

Scope of Work March 3, 2023

2023 Marketing Program

Prepared for CAFII

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Overview

At our core, Operatic is a creative digital agency that solves complex business challenges with data-inspired strategy. Our strengths include research, creative and digital strategy, performance marketing, design including UX/CRO, and the development of websites/platforms/tools that better connect brands with their intended audience segments. We have a proven ability to produce deliverables that exceed our clients' expectations on time and on budget. To learn more about our approach and the value it drives for our clients, please [visit our website](#).

But enough about us, we're here for you – and based on our work together our primary focus for 2023 is going to be on improving the user experience of your online ecosystem while not losing ground on visibility. In this proposal we've included the following tactics which we've already briefly discussed with you:

- Website Hosting, Maintenance & Enhancements of front-end, consumer-facing portion of website (e.g. backups, plugin updates, uptime, speed, general security)
- Animated Video Creation
- Google Business Profile Management
- Year End Performance Report and 2023 Strategy

We're looking forward to continuing our long standing partnership.

Website Hosting, Maintenance & Enhancements

This year we'll continue to host and maintain the front-end portion of your website. Additionally, we'll ensure the creation of a dedicated URL for event posts, keep up to date on search engine optimizations and finally, we'll focus on User Experience (UX) to increase engagement with your website. Details as follows:

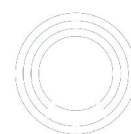
Website Hosting & Maintenance

Your website hosting and maintenance will include the following as they pertain to the front-end of your website:

- Hosting fee for your website
- SSL certificate fee – keeping your websites secure
- CDN fee – contributing to a faster website experience
- Automated backups – providing an up-to-date backup to rely on
- Uptime monitoring – proactively flag challenges with your site

Dedicated URL for Event Posts

We'll create a dedicated URL for each event post throughout the year, for CAFII to share with its members. We will use SEO best practices in the creation of the URL, which can contribute to search rankings. Events pages will include the research related to the event (where applicable) as a download link.



Search Engine Optimization Enhancements

Leveraging our work and results from 2022 we'll continue to optimize in order to stay aligned with shifts in search behaviour and algorithmic changes throughout 2023.

User Experience Enhancements

In an effort to improve the bounce rate on your website (as reported in the performance report) we'll focus on improving the user experience. Our focus will be on four main items for this year:

1. Home Page – we'll redesign the home page in order to create a scrollable experience which will include an intro to: CAFII, insurance, tools & resources, news, research & insights and contact us. We'll design the page, and we'll provide David Moorcroft with the content requests we require to build the page. Once built, we'll ensure optimization of the content and technical elements for SEO.
2. Insurance Page – we'll design and properly structure the Insurance Page. We'll leverage content from the insurance sub page – but will request David Moorcroft's support if we need to expand a little further to improve the experience. This initiative will be part of creating cohesion and continuity in the website's navigation bar.
3. Tools & Resource Page – we'll design and properly structure a Tools & Resources Page – which will include an intro into FAQs, Inquiries and Complaints, Helpful Links and How To Make A Claim. Again, this update will be part of creating cohesion and continuity in the website's navigation bar.
4. We'll create the same functionality on the Research section as the Event section (i.e. additional download links for related, downloadable content, where applicable).
5. We will add your LinkedIn profile link to the CAFII home page
6. We will adjust settings to ensure that all YouTube embedded videos do not have links displayed when the video concludes.
7. We will ensure that tracking is active and firing on the CAFII website, to ensure that we have real time access to all website data.

Animated Video

Continuing with our series, we'll create one 60–90 second on-brand, motion graphic video covering the topic of your choosing, during Q3–Q4. As always, the animation will be produced in both English & French, and deployed on your website. Once you've determined the video topic of your choosing, our process will be as follows:

Pre-Production:

1. CAFII will provide English and French scripts (which read no more than 90 seconds) to Operatic
2. Operatic will storyboard the English script for CAFII review and feedback
3. Operatic will complete one-round of revisions incorporating CAFII's feedback
4. CAFII will sign-off on the script and storyboard for production

Production:

5. Operatic will complete a rough-cut English animation (with FPO voiceover for pacing purposes only) as well as options for voice over talent and music
6. CAFII will provide feedback on the animation, and their selections for voice over talent and music
7. Operatic will complete the final English animation including voice over and music
8. CAFII will review the English animation and provide feedback
9. Operatic will complete one-round of revisions and minor graphic updates as needed
10. CAFII will sign-off on polished English animation output
11. Operatic will create the French animation including voice over and music
12. CAFII will review the French animation and provide feedback
13. Operatic will complete one-round of revisions related to pacing
14. CAFII will sign-off on polished French animation

*Please note that adaptations to this process may result in scope change orders.

Google Business Profile

Your Google Business Profile is an integral part of your online ecosystem, taking up valuable real estate within the search engine results page. Ensuring that you show up for searches related to your association has been a key focus of our activities in years past. This year, we're going to maintain your presence on Google Business Profile and ensure users continue to receive a positive user experience through the following:

Images & Video

We'll continue to upload any assets that you create and share throughout the year, and we'll ensure this year's video is featured on your GBP once complete.

Posts

In March, we'll create a content calendar that aligns with your business goals, key messages, and upcoming events for the rest of the year. Once approved, we'll create and publish two posts per month on your GBP. We will also leverage LinkedIn content, where appropriate, to use for posts.

FAQ / Responses

Leveraging the top FAQs from your website that we have not yet used, we'll pose one question per quarter on your Google Business Profile, and we'll answer it with the pre-approved response provided by **David Moorcroft**.

Additional GMB Content

GMB additions to list member companies – we will check with our internal team and confirm the possibility of doing this. The CAFII team to confirm if we are going ahead with this (to ensure that CAFII isn't perceived to be "selling or promoting" insurance products).

Website Back End Scope, Report & Strategy

In the fall, we'll scope out the rebuild of your member portal and will provide it to you for your consideration for 2024 budgets. Additionally, we'll prepare one Executive Presentation with data on performance, insights and recommendations for 2024's strategy which will be presented to the CAFII board in early 2024, and will include one round of revisions before the full presentation to the broader CAFII group. The report will be delivered by our CEO, Chris Barrett.

Project Governance

What About Feedback?

Feedback is an important part of our process, so addressing it needs to be a part of our workflow. Throughout our program (we'll need you to be especially active out of the gate), you will be given the opportunity to review and provide feedback before deliverables are implemented. We have included one round of revisions for all deliverables in this proposal. Should additional feedback be given after approval is received or one round of revisions is already completed, a Change of Scope Order will be required.

We ask that you do your best to be timely with your feedback so that we may keep your deliverables on time. We understand that from time to time unanticipated challenges arise which delay feedback from you. If this does occur, we'll communicate the effect of the delay on your project timeline.

Scope & Scope Changes

We're partners and as such will deliver what we've scoped in this document, whether or not we're on a budget. That said, from time to time new information, needs or wishes arise from our partners and it's important to note that anything that does not fall within this document is out of scope. When this occurs, our team will be diligent in ensuring that you're aware of the options you have available to you, as well as the pros and cons of each option. In cases where changes are determined to be necessary, a change request will be processed as follows:

- Operatic will create a Change of Scope Order that documents the relevant information, including but not limited to:
 - Description of the change
 - Rationale
 - Impact assessment
 - Effort
 - Associated incremental investment to implement the change
- This Change of Scope Order will be submitted to you and reviewed for final approval before we proceed.

Investment

Item	Investment
Website <ul style="list-style-type: none">• Host & maintain your front-end website• Create a dedicated URL for each event post• Ongoing search engine optimizations• Enhanced user experience on website	\$21,000
Video	\$12,000
Google Business Profile	\$3,500
Reporting & Strategy	\$3,500
TOTAL	\$40,000

Terms and Conditions

- Investment is shown in CAD and does not include applicable taxes.
- 25% due upon acceptance of this proposal
- 25% due on July 1st, 2023
- 25% due in October 1st, 2023
- 25% due December 1st, 2023
- All Invoices are net thirty (30).
- Operatic reserves the right to charge a late interest fee of 2.75% per month on invoices past due thirty (30) days.
- Accepted payment methods include cheque, EFT, and credit card. A 2.75% processing fee will apply to all credit card transactions.



Signature of authorized representative
Date:

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Date:

