



BUILT TO CLOSE.

Healthcare & Life Sciences Branding and
Lead Generation Pre-Proposal



November 5, 2020

CURRENT SITUATION

FTI Consulting (FTI) is a leading global advisory firm dedicated to helping organizations manage change, mitigate risk and resolve disputes: financial, legal, operational, political, regulatory, reputational, and transactional.

FTI's Healthcare & Life Sciences division is poised for significant growth in 2021 and beyond, but has identified a number of sales and marketing challenges that could impede its ability to capture opportunity.

1

Clients under-utilize FTI and are not aware of expertise within the healthcare services division.

- a. FTI would like to repackage all healthcare services under one brand: Healthcare Compliance Solutions.
- b. FTI is implement Salesforce to improve pipeline, current project, and past client visibility among its consultants. It is looking for a marketing partner to help consultants maintain utilization, search for upsell opportunity, run reports, and coordinate with marketing team on automations and campaigns.

2

As much FTI consultant time as possible should be spent on client work versus early sales stages. It does not make sense for them to be involved in early sales stages such as source, nurture, and qualify. FTI consultants should be brought in after the "marketing qualified" stage to close.

3

There is simply lack of resources to run an efficient marketing and business development program for a high-growth healthcare B2B organization. Content to fuel this program likely includes content such as consultant thought leadership, speaking engagements, awards, research, etc -- currently untapped as lead generation and nurture tools.

ABOUT ROOT3

Founded in 2016 by B2B healthcare business development expert Scott Christiansen, Root3 was built to give high-growth, high-value healthcare organizations access to the people, process, and technology that will help them capture opportunity and drive long-term predictable and profitable growth.

This proposal will demonstrate capabilities and provide a roadmap to:

- 1** REPACKAGE HEALTHCARE DIVISION AS HEALTHCARE COMPLIANCE SOLUTIONS
- 2** DEVELOP & EXECUTE A STRATEGY TO DRIVE CUSTOMER UTILIZATION TO MULTIPLE CONSULTANTS
- 3** IMPLEMENT MARKETING AND BUSINESS DEVELOPMENT BEST PRACTICES THAT WILL BEST UTILIZE CONSULTANT TIME AND KEEP THEM FOCUSED ON BILLABLE WORK

THE ROOT3 VALUE PROPOSITION

NICHE AUDIENCE SPECIALISTS

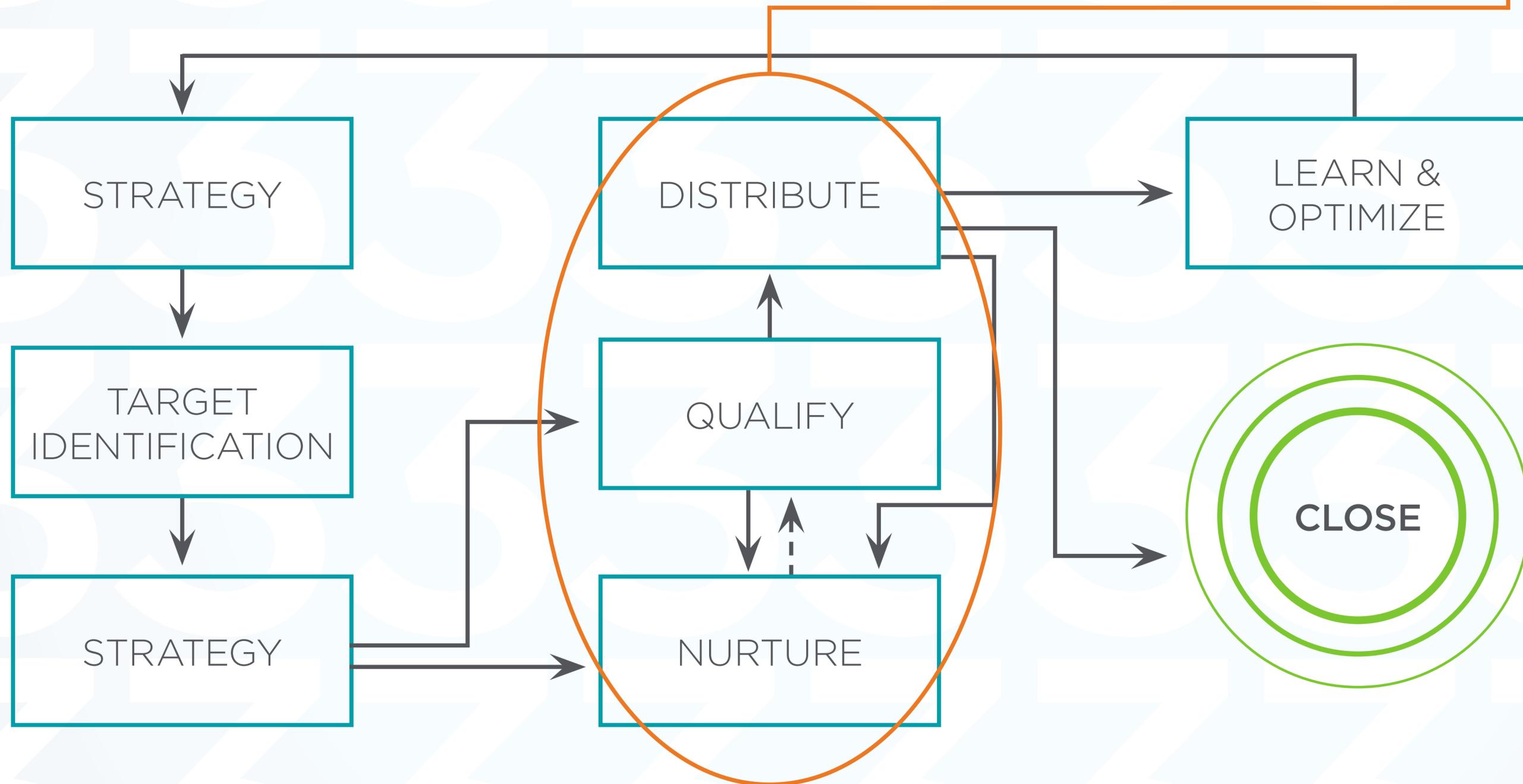


OUR CLIENTS...

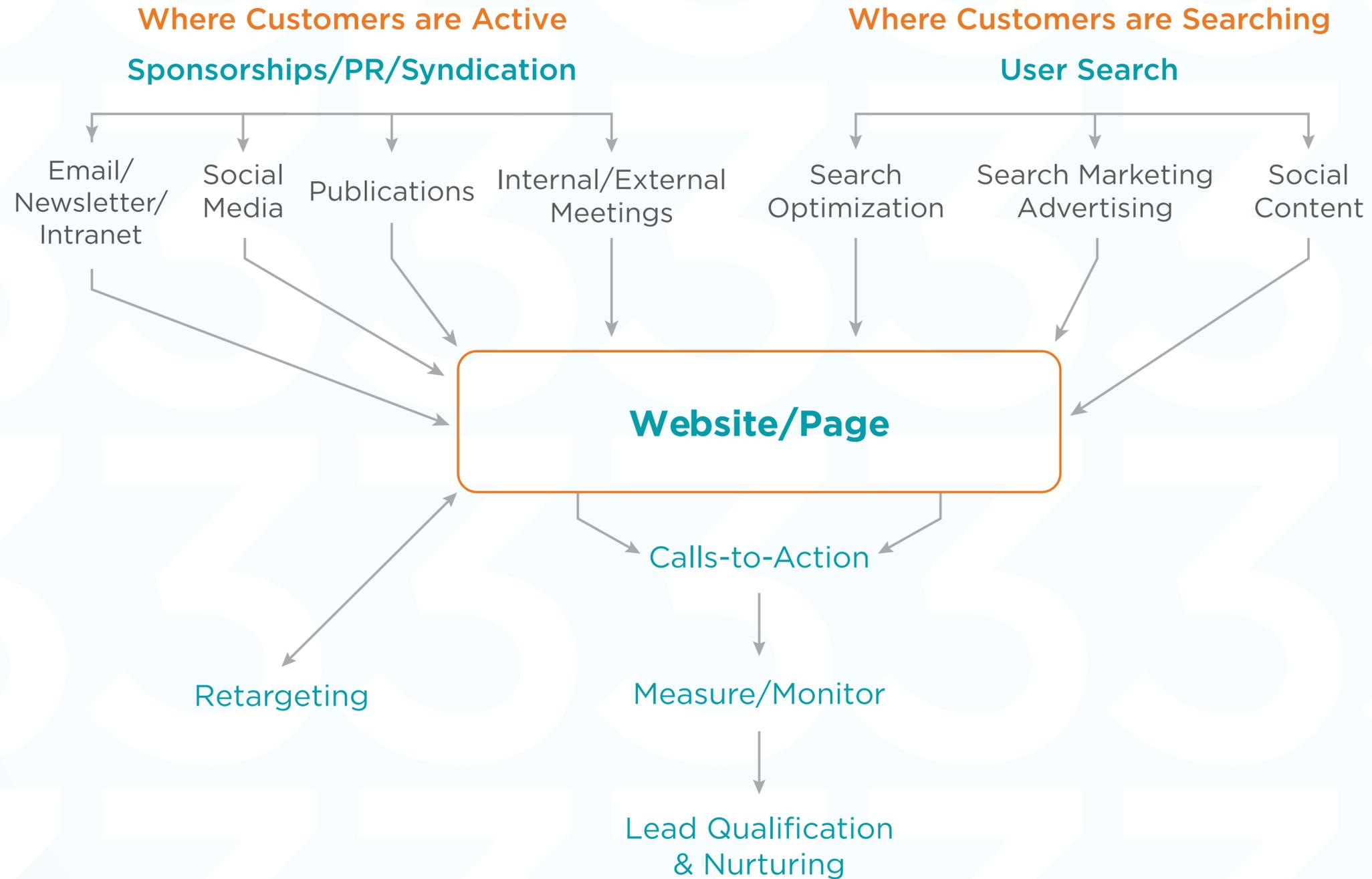
- Have identified a big need or opportunity
- Sell complicated, and/or expensive products or services
- To a small number of decision makers
- Who are hard to access and influence

MARKETING EFFICIENCY & SALES INTEGRATION SPECIALISTS

Our process, technology, and automations fix where 80% of marketing value is lost



MICRO-TARGET/MULTI-CHANNEL APPROACH





“Companies that excel at lead nurturing generate 50% more sales-ready leads at a 33% lower cost.”

MARKETO



EXECUTIONAL SERVICES

Access to a full sales and marketing engine.

MARKETING

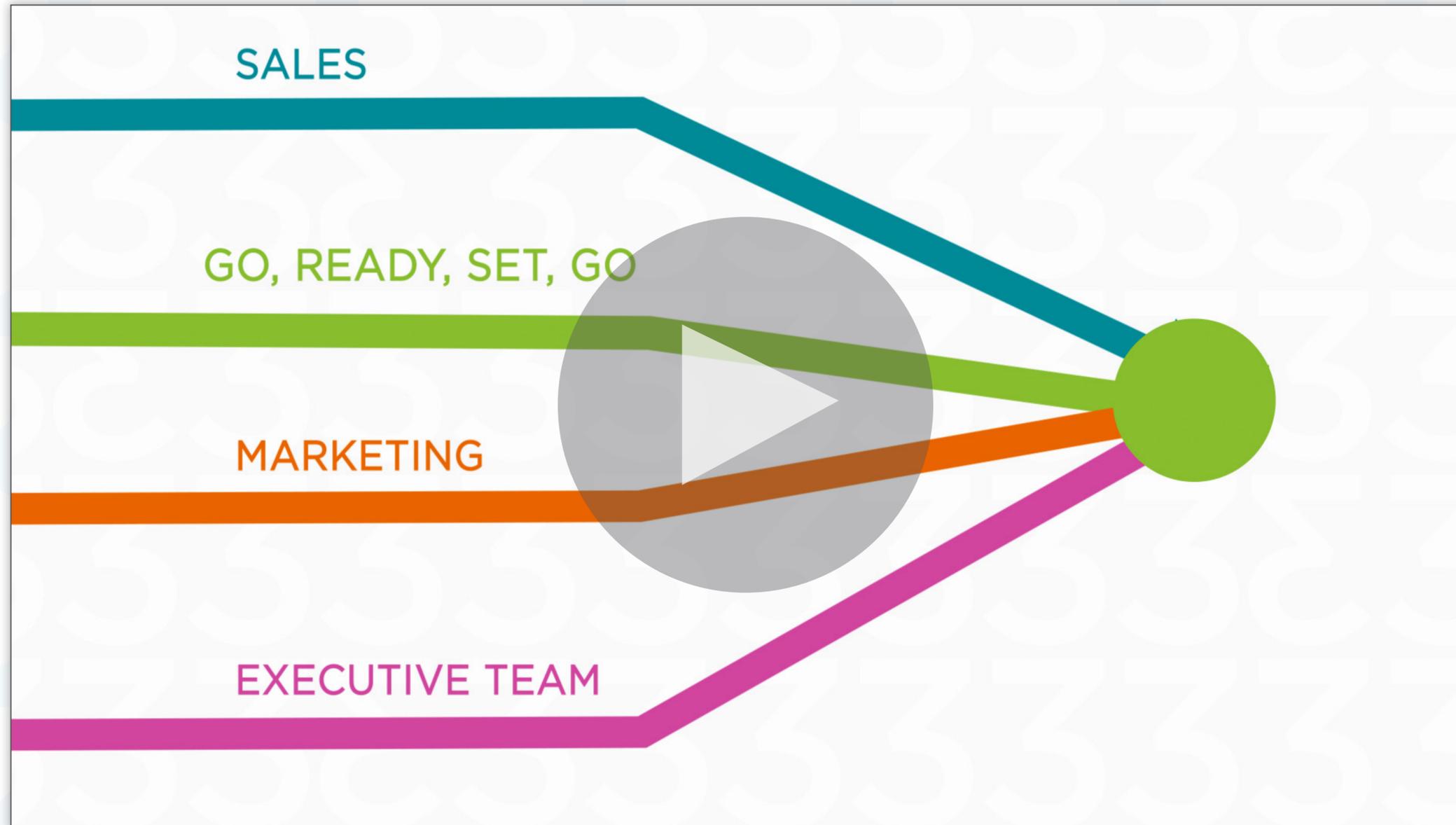
- » Research
- » Inbound & Outbound
- » Content & Social
- » SEO/SEA
- » Marketing & Email Automation
- » Web Development & Management
- » Lead Generation & CRO
- » Public & Media Relations
- » Events & Speaking Engagements
- » Design/Brand Development
- » Video/Photography

BD/SALES

- » Email Cadences
- » Phone Sales Cadences
- » Lead Qualification Calling
- » Appointment Setting
- » Marketing CRM Management
- » Sales CRM Management
- » Database Management
- » Sales Digital Transformation
- » Engagement, Scoring, & Prioritization

GO. READY, SET, GO.

We have the ability to immediately begin marketing activity and deliver increased sales activity while we work on foundational needs that require time such as rebranding, CRM configuration, etc.



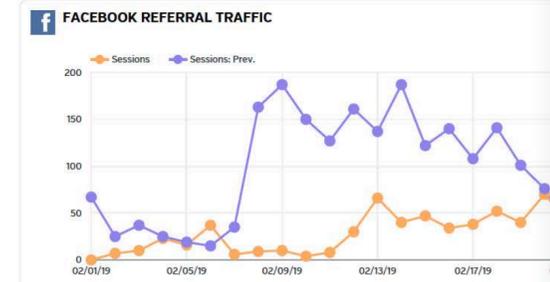
REPORTING & OPTIMIZATION

We measure everything to optimize and prove an ongoing ROI.

Facebook - Summary

02/01/2019 - 02/28/2019 [compared to 01/01/2019 - 01/31/2019]

HEADER 1	METRIC 1	METRIC 2	METRIC 3
Five	42		
Four	49		
Three	66		
Two	96	66	90
One	23	78	55



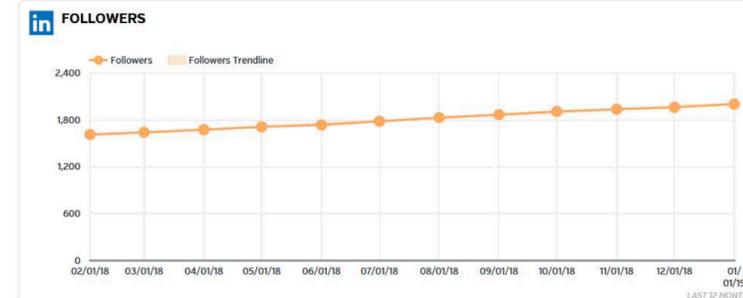
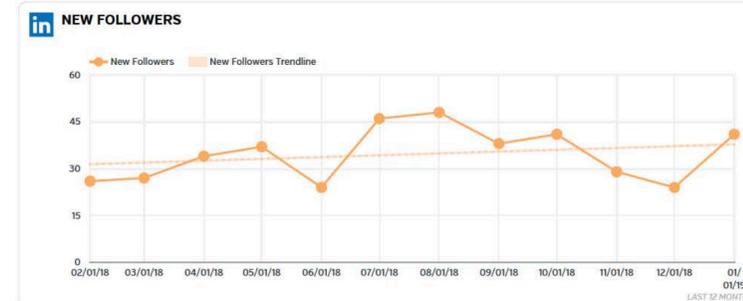
LIKE SOURCES
Restored Likes From Reactivated Accounts
Your Page
Search
News Feed
Page Suggestions
Other

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LinkedIn - Company Summary

02/01/2019 - 02/28/2019 [compared to 01/01/2019 - 01/31/2019]

FOLLOWERS
2,156



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Web Traffic Summary MOM

02/01/2019 - 02/28/2019 [compared to 01/01/2019 - 01/31/2019]

ALL TRAFFIC NEW USERS
125,307
PREVIOUS: 83,145
▲50.71%

ALL TRAFFIC PAGE VIEWS
287,160
PREVIOUS: 178,424
▲60.94%

NEW USERS	PAGE VIEWS	PAGES / SESSION	BOUNCE RATE
+84.15%	+168.94%	+1.18%	+3.18%
86,914 vs 47,198	187,876 vs 69,858	1.13 vs 1.12	91.19% vs 94.18%
+8.55%	+8.17%	+8.57%	+4.66%
21,802 vs 20,085	57,196 vs 62,288	1.77 vs 1.94	71.94% vs 68.73%
+6.51%	+19.95%	+7.90%	+3.23%
8,671 vs 8,085	15,687 vs 19,596	1.41 vs 1.53	85.55% vs 82.88%
+53.34%	+22.35%	+13.20%	+7.95%
5,508 vs 3,592	11,774 vs 9,623	1.66 vs 1.91	70.21% vs 65.04%
+6.73%	+6.66%	+2.91%	+10.11%
952 vs 892	12,310 vs 13,188	2.56 vs 2.64	49.18% vs 44.66%
+48.08%	+54.06%	+7.45%	+2.65%
1,000 vs 1,926	1,540 vs 3,352	1.25 vs 1.35	88.51% vs 86.22%
+159.89%	+49.71%	+32.63%	+35.55%
160 vs 177	777 vs 519	1.34 vs 1.99	85.69% vs 63.22%

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AD GROUP	KEYWORD	IMPRESSIONS	CLICKS	CTR	COST	CONVERSIONS
Medical University	+medical university	79,655	886	1.11%	\$16,977.68	25
Caribbean Medical Schools	caribbean medical schools	18,433	936	5.08%	\$15,145.14	29
Webinar	american medical college	49,544	442	0.89%	\$8,317.17	7
Medical Schools	med school	35,652	266	0.75%	\$5,687.80	7
Medical Schools	+med school	31,135	299	0.96%	\$4,432.41	5
Medical Schools	+medical school	38,780	334	0.86%	\$4,248.86	11
Medical Schools	medical schools	29,076	209	0.72%	\$3,733.00	5
Medical Schools	med school	8,621	119	1.38%	\$3,374.18	2
International Medical School	international medical school	8,653	227	2.62%	\$3,155.39	8
Medical Schools	medical school	25,301	181	0.72%	\$2,672.52	6
Caribbean Med Schools	+caribbean +med +schools	1,155	43	3.72%	\$2,540.80	3
Caribbean Medical Schools	caribbean medical schools	2,752	81	2.94%	\$2,533.76	5
International Medical School	international medical school	6,762	198	2.93%	\$2,489.87	5
Medical College	+medical +college	9,866	228	2.31%	\$1,965.28	2
Medical College	+med +college	8,778	193	2.20%	\$1,822.55	3
MCAT Test	+mcat +test	7,624	286	3.75%	\$1,739.04	4
Secondary Keywords	med schools that don't require mcat	546	36	6.59%	\$1,698.94	3
Minority Scholarships	minority scholarship	8,735	314	3.59%	\$1,535.77	21
Secondary Keywords	+caribbean +medical programs	935	41	4.39%	\$1,450.58	3
HBCU Students	+medical +school	18,793	222	1.18%	\$1,442.86	59
Webinar	medical school overseas	3,991	67	1.68%	\$1,441.38	3
AUA	aua	6,554	208	3.17%	\$1,382.41	--
American University - Antigua	american university of antigua	1,812	276	15.23%	\$1,234.89	6
Caribbean Medical Schools	best caribbean medical schools	1,104	49	4.44%	\$1,182.05	6
Caribbean Medical Schools	caribbean medical schools	1,289	40	3.10%	\$1,122.15	2
MCAT Score	+mcat +scores	8,273	207	2.50%	\$1,069.91	3
Medical Schools	school of medicine	7,734	101	1.31%	\$1,041.60	1
MCAT Exam Prep	mcat prep	9,414	146	1.55%	\$980.37	4
Secondary Keywords	+medical school +no +mcat	813	35	4.31%	\$966.52	1

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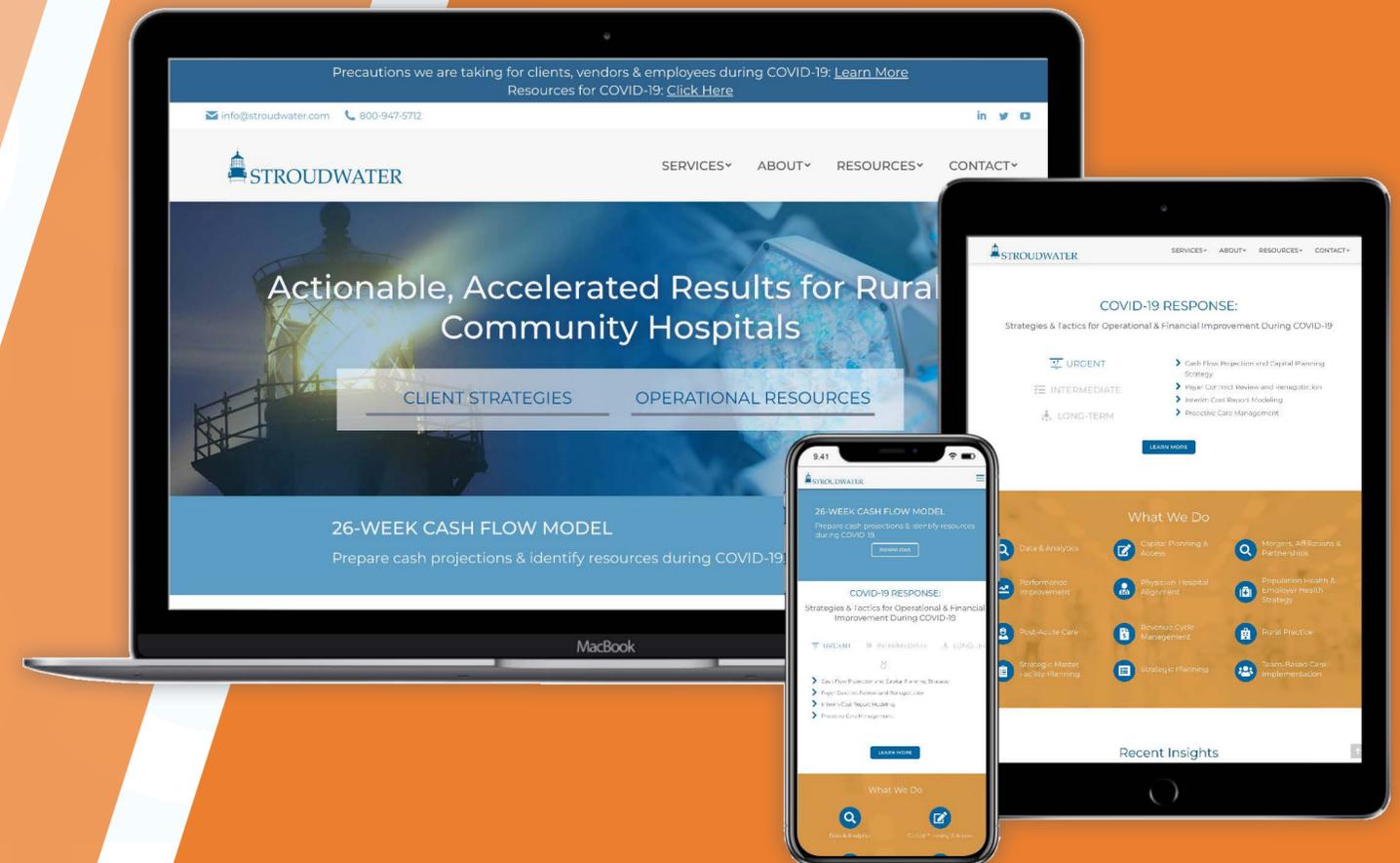
CASE STUDY: IMPROVE CLIENT UTILIZATION & LEAD GENERATION

PROBLEM

- » Consultants did not have a system to communicate or cross-sell services
- » No shared database for visibility and accountability
- » Consultants ignored marketing while on projects which often resulted in empty pipelines at project completion
- » Consultants regularly speak and are published but content was not being leveraged for business development

RESULTS

- » Refresh website look/message/UX
- » Configure and train consultants on CRM
- » Scrub and segment database
- » Reengage audience around total firm expertise/value
- » More than 1,000 new marketing qualified leads were developed in first six months
- » First two weeks of calling resulted in 9 email appointments and 9 calling appointments



“The Stroudwater team is like many consulting firms: we prioritize client work over business development. Root3 brought us into the 21st century with advanced marketing best practices. And they make it easy - using their services, our consultants had new appointments on their calendar with clients who eagerly raised their hands to speak to them.”

JEFF SOMMER
MANAGING DIRECTOR

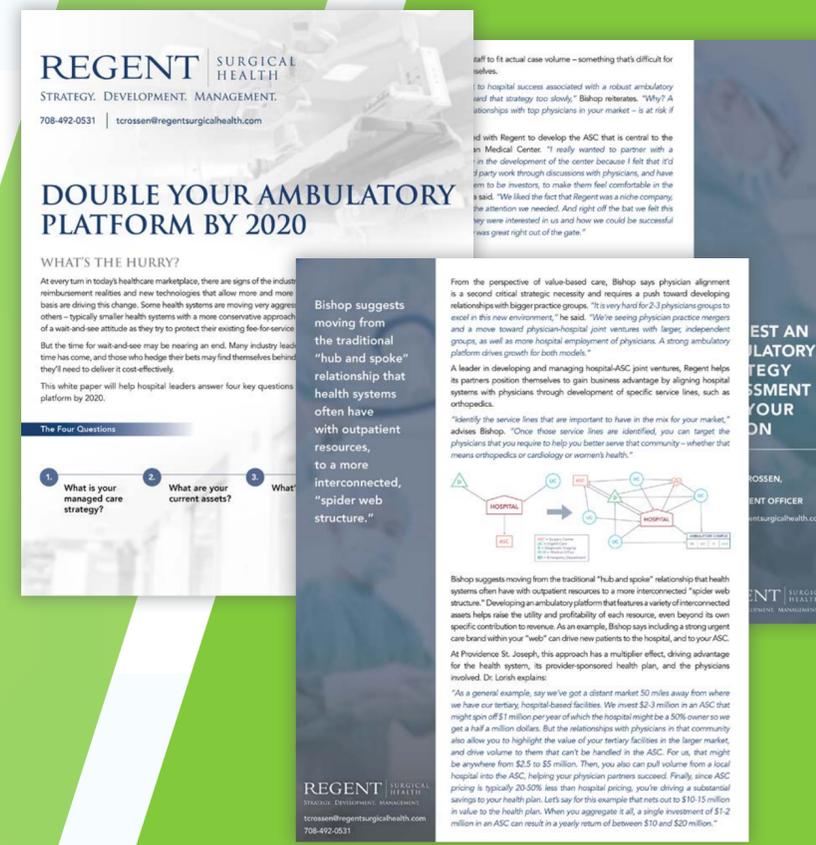
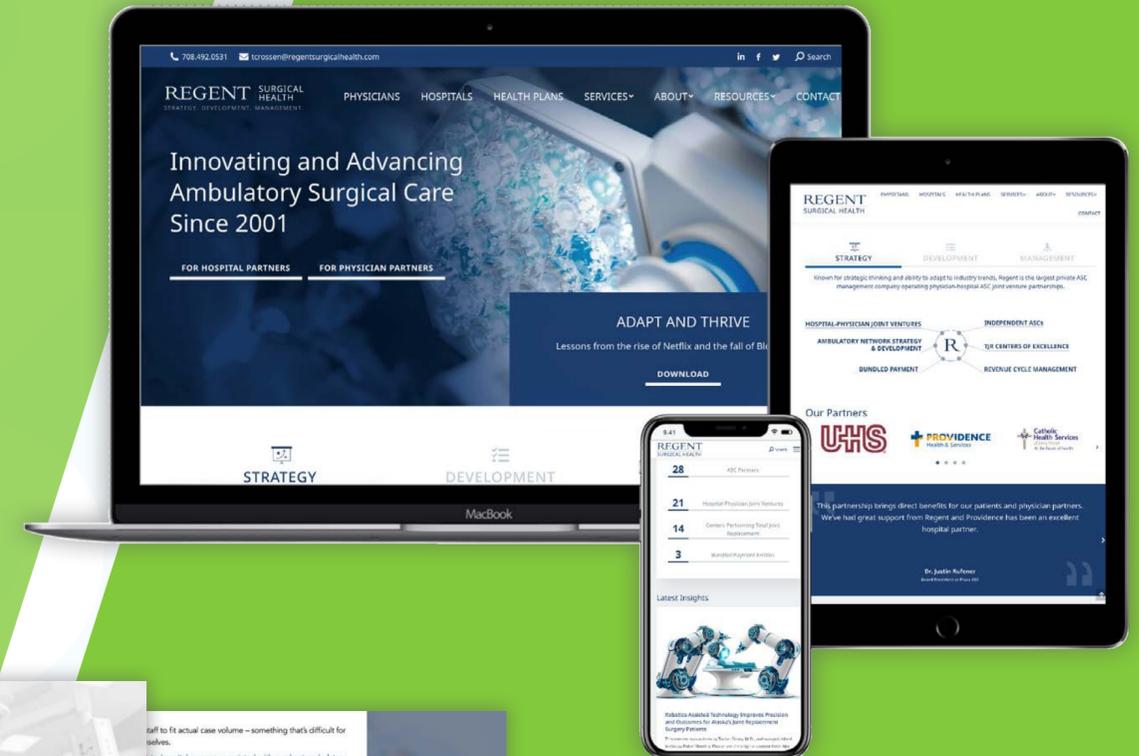
CASE STUDY: REBRANDING MARKET STRATEGY & EXECUTION

PROBLEM

- » The ASC marketplace changes quickly for management companies
- » Regent is known for ability to adapt and evolve from turnaround specialists, to hospital/physician JV specialists, to hospital ambulatory strategists

RESULTS

- » Developed targeted list of hospital ambulatory strategists
- » White paper: “Double Ambulatory Strategy by 2020”
- » 1,400 downloads put into nurture and calling campaign
- » Average deal size grew from 1 center to 3-14 centers



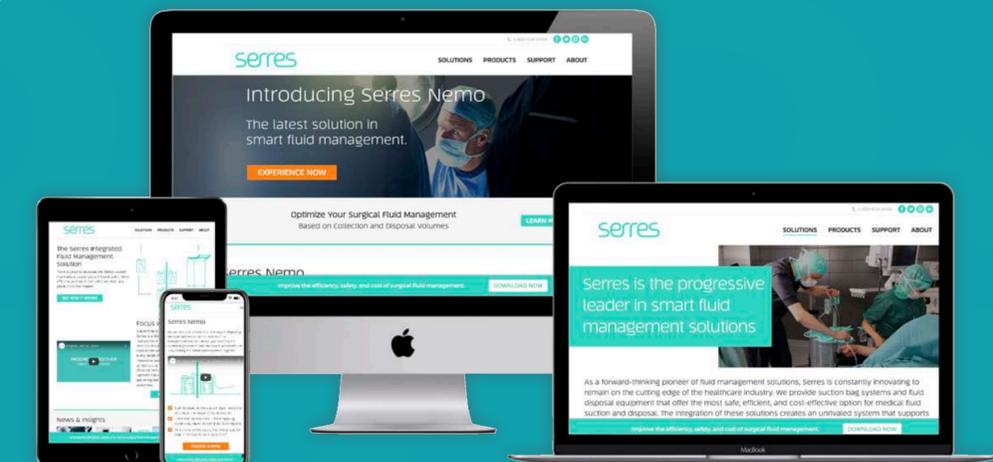
CASE STUDY: MARKET STRATEGY & EXECUTION

PROBLEM

- » European medical equipment manufacturer Serres is #1 in the world in the surgical fluid space, but unknown in the US.
- » Serres sales messaging fell flat on US audience that only wanted to know what they had achieved here.
- » Sales messaging was not differentiated by surgical facilities and hospitals.
- » Serres did not understand how to navigate the multiple decision maker reality of US health systems

RESULTS

- » Root3 conducted research and developed a go-to-market strategy in the US that led to the company's most successful new market launch.
- » 30% of leads turned to sales qualified leads in first 60 days and included Mayo Clinic.



“This launch was by far the most productive and beneficial I’ve been a part of in all my years of device sales. The quality of conversations and opportunities was exciting to see and I’m looking forward to seeing them develop. Also, and most importantly, the Root3 team is amazing. They absolutely killed it with everything they did to have us prepared for launch. Thank you all for your support and helping us stand out in the market.”

JASON PFEIFFER
US SALES DIRECTOR, SERRES

CLIENTS

MSO



OEM



TECHNOLOGY



PRIVATE EQUITY



THE NEXT 90 DAYS

REPOSITIONING

- » Articulate the combined value of comprehensive compliance services for:
 - › Healthcare Businesses
 - › Healthcare Attorneys
 - › Private Equity
- » Update messaging across platforms

TECHNOLOGY

- » Marketing CRM set-up and integration with Sales Force
- » Database segmentation
 - › Current/Former Clients by Service(s)
 - › Lost/Closed Clients
 - › Nurture Leads
 - › Targets by Persona (healthcare, legal, PE)
- » Media list development

CONTENT/ DISTRIBUTION

- » Inventory existing thought leadership / proof-of-performance content
- » Document upcoming thought leadership / proof-of-performance content
- » Optimize distribution by platform (web/social/PR/email)

LEAD GENERATION

- » Reengage database with new positioning: Value of combined services
 - › Current/former clients
 - › Current open/stalled temporary pipeline
 - › Influencers
- » Lead gen strategy around speaking engagements
- » Develop campaign around priority system list

2021 STRATEGIC PLAN DEVELOPMENT

- » Goals
- » Tactics
- » Timelines

BUDGET

- » Foundational Projects: We need to define the scope of the two projects identified to better propose a budget
 - › Technology setup and integration **\$TBD**
 - › Repositioning **\$TBD**
- » Ongoing lead-gen program: Our fees are generally similar to the cost of hiring one or two mid-level FTEs and include access to our full team of marketing and sales experts including lead qualification calling and Salesforce administration.



root3marketing.com

773.799.8200