

SEQUEL

Campaign Strategy

(Workbook, tab 6, Q: 1, 2, 9, 10, 13, 14)

PREPARED FOR SAP RFP: WORK EXAMPLES

GROW with SAP Awareness and Demand Gen Campaign Assignment: Creative Strategy Brief & Mood Boards

Grow with SAP Awareness Campaign

What is both the objective and the specific problem we're trying to solve?

The Objective: To reposition SAP as being a relevant, go-to ERP partner for mid-market companies and organizations through the GROW with SAP solution.

The Challenge: SAP is perceived as being cost-prohibitive and difficult to navigate its portfolio of products and solutions (e.g., SAP Business ByDesign, SAP Business One, etc.). Additionally, SAP is seeking to overcome the following market perceptions:

- Legacy impressions as not being relevant or accessible; SAP is historically known for working with only the largest of enterprises as an on-premise vendor.
- Difficult to implement, update and use; SAP is also seen as complex, time-consuming and costly in getting the solution up and running.

What is the key insight driving the campaign strategy?

Mid-market companies don't like being called "mid." They also believe that complexity in ERP technology and extended time-to-value implementation plans impede their ability to focus on growing the business. They are doing the best they can as they expand their product set, service customers while their teams are working with a mixed bag of on-premise ERP, to cloud-based finance and planning to disconnected CX tools that do their job, but are not delivering optimal value.

Bottom-line: Mid-markets are using tools and technology that do not talk to each other and not allowing the business to accelerate their growth by freeing up their teams to focus on the work that matters. They have outgrown their existing systems.

The Solution:

GROW with SAP allows mid-market companies seeking a "fit-to-standard" ERP customization strategy that allows SAP to meet them where they are so they can continue to grow; avoiding extended implementation timelines and complexities.

The emphasis is on speed, predictability, and continuous innovation; three areas relevant to the business and technology needs of midmarket companies.

Target Personas:

- **CEO, CIO, CFO, LOB Leadership / *What they care about:***
Total Cost of Ownership / Time-to-Value / Ease of use and adoption/ ROI calculations from a corporate and LOB perspective
- **Directors, VP of IT and Systems / *What they care about:***
Ease of implementation and integration / "Up and running" time / Technology roadmap and future-state planning
- **Think/ Feel/ Do: *We want the customer/prospect...***
Ease of implementation and integration / "Up and running" time / Technology roadmap and future-state planning
 - **To think** about SAP in a new way; as a relevant cloud ERP partner who gets them; meeting them where they are in their journey.
 - **To feel** a sense of surprise and delight with a dash of wit and imagination as an enterprise brand that understands the entrepreneurial spirit of the mid-market customer.
 - **To connect** to our success stories, our thought leadership and targeted virtual and in-person events.

01. Grow with SAP Awareness Campaign: Creative Moodboard

Out-of-Home Advertising



LinkedIn Advertising



Experiential Marketing



Digital Advertising



GROW with SAP Awareness and Demand Gen Campaign Assignment: Creative Strategy and Content Idea for Demand Generation Campaign

Grow with SAP Demand Gen Campaign

The Ask: To activate/promote the offer across various channels including paid, with intent to foster meaningful interactions and guide prospects to conversion. Ensure that your choice of tactics channels and creative direction are directly informed by the provided Grow w/ SAP inputs.

The Idea: To invite business owners/CEOs/Presidents, CFOs, Directors/VPs/Heads of Finance to engage with the educational and inspirational content we plan to produce based on the key concept: *Growth University or SAP Growth U*.

The idea behind Growth U is to help this mid-market audience with understanding how to invest in a system that grows with you, and how SAP can help foster that growth to take full advantage of operating in the cloud. The key here is to help, not sell and we believe SAP is in a unique position to help brands understand how a Cloud ERP, even if just initially onboarding only some of the components of a full ERP system, can help modern firms evolve and adapt over time to keep the momentum moving forward as they continue to scale their business. While we plan to have a number of different pieces of content in a variety of formats, Growth U would dually serve as a destination for pre-built educational tracks (perhaps based on industry, ERP maturity, revenue size, or specific business challenge, e.g., CX, HCM, etc.) as well as a repository for all SAP mid-market content.

The Content Formats:

- SAP Growth U microsite
- Podcasts (can be used to interview current customers to help with churn/satisfaction/loyalty)
- Videos
- Guides or How To's
- Whitepapers
- Webinars
- Blogs

The Solution:

The Channels: To promote Growth U and its content, we plan to run paid media in clickable channels to drive traffic and attention to the Growth U content hub. Those channels include paid social on LinkedIn and YouTube, paid search to capture intent, business publications aimed at the mid-market space (Wall Street Journal with custom targeting, Inc. Magazine, Fast Company, Business Insider, etc.).

In addition, we would use ClearBit data, or the like, to target display, native, and video advertising (including Connected TV) to:

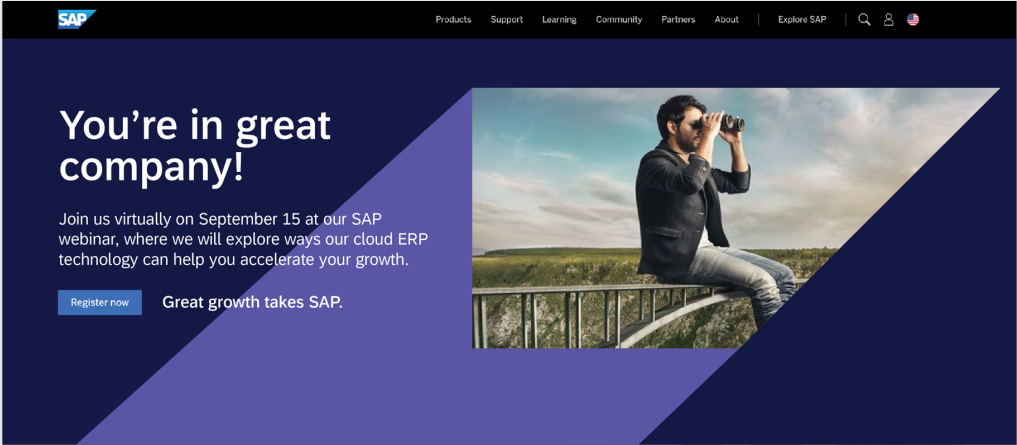
- a) ideal customer profiles (based on geography, industry, technographics, and/or company size) and
- b) any high-priority target accounts. Running in parallel to the paid efforts would be best-in-class SEO strategies and tactics to climb the organic search results rankings and push even more traffic to the Growth U hub.

An innovative idea for distribution of content: Create an SAP mid-market focused community Slack channel where SAP could leverage its network to invite both prospects and customers in to share 'growing pains' stories (be it positive or negative) and offer how SAP can collaborate and support users who provide their stories.

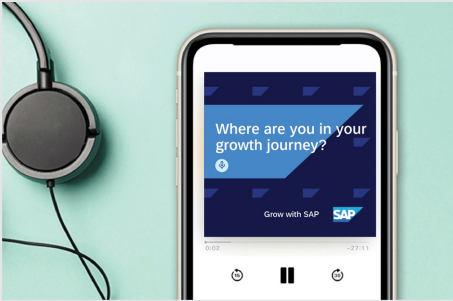
A note on demand gen vs. awareness campaigns: Our idea is to have brand awareness campaigns in market 4-6 weeks before the demand gen campaign goes live and then continue to overlap as the demand gen campaign continues to run. The idea being the demand gen creative would be complementary to the brand awareness campaign.

02. Grow with SAP Demand Gen Campaign: Creative Moodboard

You're in Great Company! Webinar



Podcast



You're in Great Company!
Customer Stories (Video Series)



Growth University
By invitation only, ERP educational program: includes downloadable 1-pagers such as FAQs and customer success stories, links to blogs, podcasts and more.)



13 weeks

1,218 naming concepts

15 logo and VIBE concepts

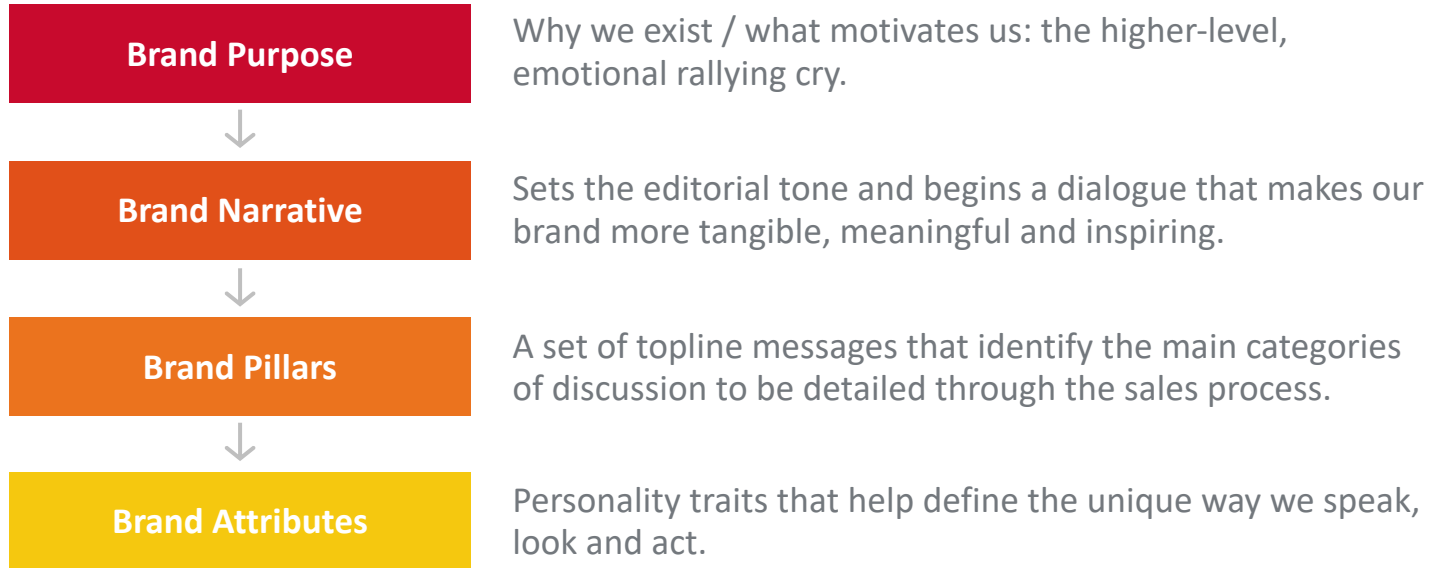
4 work streams in parallel

= 1 Unified, Award-winning Brand

(Q:10) CHOREO CASE STUDY

What We Focused On

The brand platform includes a number of key elements, each with its own clear purpose.



Brand Purpose

NewCo's purpose is simple and powerful.

Be they clients or colleagues,
our servant mindset means
understanding each
individual's needs and values.

Helping you achieve your future.

We enable success by
partnering closely with clients
and each other; we aren't
motivated by our individual
achievements.

We're planners, but we're also
doers. We make getting from
point A to point B happen.

We aren't about shiny new
objects and short-term gains —
we're focused on the holistic
planning needed to realize
clients' big picture goals.

Brand Narrative

Your passion, hard work and good fortune led you here.

Now it's time for a partner with a keen understanding of your needs and goals, who can steward your wealth. One focused on solving your problems, not selling you products.

With our tax and financial planning heritage, we have a unique and proven ability to see beyond the numbers. And, harnessing the latest technology, we're building even stronger, more collaborative relationships.

Together, we bring unique value to what matters — the future you're building today.

Brand Pillars

NewCo is built upon three key brand pillars. While others offer more of the same, one of the things that sets us apart is our unique combination of strengths.

Heritage-rich, future-leaning

We have a long track record of serving the diverse needs of our clients, but we don't rest on our laurels — we always keep our eyes forward, seeking new ways to build our clients' future.

Tech-enabled, relationship-focused

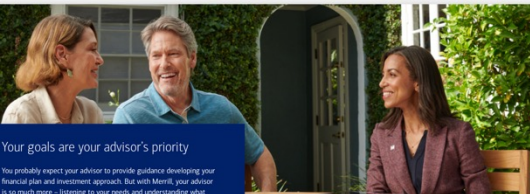
We empower our advisors with the latest digital tools, but all that we do is geared towards staying close to our clients in a way that makes their lives easy and gives them peace of mind.

Broadly capable, needs-driven

We offer broad resources and an array of related, relevant solutions, but we stay focused on objectivity and meeting the needs of each individual client.

Lifestyle imagery, blue color palette, serif typography are overused in the wealth management category.

A banner for Merrill Lynch Bank of America Investment Services. The top left features the Merrill Lynch logo and the text "BANK OF AMERICA INVESTMENT SERVICES". The top right contains navigation links: "Client login", "Contact Us", and a magnifying glass icon. Below these are four service categories: "Working with Us", "Your Life Priorities", "Research & Insights", and "Find an advisor". The main body of the banner has a dark blue background with a white central box containing the text "Let's build a plan all about you". Below this box, a white text block reads: "Welcome, we're glad you're here. We'd like to introduce ourselves, show you what it's like to work with an advisor and share the benefits you can enjoy with investment solutions from Merrill and the full range of capabilities from Bank of America." At the bottom, three links are listed: "Why Merrill", "Our Advisors", and "Working Together".



Your goals are your advisor's priority

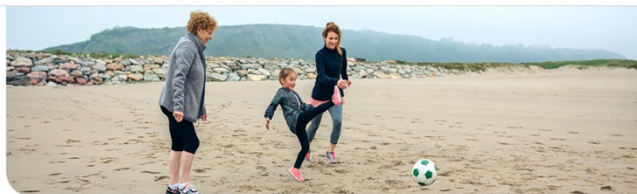
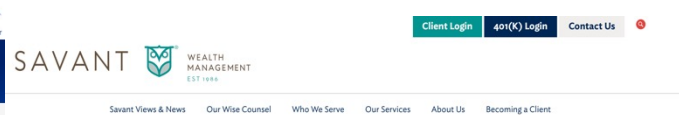
You probably expect your advisor to provide guidance developing your financial plan and investment approach. But with Merrill, your advisor is so much more – listening to your needs and understanding what matters most to you and your family. You and your advisor will work together one on one to help create a strategy that's uniquely yours.



Discover goals-based advice that inspires confidence

01

A Wealth of Expertise



Cents of Self

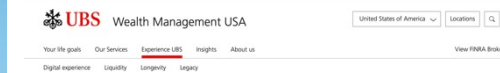
Empowering Women to Take Control of Their Financial Future

At Savant, we have a diverse team who are committed to empowering women. We recognize that while the basics of money management have nothing to do with gender, women often have different financial challenges and unique financial planning needs. They tend to live longer, save less, invest more



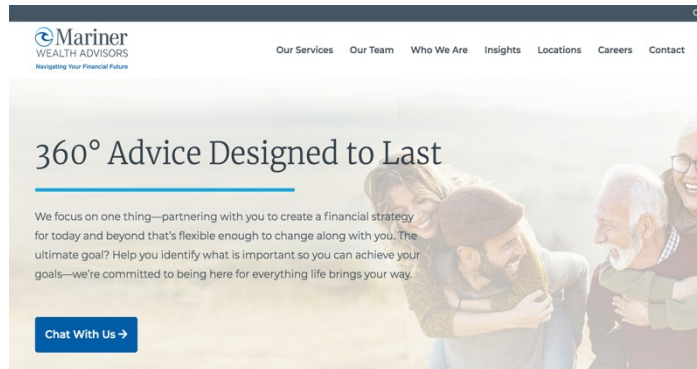
ers in business and the community, we still see the

Take further along the path to financial literacy.



Wealth, from your point of view

Your wealth is about more than stocks and investing. **It's about you.**



Morgan Stanley

Wealth Management

At Morgan Stanley Wealth Management, our Financial Advisors start with you, focusing on your needs and goals, and remaining committed to helping you grow your wealth and pursue your financial



Competitive Audit: Marketplace Color Spectrum

Blue and green are common colors used in the wealth management category. Reds, browns and golds are used as well. Finding a color that both distinguishes your brand and elevates your story is key to building a more memorable brand.



Morgan Stanley

Mariner
WEALTH ADVISORS
Navigating Your Financial Future

SAVANT
WEALTH MANAGEMENT
EST. 1988

MOSSADAMS

Edward Jones
MAKING SENSE OF INVESTING

FORUM
Financial Management, LP
A Registered Investment Advisor

UBS Wealth Management

MERRILL
A BANK OF AMERICA COMPANY

plante moran
audit • tax • consulting • wealth management

SIGNATUREFD

NORTHERN TRUST

CREATIVE PLANNING

RSM



ASPIRIANT

Choreo

Bringing unique value to what matters — the future you're building today.

Derivation

From *choreography*, the art of composing dances as well as planning and arranging movements, steps and patterns.

Rationale

Bringing a dynamic, positive energy to our relationships as we define the most appropriate steps in clients' financial plans.

Trademark prescreen rating: Good

Choreo™



Choreo

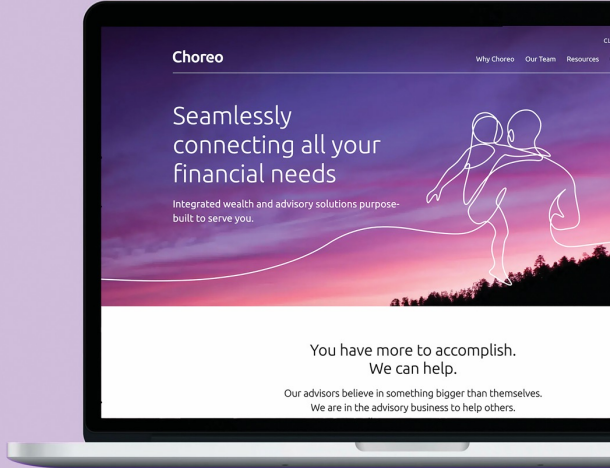
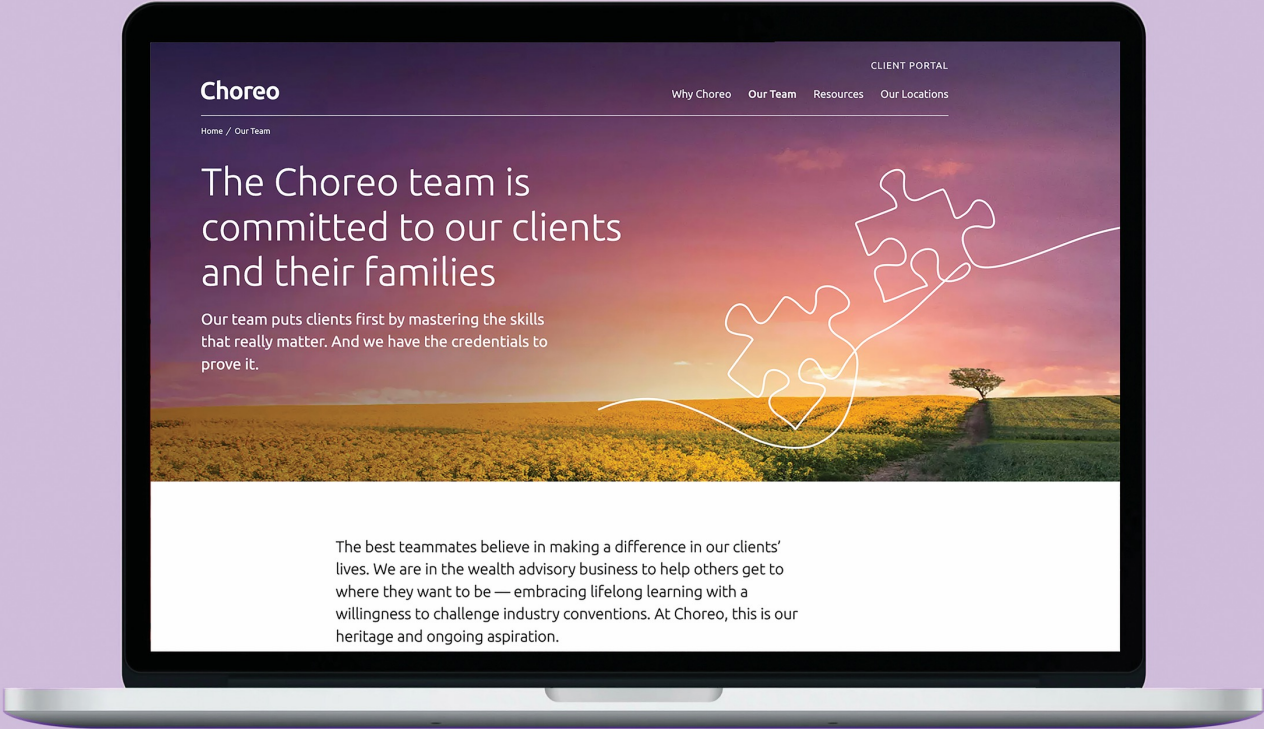
Anne Swanson
Financial Advisor

151 W 42nd Street, 19th floor,
New York, NY 10036

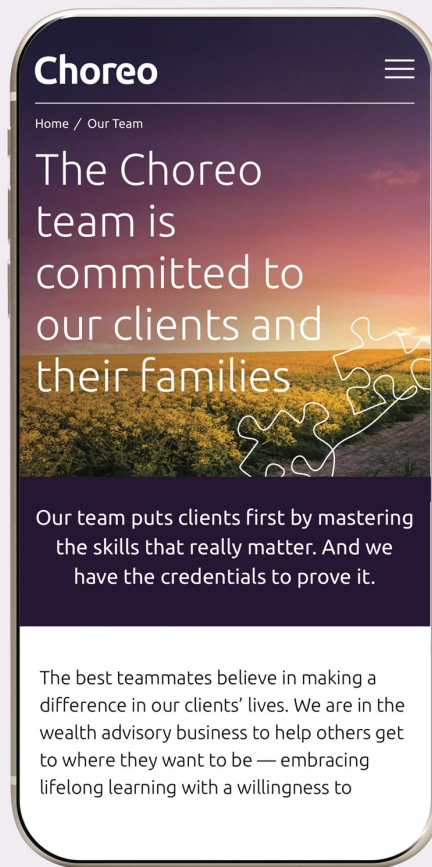
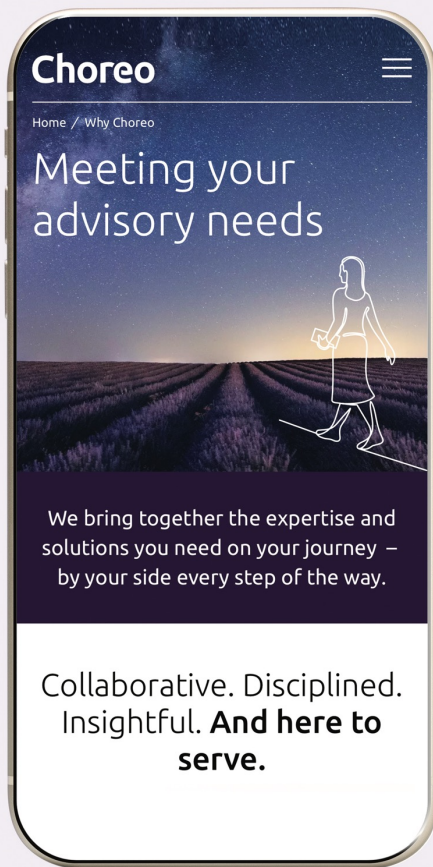
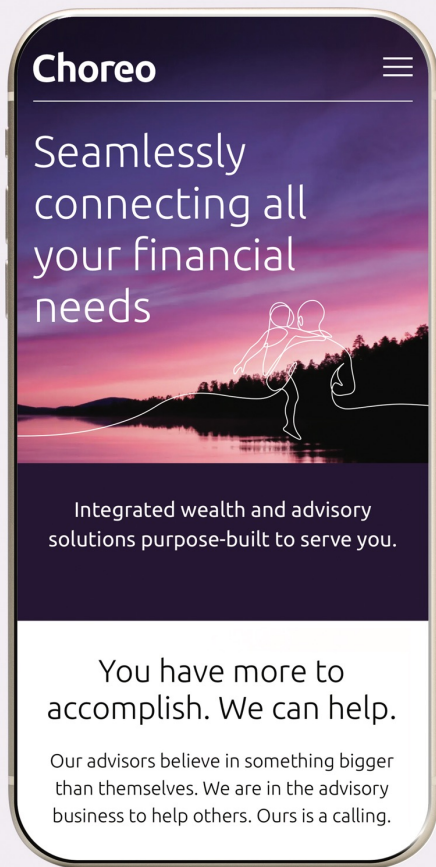
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aswanson@choreoadvisors.com
choreoadvisors.com

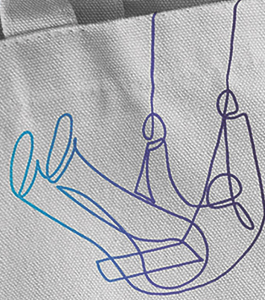
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Website

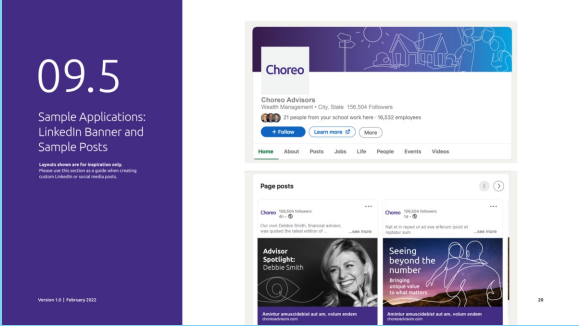
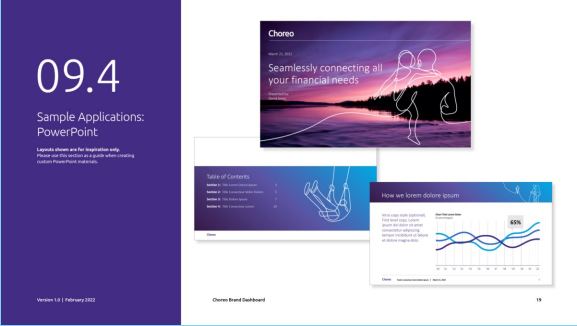
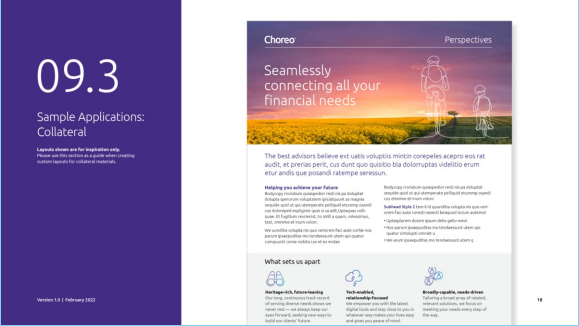
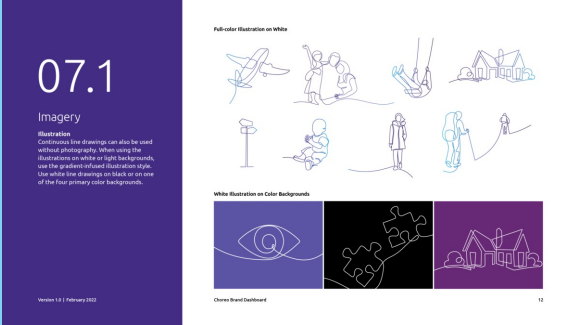
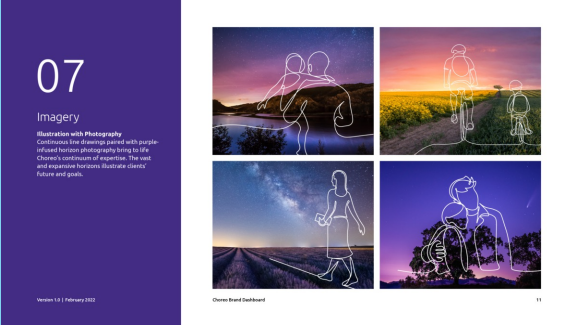


Premiums



ChoreoTM

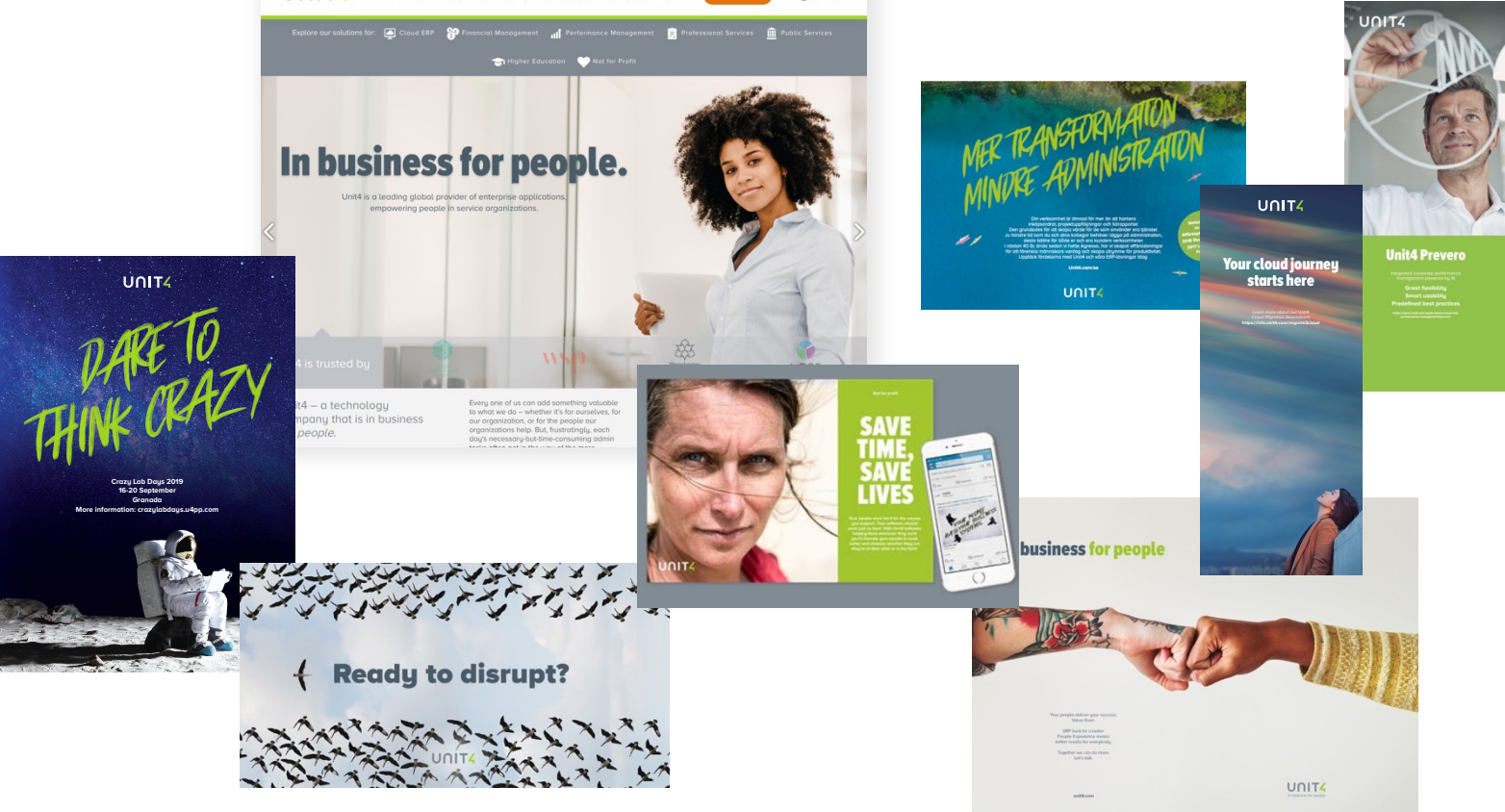
Brand Guidelines



Unit4 Technologies

(Q:14) CROSS-SELLING CONTENT CAMPAIGNS

Before



Brand Story

**Experience real purpose.
That's what your people want.**

Now you can offer them not just a better place to work, but a better way to work. An elevated experience of how things get done.

That's what we deliver for students and professionals to the public servants and non-profits doing good in the world. For people in the business of helping people.

For you.



Brand Story

We provide People Experience software that's self-driving, adaptive and intuitive, purpose-built for people-centered organizations like yours.

Systems that set people free and guide them to the right answers, right now.

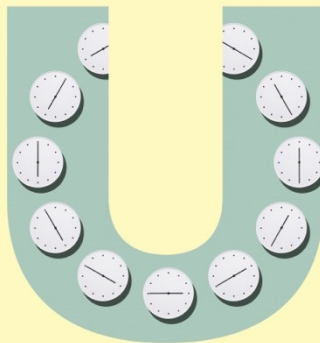
So your people can spend more time doing the meaningful, high-value work they live for. Working at their best to improve people's lives.



Brand Story

People Experience.
It's how work should feel.

Unit4
In business for people



Product Taxonomy and Nomenclature

MOVE FROM  TO

Existing Corporate Name:

UNIT4

Continuing Corporate Name:

UNIT4

The corporate name remains — mitigating much of the cost of changing the business name.

Existing Product Suite Name:

None

New Product Suite Name:

Unit4 People Experience Suite

Unit4 is used at the suite level to add value to the brand; People Experience Suite highlights our direction and people focus.

Existing Product Names:

Unit4 Business World (Agresso)

Unit4 Financials

Prevero

Intuo

Unit4 Student Management

Unit4 PSA Suite

New Product Names:

Unit4 Enterprise Resource Planning

Unit4 Financial Planning and Analysis

Unit4 Human Capital Management

Unit4 Student Management

Unit4 Professional Services Automation

Product names use industry-standard terminology to make them easily understood and easy to find for prospects; this helps SEO performance, since prospects shop for these terms. Using the Unit4 name associates the brand with the products, which is also expected to support SEO results.

Sales Enablement Graphic

Unit4 People Experience Suite



People Platform

connect and create:



extensions



integrations



applications

Elevate Your Business

Unit4 Enterprise Resource Planning (ERP)

- Financial Management
- Budgeting
- Project Management
- Procurement
- Reporting
- Estate & Asset Management

Unit4 People Experience Suite



Engage Your People

Unit4 Human Capital Management (HCM)

- HR & Payroll
- Talent Management
 - Planning & People Analytics
 - Recruitment
 - Onboarding
 - Performance Management
 - Time & Attendance
 - Learning & Development

Unit4 People Experience Suite



Plan Your Future

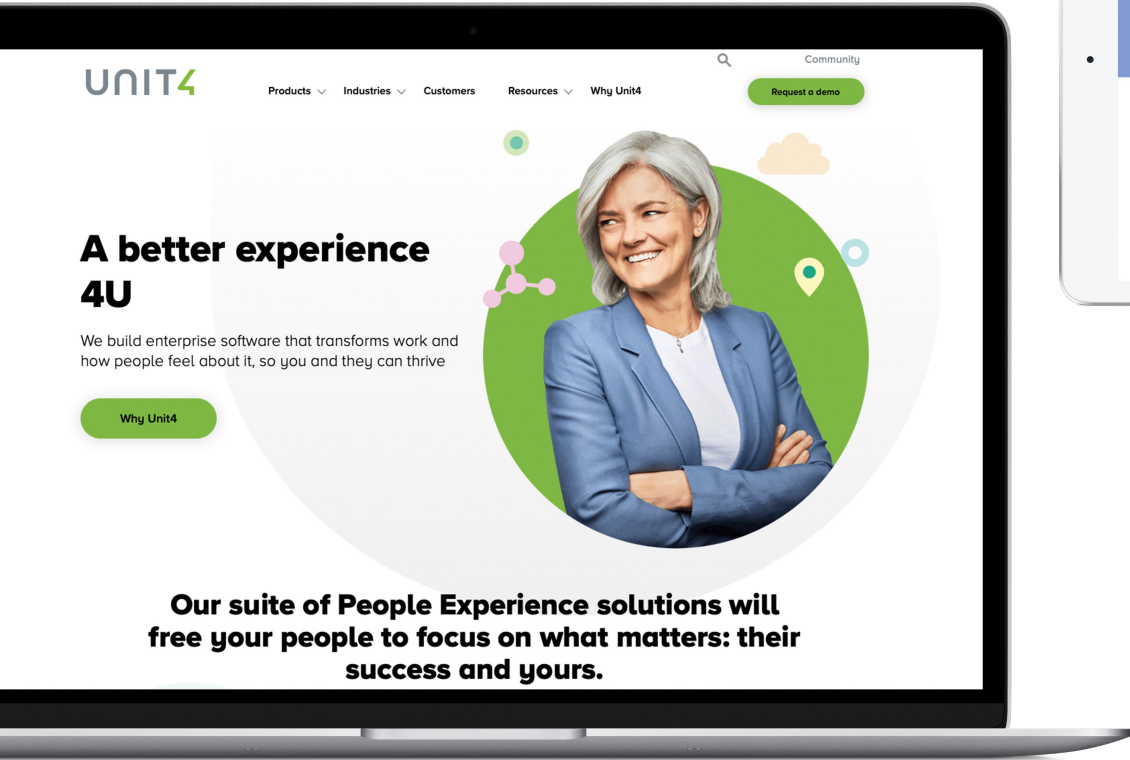
Unit4 Financial Planning & Analysis (FP&A)

- Corporate Performance Management
- Planning
- Budgeting
- Forecasting
- Financial Consolidation
- Reporting & Analytics

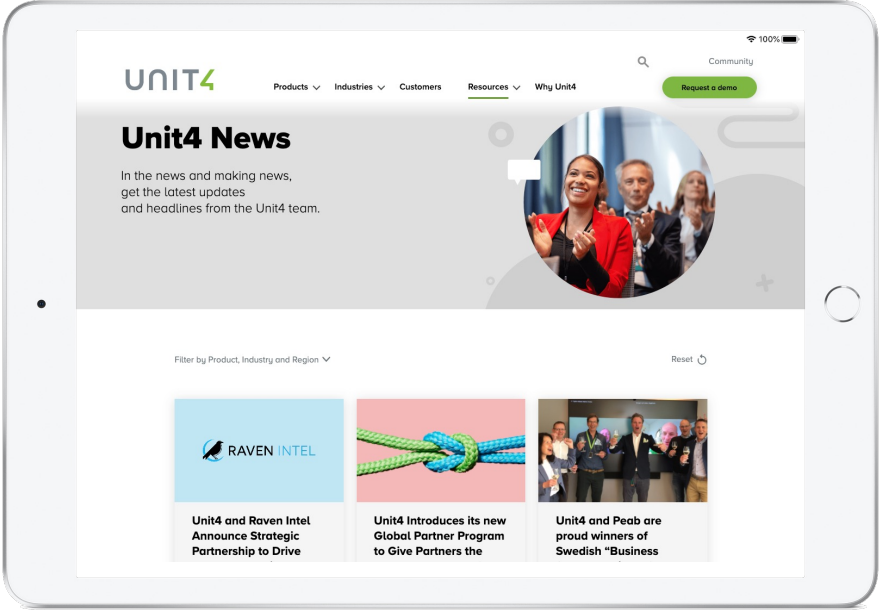
Unit4 People Experience Suite



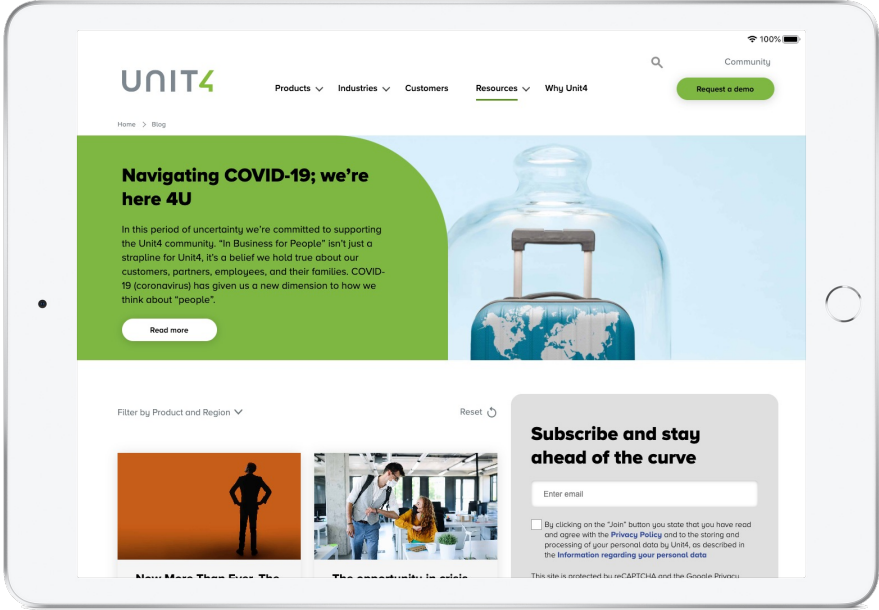
Website



Website



News Page

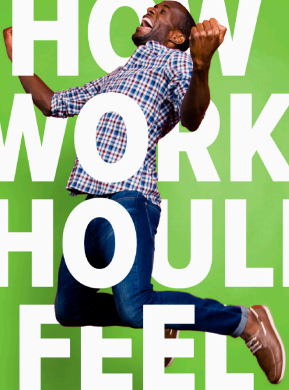


Blog Page

Print Ads

People Experience enterprise software

HOW WORK SHOULD FEEL 4U



People Experience software that is Ut quaestrum nitas
natur maxim sum que plabo. Nem eos ullacis aut ut volu-
rum fugitatur, optame optibusam, inum inihit incidunt isquae
acur autem essum corenis delenim pglia eu.
For more information visit unit4/solutions4u.com

UNIT4
In business for people

For people who are doing
good in the world every
day, we're here...

4U



People Experience software that is Ut quaestrum nitas
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UNIT4
In business for people

For professionals in
the business of serving
clients best, we're here...

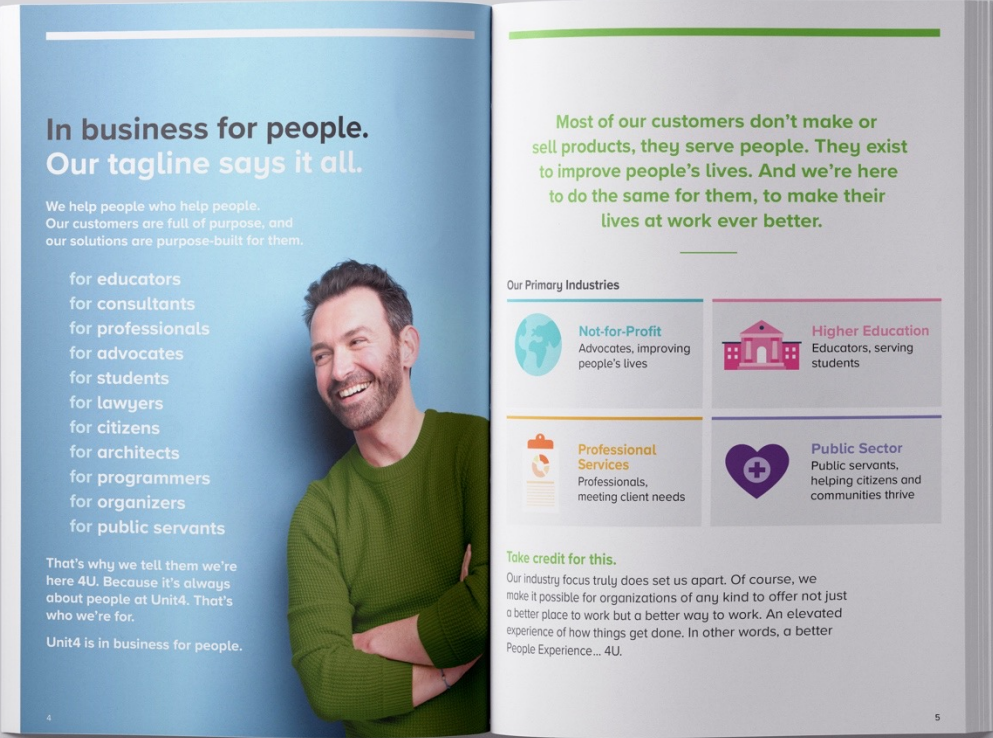
4U



People Experience software that is Ut quaestrum nitas
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For more information visit unit4/solutions4u.com

UNIT4
In business for people

Employee Brand Brochure



Corporate and Solution Overview: 2-pagers

Corporate Overview

Transforming the Work Experience



Unit4's next-generation enterprise software helps you deliver an exceptional People Experience for everyone your organization serves — from professionals and students to the public servants and not-for-profits doing good in the world.

People Experience is a discipline applied to software development that prioritizes human impact — making work more productive, efficient and inspiring.

Our cloud-based enterprise software is easier to use and manage, since we need people, not just tech experts, use it. You can manage projects and processes that deliver value across the service industry, quickly and flexibly, according to your specific needs.

And Unit4 has been supporting global clients for more than 30 years, so people can operate locally, nationally or internationally.

What This Means for You

You can transform work to be more meaningful through software that's self-driving and adaptive, intelligently automating administrative tasks. This elevates engagement and helps you attract and retain the best people.

But People Experience is not only about personal motivation — it's also about managers and staff working better together to improve organizational results. In all, helping people to focus on what matters improves how work feels, and means you can better serve your people and customers.

For more information, go to unit4.com



Corporate Overview

"Employees are feeling overloaded by their digital tools. They want to spend more time with their families and friends, and they want to focus on health, career and meaning at work."

Josh Barin
Global Industry Analyst and Founder of Josh Barin Academy



Technology to Set You Free

Unit4 is a modern, cloud-based enterprise software — automating and streamlining work with the most advanced technologies, including machine learning, AI, analytics and natural language digital assistants.

You can use these technologies to simplify and automate repetitive or non-value-added tasks, allowing people to focus on the meaningful, important work that they want to do and that makes a real difference in people's lives.

Value Across the Organization

People Experience is not a function of great HCM or great business. By bringing together focused, business and planning analytics software with HCM, Unit4 values the enterprise and better integrates the needs of the business, with the needs and interests of the people.

Work becomes more rewarding when the business is properly staffed and supported, with accurate data driving recognition and advancement.

A Platform for You

Our modern SaaS platform, the People Platform, is designed to drive maximum flexibility so people can work the way they're best for them. You can change, grow and configure services by connecting and creating extensions, integrations and applications with our solutions. We give people the flexibility and freedom to have what they need, how they need it.

Unit4 People Experience Suite

elevate your business

engage your people

plan your future

People Platform

connect and create

integrate

optimize

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For more information, go to unit4.com



Solution Overview

Unit4 Human Capital Management

Powering Today's People Experience



Raise your expectations of what Human Capital Management (HCM) can do for you and your people. Unit4's solutions are designed to deliver a superior People Experience across your organization.

Apply expertise where it's needed most. Delivering value from the start, our flexible, self-driving software is designed to work with you, so you can inspire and retain the talent that your customers have come to depend on.

For People Who Serve People

People working in higher education, public sector, not-for-profit, professional services and other people-based industries deserve a solution that can help them work the way they want.

Unit4 HCM blends our enterprise and analytics solutions to give you full visibility and actionable insights into your workforce while helping you to integrate with third-party ecosystem applications that you use every day — a necessity for today's HR teams.

"Failure to engage and retain top talent is the number-one issue of global CEOs and executives, before global competition and business model innovation."

The Conference Board

Our Unit4 Human Capital Management solution includes:

- HR and Payroll
- Talent Management
- Planning & People Analytics
- Recruitment
- Onboarding
- Performance Management
- Time & Attendance
- Learning & Development

For more information, go to unit4.com



Solution Overview

Unit4 HCM delivers more individualized control, surfaces insights for better decision-making, and accelerates time-to-value while delivering a better People Experience.



Engage and Enable

When you elevate People Experience, you support your culture, reduce attrition and improve organizational performance.

Our integrated talent enablement modules digitize and inform how your people grow, making conversations and coaching more focused and natural. We keep leaders and clients attuned to their performance and progress and make it easy for you to stress and enrich your culture on an ongoing basis. Enabling your people becomes both more efficient and more personal, and helps to drive better business performance.

Connect and Comply

We streamline and customize processes and repetitive tasks, supporting you in real time with a natural language digital assistant, for a better, more effective work experience.

So your people can apply their expertise where it makes the most impact — focused on the work they find most meaningful.

Transform Decision-Making

Better information makes for more effective people-based decisions, including deployment.

We help you put and apply data from your ERP and HCM systems with ease, giving you full visibility and actionable, combined insights into cost, value and performance across your organization.

Our analytics are purpose-built for people-centric organizations, to inform your every move as you recruit and grow. So you always have the right people doing the right things to propel your organization forward.

Customer Impact

"Since we introduced Unit4 Prevero, we've managed to save an average of 2 working days on the preparation and delivery of our HR reporting. In addition, we're able to process HR data for our business planning much faster, which saves us another 7 working days."

Dirk Schneider, DZ Finanzen & Rechnungswesen/Controlling
Deutsches Werk für die Industrie (DWI)

"Our employee churn has been reduced by 55% in one year!"

Patrick Colwell, Managing Partner/CEO, ABC Group

50%↓

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For more information, go to unit4.com



34 Sequel Campaign Strategy Case Studies | 02 23 2024

SEQUEL

Business Cards



Core Sales Pitch Deck

In Business 4U

Enterprise Solutions for a Better People Experience

Month XX, 2019

UNIT4



For People Who Help People

- Built for people in the service industries
- Help you work the way you want to work
- Manage projects/processes specific to your industry



What Our Solutions Can Do for You

Unit4 People Experience Suite



Sales Enablement Pitch Deck

ERPx for Your Business

Prepared for (Client/Prospect Name)

January 2023





Congrats.

Your job just changed.

Consultancy CFOs used to focus on controlling spend.

Now you have to worry about... **everything.**

Strategy. Operations. Social and financial compliance. Profitability. Growth. Execution.

Do your systems measure up?



71% of PEO firms view legacy applications as a primary barrier to driving innovation¹

1 ERPx for Your Business

UNIT4

ERPx from Unit4

We **harmonize** the three dimensions of excellence a consultancy business needs to succeed.

- Built on a **single data model** with a single user experience
- **Multi-tenant**
- **Integrated** for agility with low TCO



5 ERPx for Your Business

UNIT4

Solving 4U



17 ERPx for Your Business

We know you.

Our people come from your industry. We deliver leading-edge ERP systems to people-centric, project-based firms—working on every challenge you face.

We're with you all the way.



Industry Models guide our development, implementation, and evolution—and our Customer Success Team always has your back

21 ERPx for Your Business

Reduce reliance on Systems Integrators.

Minimize use of third parties post-implementation to change, integrate, update, and deliver ongoing bottom-line impact.

You get:

- User-driven change
- Low-code/no-code capability
- Low TCO



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UNIT4

Unit4 Post-launch Results

Post MVP SEO Results

ERP-based terms	→	Up 57%
Software-based terms	→	Up 28%
Solution-based terms	→	Up 65%
Financial-based terms	→	Up 27%
HR-based terms	→	Up 17%

**In 3 months after
brand launch and site
go-live...**

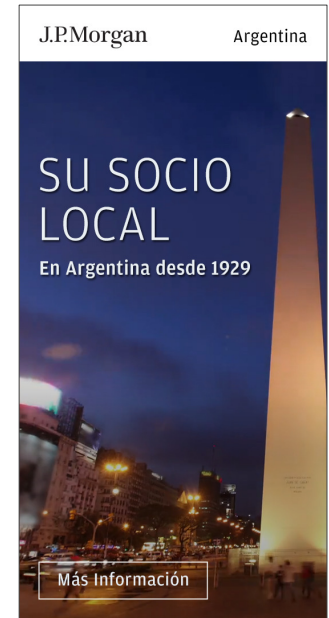
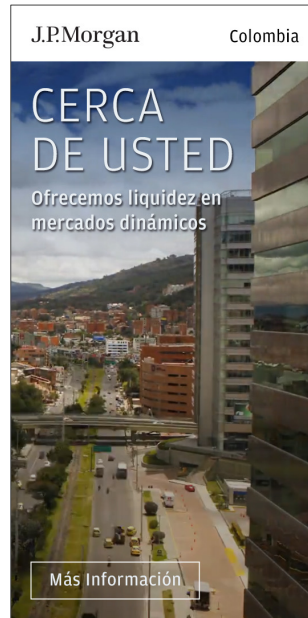
- Cloud bookings grew 87% YoY
- Total bookings increased by 55%
- Cloud subscription revenue grew by 14%

J.P. Morgan Corporate & Investment Bank

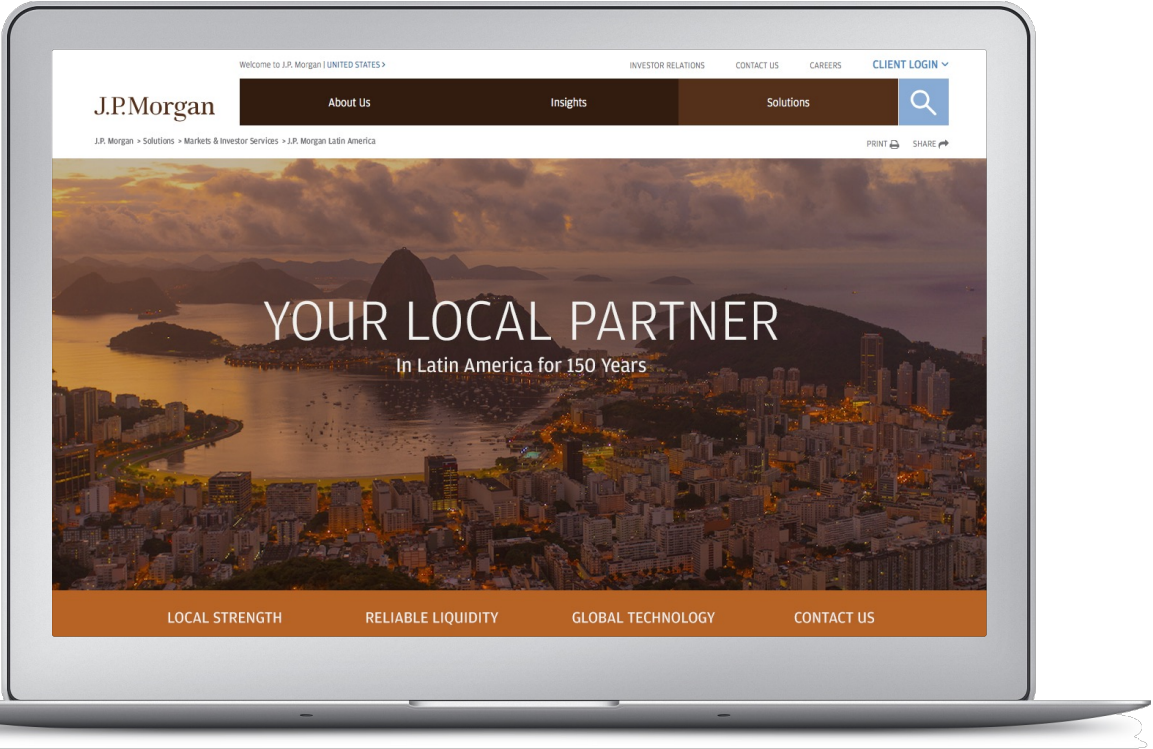
(Q:13) DIGITAL ADVERTISING

J.P. Morgan: LATAM Digital Awareness Campaign

Our user-centric approach allowed us to create a focused narrative with copy and visuals for multiple countries, in Spanish and Portuguese, within the Latin American market with localized ambient video backgrounds which provided an engaging message and visuals with accessible, localized call-to-action.



Campaign Landing Page (A/B Testing)



LATAM Awareness Campaign 2.0: Digital Advertising



The screenshot shows the Financial Times website. At the top, there is a J.P. Morgan advertisement with the text: "J.P.Morgan", "Tudo o que você precisa para operar", "Seu parceiro local na América Latina há mais de 150 anos.", and a button "Mais Informação". Below the ad is the Financial Times logo and navigation links: HOME, WORLD, US, COMPANIES, TECHNOLOGY, MARKETS, OPINION, WORK & CAREERS, LIFE & ARTS, HOW TO SPEND IT. There are also links for "Sign In" and "Subscribe". A secondary navigation bar includes "MARKETS", "fastFT", "Alphaville", "Markets Data", "Capital Markets", "Commodities", "Currencies", "Equities", "Fund Management", and "Trading". Below this is a "Subscribe to the FT" button and a section for "Markets" with a "+ Add to myFT" button. The main content area features a "Global Market Overview" section with the headline "US stocks jump as North America trade deal" and a photo of a woman speaking into a microphone. To the right, there is a "Recommended" section with flags of Turkey, South Africa, Brazil, and Mexico.



The image displays three J.P. Morgan advertisements for LATAM awareness. The top ad features a night scene of a fountain with the text: "J.P.Morgan", "Lo que necesitas para crecer", "Tu socio local en América Latina por más de 150 años", and a button "Más Información". The middle ad shows a tunnel of light with the text: "J.P.Morgan", "Tudo o que você precisa para operar", "Seu parceiro local na América Latina há mais de 150 anos.", and a button "Mais Informação". The bottom ad depicts a modern building at night with the text: "J.P.Morgan", "Lo que necesitas para crecer", "Tu socio local en Latinoamérica por más de 150 años", and a button "Más Información".