGAN VIRTUAL

*Michigan Virtual* is a 501(c)(3) organization located in Lansing, Michigan, and was established by the State of Michigan in 1998 to expand the use of learning technologies with a focus of service on Michigan's K-12 community with quality online instructional services.

Today, *Michigan Virtual* offers online courses to students and professional development services to educators. Annual revenues are between \$12 million and \$14 million. *Michigan Virtual* is funded through state and federal grants as well as tuition revenue. Annual expenses are approximately \$14 million with a September 30<sup>th</sup> fiscal year end. *Michigan Virtual* employs over 200 people in one location.

Additional information is available on our website [michiganvirtual.org](http://michiganvirtual.org).

### Our customers

Our customers are school districts, teachers, parents and students.

- **Administrators** in schools, both public and private, are our primary target audience. They make decisions about Vendor selection for online courses for students and professional development for educators.
- **Parents** and **students** are a secondary audience target. Parents can request that their student take online courses through their preferred Vendor. Students are often influenced by their peers regarding courses and Vendors.
- **Educators** can also choose individual professional development through their preferred Vendor.

Specifically, we target, market and sell to K-12 schools in Michigan, including public, private, and charter schools and also to parents who homeschool their children. Our main buyer personas are as follows:

1. **School Administrators** - including Superintendents, Principals, Curriculum Directors, and Professional Development coordinators. Administrators must deliver personalized education to both their students and educators based on a number of factors. Administrators face several buyer challenges:
  - A. To deliver quality, personalized course work to both students and educators
  - B. To hold steady or increase the graduation rates of students
  - C. To align educator professional development to district and school improvement plans
  - D. To stay within limited school budgets.
  
2. **Educators** - including teachers in the classroom, administrators, and support staff. Educators are responsible for keeping their certifications current by taking coursework that awards State Continuing Education Clock Hours (SCECHs). There are also several courses that are required on a yearly basis to comply with state law (compliance courses). Educators face these buyer challenges:
  - A. To find relevant courses and ones that offer workable timeframes
  - B. To find courses that fit within their budget.
  
3. **Parents** - including parents of homeschooled students and parents of students who wish to take courses in the summer. Parent experience these buyer challenges:
  - A. To find appropriate courses their local school will accept credit for (non-homeschool).
  - B. To find courses that will fit into their budget (both homeschool and non-homeschool)
  - C. To find courses that meet their students' academic needs and ones that offer workable timeframes (especially homeschool and non-homeschool).

#### **Our primary competitors for student courses**

- Edgenuity
- K12
- A full list of course providers for middle and high school students can be found at [https://www.gennet.us/tl\\_providers.htm](https://www.gennet.us/tl_providers.htm)
- Individual school districts/Intermediate School Districts that offer their own courses

#### **Our primary competitors for educator professional development**

- Individual school districts/Intermediate School Districts that offer their own courses
- Universities and Community Colleges
- Pearson

#### **Other providers for educator professional development**

- Edupaths
- ASCD
- PBS TeacherLine

### III. DESCRIPTION OF THE REQUEST

*Michigan Virtual* is seeking a full service creative and digital results driven agency to develop and implement a comprehensive integrated demand generation campaign for both for the **Student Learning** and the **Educator Learning** business units, complete with breakthrough creative that maps to a unique value proposition for our target personas, targeted messaging, content creation, tactics and sales enablement tools. ***The majority of the work must be completed and invoiced by September 30, 2019.***

#### A. DESIRED LONG-TERM RESULTS

In order for this initiative to be successful, the Vendor and *Michigan Virtual* must lay the groundwork to achieve these results over time:

- Generate marketing qualified leads (MQLs), increase conversions, and optimize conversions (via nurturing, lead scoring, and so on).
- Generate questions for follow up from our sales team to further qualify leads, with an emphasis on alignment between the two efforts and teams,
- Increase in revenue.
- Elevate the *Michigan Virtual* brand within the markets leveraging our expertise and extensive track record of success for customers with our solutions.
- Emphasize generating new clients, or upselling existing clients with new products. For the educator learning portion, a focus should be on converting users who take advantage of free offerings to paid users. Two-thirds of the effort should be given to generating leads for Student Learning, while one-third of the effort should be given to Educator Learning, converting free to paid users.
- Create content for all stages of the buyer's journey where appropriate depending on the overall integrated strategy.
- Align with *Michigan Virtual's* Mission, Vision, and Values, as well as meeting all brand standards.
- Develop integrated Programs including all demand generation promotional assets, specifically email templates, social media packs, SEM packs and plans, SEO recommendations and plans (aligned with our current SEO plan and efforts), influencer marketing tactics and plans, and event (tradeshow) creative and plans. The Integrated Programs should also make use of *Michigan Virtual's* newly created haptic piece and messaging. The haptic piece can be viewed [here](#). Please note that it is an interactive multi-fold piece of collateral that has space on the back for a sticker to be placed with a specific call to action based on the audience or promotion we are running.

#### B. KEY DELIVERABLES

Deliverables and tasks to achieve them noted below that will occur during implementation and include but may not be limited to the following elements:

- Audit all current marketing efforts for professional and student lines of business
- Segment, clean up and standardize our Hubspot CRM database in order to create sophisticated lead and customer nurturing strategies that address the goals and needs of both professional and student lines of business

- Lead generation strategy and plans
- MQL and SQL definition and lead scoring
- Copywriting
- Content creation, including sales enablement content where needed to support programs
- Paid media & SEO strategy (for campaign and programs)
- Design creative material including campaign/program content, direct mail & booth artwork [insert show schedule and booth per show here]
- Create retention strategies for existing districts and buildings for the student business
- Website updates (for campaign content where needed)
- Marketing technology stack strategy and management where needed, based on our current technology stack of Hubspot and WordPress
- Creation of a metrics dashboards and training where appropriate
- Other communications and/or marketing-related assistance as required
- Final report on deliverables and proposed next steps to continue to leverage the work

#### **IV. PROPOSAL CONTENT AND FORMAT**

In order to simplify the evaluation process and obtain maximum comparability, *Michigan Virtual* requires that all responses to this RFP be organized in the manner and format described below. Any relevant supplemental information should be included as attachments. *Michigan Virtual* is not subject to FOIA. Contents of proposals submitted are confidential and will not be disclosed to any parties outside of *Michigan Virtual*.

##### **1. Business Information.**

- a. Describe your business including legal business name, year the business was organized, legal status (corporation, partnership, sole proprietorship, etc.) state of corporation, approximate number of staff in your firm and if you plan to subcontract any of this work.
  - b. Provide a brief narrative (no more than one page) that outlines the firm's strengths and distinguishing skills or capabilities. Include key staff members who will serve on this team including, their credentials, related skill sets, billing rate and level of participation, along with contact information.
- 2. Proposal.** Your proposal must include the following as they relate to the Deliverables and how those will create the identified Results over time.
- a. Define the overview of how your agency will approach these global demand/lead generation campaigns for Student Learning and Educator Learning buyers.
  - b. Define how your firm will meet all stated meet Deliverables noted above.
  - c. Electronic examples that represent a selection of Global Integrated Campaigns including emails, social media ads, direct response material, collateral, sales enablement, ABM programs and website development created for current and past clients.

### 3. Fees.

- a. Line item fees for all services and deliverables, and an overall proposal total. Please align all work and fee descriptions by Student Learning and Educator Learning, keeping in mind our request for two-thirds of the effort being focused on Student Learning and one-third of the effort being focused on Educator Learning.
- b. Explanation of your firm's billing procedures, including rates.

4. **Implementation Plan.** Provide a draft plan, including timeline and responsible party for implementing your proposal. Identify planned meetings, asset sharing practices, approval processes. Include proposed performance measures on a quarterly basis wherever possible.

5. **Client References.** Provide the names and contact information for a minimum of three similar clients with brief case histories of your work for them.

6. **Nondisclosure Agreement (NDA).** All firms wishing to submit a response to this RFP are encouraged to sign and submit *Michigan Virtual's* Nondisclosure Agreement (NDA) along with their proposal in response to this RFP. A copy of the NDA is posted with this RFP on the *Michigan Virtual* website.

### V. SELECTION CRITERIA

Only the proposal of Diamond, Platinum, and Gold Hubspot Certified agency partners will be reviewed. These factors will be used by *Michigan Virtual* to select the firm that will be awarded this work.

- Fit between Vendor's experience and capabilities, and *Michigan Virtual's* goals, deliverables and needs
- Firm qualifications that demonstrate successful continuous operations as a marketing agency for a minimum of 24 months and possess full-service, in-house capabilities for marketing, creative services, production, media planning and placement, direct response and research
- Personnel qualifications and experience, with weight given to an account team that has the education, experience, knowledge, skills, and qualifications to provide these services
- Ability of proposal to be executed within an aggressive timeline
- Preference given to Michigan-based businesses
- Effectiveness of planned implementation approach
- Quality of references
- Competitiveness and value delivered in proportion to fees proposed
- Completeness of the proposal

*Michigan Virtual* reserves the right to make the Award to the Vendor of its choosing, reflective of our understanding of needs, the audiences served and results desired rather than solely based on pricing or other combinations of factors. Further, this RFP does not obligate *Michigan Virtual* to award any contract. We reserve the right to cancel the RFP at our discretion.

## VI. RFP QUESTIONS, DUE DATES, CONTACT

Here are key dates to be aware of for this RFP process.

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Please direct all correspondence and questions related to this RFP and the required elements as indicated below.

1. Emailed questions are due by Noon, Monday, August 12, 2019.
2. Responses to submitted questions will be posted on the website along with the original RFP.
3. One (1) electronic copy of your proposal sent by email to the contact below, and one (1) printed and signed hard copy of your proposal no later than Noon, Wednesday, August 21, 2019. Please note that the submission of the emailed materials will be the measure of on-time delivery rather than the arrival of the printed materials.

The single point of contact for RFP #08062019:

Elizabeth Elliott  
Director of Planning Services  
Michigan Virtual  
920 Municipal Way  
Lansing, MI 48917  
[eelliott@michiganvirtual.org](mailto:eelliott@michiganvirtual.org)

*Michigan Virtual* reserves the right to not consider late or incomplete proposals. Amendments to proposals will be included in our review only when they are received by the above deadline.