

REQUEST FOR PROPOSAL

Trade Marketing Services

All materials and information contained within this document and/or subsequently disclosed in support of this process are considered CLIENT Confidential.

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1. Introduction

1.1 CLIENT Company Background

1.2 Objective/Intent

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CLIENT desires to create a contractual relationship with a Strategic Supplier for Trade Marketing Services capable of helping to define our trade marketing needs, drive the planning process, and flawlessly execute superior ideas that differentiate the CLIENT family of brands and products in the marketplace and channels.

CLIENT is seeking a Strategic Supplier who will be a key component to the newly centralized Trade Marketing Organization. This Strategic Supplier shall be expected to assist CLIENT in our efforts to develop a solution that supports CLIENT's current programs such as Trade Customer Media Planning (including asset management, ad building and media plan construction), Co-Op Advertising Reimbursement (Co-Op), Performance Marketing (Incentives Programs/Spiffs), and Marketing Material Order Placement (One-Line Catalog). The preceding program list should not be considered to be all inclusive as other programs will likely be added as the Trade Marketing Organization grows and develops.

It is expected that a Strategic Supplier will be able to offer a solution that is robust enough to grow with CLIENT's business portfolio. The ease of use of the system is imperative (must be simple and intuitive) in order to support CLIENT's directive to offer our Trade Customers solutions that make us "Easy to Do Business With". We must be able to evaluate the effectiveness of the programs and monies spent with thorough measurement and analytical capabilities.

It is furthermore required that this solution be through a complete on-line system with all functionality and activities available to all users via the World Wide Web. This solution will be required to link with other CLIENT providers and systems in order to present a common forward facing solution to the participants.

The intent of this RFP is to understand from each Strategic Supplier how they could best meet the needs of CLIENT not only in the North-America Region (United States), but also present a global vision and strategy for our Trade Marketing Services needs in the future. In addition, this RFP will help CLIENT to identify Strategic Supplier(s) of quality and determine which Strategic Supplier(s) can offer the best overall value for CLIENT. In addition to the quality products and services, CLIENT expects logo integrity, creative and innovative collaboration and personalized service from its Strategic Suppliers.

The objective of this document is to provide to all perspective Strategic Suppliers an overview regarding our current Trade Marketing programs. The Strategic Suppliers should recognize that as the CLIENT Trade Marketing organization grows, the opportunities for a forward thinking Strategic Supplier will increase. Strategic suppliers should note that the programs involved in this RFP are currently sourced across the supply base and a primary goal is to consolidate our trade marketing programs and in doing so identify opportunities for improvement to better serve the CLIENT and our trade customers.

1.3 Audience/User Community

2. RFP Terms and Conditions

2.1 Terms of Submission

All proposals and responses to this RFP need to be returned in the format given in the following sections. The remainder of this section provides guidelines on the terms of submission of your proposal.

Review of RFP responses:	date
Supplier Presentation:	date
On-Site Visits:	date
Supplier Selection:	date

2.4 This RFP Is Not an Offer to Contract

This RFP is not an offer to contract, nor should it be construed as such. It is a definition of specific CLIENT requirements and an invitation to recipients to submit responsive information addressing such requirements. Issuance of this RFP, your preparation, and submission of a response, and the subsequent receipt and evaluation of your response by CLIENT do not commit CLIENT to award a contract to any offer or even if all of the requirements stated in the RFP are met. CLIENT reserves the right to make no selection and enter into no agreement as a result of this RFP. Only the execution of a written agreement between CLIENT and a Strategic Supplier will obligate CLIENT in accordance with the terms and conditions contained in such agreement.

2.5 Your Response to This RFP Constitutes an Offer to Do Business

The purpose of this document is to explain CLIENT requirements and to provide instructions for the preparation of your information in response to this RFP. It seeks to establish a common framework within which the final terms of a Master Agreement may be reached. It should be understood that your response to this RFP constitutes an offer to do business on the terms stated in your response and that, should a contract be awarded to you, CLIENT may, at its option, incorporate all or any part of your response to this RFP in the contract.

2.6 Terms of Payment

CLIENT's standard pay terms in net 90 for services. Strategic Supplier shall provide monthly itemized invoicing for every invoice cycle – separating product and service – according to CLIENT's standards.

2.7 Pricing Structure

CLIENT expects that Strategic Supplier provide a detailed pricing structure for each initiative listed in section 5.

2.8 Governing Law

The Contract shall be interpreted in accordance with the laws of the State of xxxx.

2.9 Use of Company Name

The Strategic Supplier may not use CLIENT's name in any advertising copy or other promotional materials or messages without CLIENT's prior written approval.

2.10 Personable Identifiable Information (PII)

“Personally Identifiable Information” means all personally identifiable information provided by CLIENT to a Strategic Supplier in any tangible or intangible form. CLIENT expects that a Strategic Supplier will establish and maintain data security procedures and other safeguards against the destruction, corruption, loss or alteration of Personally Identifiable Information, and to prevent access, intrusion, alteration or other interference by any unauthorized third parties of the same.

3. Evaluation Criteria

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A cross-functional evaluation team will perform an evaluation based on the written responses, discussions with Strategic Suppliers and Strategic Supplier presentations. After evaluation of written responses, additional information may be requested. Following these tasks, they will make a recommendation to management based upon certain evaluation criteria. Strategic Suppliers will be notified whether they were or were not selected as the Strategic Supplier of choice after final evaluation.

Based on mutually beneficial contract negotiations, CLIENT will enter into a contract with the selected Strategic Supplier, if one does not already exist. CLIENT expects that any claims made by the Strategic Supplier in their response to this RFP will be used for inclusion in any future contract.

CLIENT reserves the sole right to accept any response that it feels best meets its interests and needs. CLIENT reserves the right to waive any irregularity, informality, or non-compliance in information received. CLIENT reserves the right to negotiate modifications to any single Strategic Supplier's response without an obligation to negotiate a similar modification to other Strategic Suppliers' responses. CLIENT reserves the right to reject any or all Strategic Suppliers' responses, including the lowest cost response.

3.1 CLIENT's evaluation criteria will include the following key factors:

- Strategic Supplier's experience and success in strategic and tactical Trade Marketing Services efforts;
- Strategic Supplier's global strategy and support capabilities;
- Strategic Supplier's customer service/ customer support proposal;
- Strategic Supplier's dedicated account team (Staffing plan);
- Strategic Supplier's analytics capabilities;
- Strategic Supplier's technological capabilities;
- Strategic Supplier's best overall value.

3.2 Proven Track Record

CLIENT will only work closely with financially stable and successful Strategic Suppliers with significant experience in providing Trade Marketing Services. This will be judged, in part, through financial performance, customer references, industry benchmark information and suggested program requirements provided to CLIENT.

4. Timing

The anticipated starting timing for a contract is date.

5. Project Overview

The sections below include descriptions for the current in-scope programs included in the Trade Marketing Solution. CLIENT expects that a Strategic Supplier would review this information and make recommendations as to how their solution can support these as well as identify opportunities for enhancement and/or improvement to better support CLIENT's Trade Marketing needs.

5.1. Performance Marketing (Incentive Programs/Spiffs)

5.1.1 Current State:

5.1.2 Key Information:

Program Information	Estimated Volume

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5.2.1 Current State:

5.2.2 Key Information:

Program Information	Estimated Volume
Number of Brands	
Number of SKUs (Co-Op)	
Number of SKUs (CoBranding)	
Number of Claims – all programs	
Number of Ad Reviewed in Claims	
Number of Markets Monitored Currently	
Number of Major Newspapers Monitored Currently	
Estimated Number of MAP Audits	
Estimated Number of MAP Violations Identified	
CoBranding Spend	
Claimback Co-Op Spend	
Paid as Earned Spend	
User Community Information	Estimated Volume
CoBranding Trade Customer	
Claimback Co-Op Trade Customers	
Paid as Earned Trade Customers	
Number of CLIENT Field Account Managers	
Reward Structure and Funds Management	Estimated Volume
Payment Frequency	
Payment Method	
Customer Service	Estimated Volume
Inbound Calls	
Inbound Emails	

5.2.3 Co Branding Process Information – Current State (Strategic Supplier should propose future state):

5.3. Asset Management and Ad Building

CLIENT has a need of an on-line asset management system whereby various types of assets (ad templates, images, product information, rebate forms, selling tools, etc) that will be uploaded by multiple sources (agencies, CLIENT users, etc) and have varying degrees of accessibility to the users (driven by purpose and user permissions). These assets will need to be displayed in the appropriate section of the website depending upon the purpose of the asset. It is also expected that assets that are uploaded will be associated with a lifecycle (effective dates) and that once the asset is no longer active it will move to an archived state but still accessible based on permissions.

The system will also need to link to CLIENT’s digital library and other designated sites in order to supply images and information used in the Ad Builder tool.

The system will need to provide the capability to create advertising using some type of Ad Building tool. It is expected that the Strategic Supplier would provide customer service support representatives to the audience (referenced in section 1.3) with a strong creative background.

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5.3.1 Key Information:

Program Information	Estimated Volume
Number of Assets	
Number of Templates	
Number of Ads built using Ad Builder (estimated xx% of all adds claimed will be built using this functionality)	
Customer Service	Estimated Volume
Inbound Calls	
Inbound Emails	

5.4. On-Line Catalog for Marketing Material

5.4.1 Current State:

The Strategic Supplier needs to have the capabilities to establish and manage an on-line catalog of Marketing Materials and allow our Trade Customers the opportunity to order such materials. Material information will be provided to the Strategic Supplier by CLIENT or it’s agencies. Material posted to One-Line Catalog is required to have a pre-established life cycle of availability (including expiration/scrap date).

Some of the material available will require payment by the Trade Customer. These materials will be fulfilled by a designated CLIENT fulfillment provider and as such it is not expected that the Strategic Supplier responding to this RFP have nor expect to be utilized for fulfillment. Strategic Supplier will need to be able to communicate with fulfillment provider on material availability issues, order placement and expiration notices as it is expected the One-Line Catalog data will help drive warehouse processes for maintenance and destruction of material.

It is expected that the One-Line Catalog system have the ability to create and display the on-line catalog, allow Trade Customers to place orders designating method of payment, process and forward orders to fulfillment supplier and receive shipment information from fulfillment supplier that will be displayed for the Trade Customer’s future reference.

Payments for orders may be obtained from the Trade Customer directly or if the Trade Customer has Co-Op funds available, a portion of the material may be paid for using those funds. The Strategic Supplier will need to be able to adjust the Trade Customer’s available Co-Op funds balance based on the transactions. Payments received for Marketing Materials will be returned to CLIENT to be credited to the appropriate Cost Center.

5.4.2 Key Information:

Program Information	Estimated Volume
Number of Marketing Materials in Catalog on an ongoing basis	
Number of Marketing Materials added to Catalog on a monthly basis	
Number of Orders on an annual basis	
Estimated Payments for Marketing Materials Obtained from Trade Customers	
Customer Service	Estimated Volume
Inbound Calls	
Inbound Emails	

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Please indicate if any of these services would be subcontracted and where they would be geographically located.

It is expected that account representatives for the Strategic Supplier will be available from 8am to 8pm - EST) and that there are designated representatives who will be available on an as-needed and/or emergency basis who have provided after hours contact information.

5.8 Technological Expectations and Requirements

It is expected that the Strategic Supplier explain their technology platform, relative to the solution recommended in this RFP response, and explain what portions of this solution currently exist at the Strategic Supplier in current offerings and what portions would need to be developed. Supplier shall clarify if an in-house development staff is utilized or if it is an outsourced commodity.

Strategic Supplier shall provide a detailed Quality Control and Security Policy (data accuracy, integrity etc) as well as a Contingency and Disaster Recovery Plan in order to secure the database and activities related to the services listed in section 5.

5.9 Analytics

CLIENT needs a Strategic Supplier with a solid background in analytical techniques who will be able to provide recommendations to CLIENT on establishing and monitoring Key Indicators for the Programs involved in Trade Marketing in order to analyze program effectiveness.

5.10 Service Level Metrics

CLIENT would expect a detailed overview and current demonstrative performance of proposed service level metrics (SLA) and conceptual flow diagram of processes and information for each initiative listed in section 5:

- Performance Marketing (Incentive Program/Spiffs)
- Cooperative Advertising Programs
- Asset Management and Ad Building
- One-Line Catalog
- Customer Service Center
- Training Plan
- System (Technological)

5.11 Detailed Project Implementation Plan and Staffing

CLIENT would expect that the Strategic Supplier would provide as part of their response to this RFP, a detailed Project Implementation Plan including but not limited to project scoping exercises (discovery), design, development, testing and implementation. This plan should include how the supplier recommends managing this project with regards to Staffing, Process Management and Documentation as well as timing for each step of the process in order to meet a date launch.

5.12 Marketing/Training Plan

CLIENT would expect that Strategic Supplier provides a detailed marketing campaign and training plan to support the launch on the initiatives listed in section 5. This plan should include but not be limited to how the Strategic Supplier suggests communicating to the intended audiences (referenced in section 1.3), marketing the benefits of the new system, enrolling and training the various users in order to ensure a successful transition and on going trainings and

improvements. Strategic Supplier should also include a plan for analytics in order to understand the overall effectiveness of the individual components of the plan.

6. Global Strategy and Execution Capabilities

CLIENT needs a Strategic Supplier capable of being a Global Strategic Supplier which means operating with a global platform. Strategic Supplier shall provide details that ensure a Global Strategy and Execution Capability with examples of current global capabilities and/or expansion plans to support global initiatives.

7. CLIENT Expectations with Regard to Annual Cost Improvement Activities

CLIENT's expectation is that the Strategic Supplier is capable of exceeding our requirements and plans to provide improvements in cost, quality, delivery and support each and every year. We expect our Strategic Supplier to have the subject matter and commercial expertise for their various products/services in order to identify efficiencies, provide cost savings opportunities and drive business process improvements.

8. Response Requirements

Strategic Supplier's response should be in written form and address all topics covered in items numbered 5-7 in the above sections as well as the information found in Attachment A. The supplier should provide a thorough and detailed proposal designed to convey to the CLIENT community how the Strategic Supplier is best positioned to support the Trade Marketing Organization including conceptual process flow diagrams and any other examples to help the CLIENT team understand the proposal.

The cost proposal section of the response should be very detailed and identify costs for each Trade Marketing program described. The Strategic Supplier should be sure to differentiate the cost associated with the design, development and launch of each program versus the ongoing fees once the program has been launched.

ATTACHMENT A

Response Template

Given the business requirements, please provide your responses in the given area to each of the questions below. Answers not provided in this format will not be taken into consideration. Please add more space and/or reference attachments where necessary.

Section 1: Strategic Supplier Detail

1.1. Strategic Supplier Contact Information:

Company Contact Information	Full Legal Name	
	Address (not a P.O. Box)	
	Main Telephone	
	Main Fax	
Parent Company (if applicable)	Full Legal Name	
	Address (not a P.O. Box)	
Key Contact Information	Name	
	Position/Title	
	Direct Telephone	
	Direct Fax	
	E-mail Address	

1.2. Describe the core competency versus business activity of your company.

1.3. Provide the following ownership/structure information of your company.

What was the date your company was established?	
Is your company publicly or privately held?	
Does your company procure material, merchandise, or services from xxxx companies?	
How many years of experience does your company have in the Trade Marketing Services?	
How many employees does your company have?	

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1.4. Provide the following information regarding your top 5 current customers.

Rank	Customer Name	% of business this customer represents
1		
2		
3		
4		
5		

1.5 Please advise if any of your customers have terminated the agreement/relationship with your company. If so, please indicate why and when it happened.

1.6. Provide an outline of your company’s locations and facilities in the chart below (please add more rows if necessary).

Address of Location / Facility	Number of employees	Key functions/ activities	Hours of Operation	Storage capacity/ square footage	Age of facility

1.7. From which facility would you propose servicing CLIENT’s needs? Why do you propose this particular facility?

1.8. Are any employees in your organization represented by a union? If so, please provide the length of the current contracts and their expiration dates.

1.9. Please provide 3 customer references, having similar attributes and volumes as CLIENT if possible in the chart below.

Customer Name	Primary Contact	Detail scope of work	Volumes	Program requirements	Years of service

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Section 2: Company Presence

2.1. Describe how your company would propose manage the CLIENT Account pre and post launch (as an example: on site, remote, monthly on site meetings, annual business review etc.).

2.2. Describe how your company would tie in and support CLIENT’s corporate objectives and initiatives such as:

- Diversity with Inclusion: The only way to succeed is if everyone feels like they can contribute to the business and their voices are heard. That is why CLIENT constantly seeks fresh approaches, new ideas and different outlooks to achieve success.
- Respect: This value has helped CLIENT succeed for almost a century.
- Integrity: CLIENT produces the highest quality products at the best possible prices for CLIENT’s Customers with honesty and admiration.
- Teamwork: CLIENT team work together to makes things happen.
- Spirit of Winning: In the Spirit of Winning culture, everyone is a leader, responsible for his or her own actions. With full awareness and understanding of CLIENT’s strategic aims, these individuals and team actions will drive outstanding performance.

Section 3: Pricing Structure

Please provide a detailed cost breakdown according to the items below and their definitions.

<i>Initiatives / Cost breakdown</i>	<i>Performance Marketing (Incentive Programs/Spiffs)</i>	<i>Cooperative Advertising Programs</i>	<i>Asset Management and Ad Builder</i>	<i>All initiatives</i>
1. Process Cost <i>(List all items, descriptions and costs)</i>				
-				
-				
-				
- Others				
2. Technology <i>(List all items, descriptions and costs)</i>				
-				
-				
-				
- Others				
3. Training <i>(List all items, descriptions and costs)</i>				
-				
-				
-				
- Others				
4. Others <i>(List all items, descriptions and costs)</i>				
-				
-				
-				
-				