

WELCOME TO

ELEMENT



STRATEGY THAT CONNECTS. CAMPAIGNS THAT EMPOWER PROFESSIONALS.

The National Association of Tax Professionals (NATP) has built a trusted reputation as the approachable, go-to resource for tax preparers nationwide. To extend that position and increase member engagement, NATP is now poised to strengthen its presence through a credentialing program sub-brand launch, a refreshed website experience, and ongoing promotional campaigns.

Element understands that the success of these initiatives relies on **more than executing individual tactics**. It **requires a cohesive, interconnected strategy** that ensures every effort, from digital advertising to web experience to campaign messaging, works together to advance NATP's brand and membership goals. That's where our **Total Brand Chemistry™** philosophy comes in.

Total Brand Chemistry™ is not about rebranding. You know who you are. It's about the alignment of your **strategy, creative, and execution into one integrated framework** leveraging your existing brand to reach the right audience at the right time with the right message to get the reaction you want.

By applying this process, NATP will be able to:

- Launch its credentialing program with a clear, differentiated identity that builds long-term equity.
- Elevate the association's new website into a central hub for member value, advocacy, and community.
- Deploy campaigns that reinforce one another rather than operate in silos, maximizing both reach and relevance.

Our team brings a broad range of industry experience, including associations, giving us the ability to apply learnings from multiple sectors while tailoring them to NATP's unique needs. That cross-industry perspective allows us to uncover opportunities to better engage tax professionals, support NATP's mission, and deliver strategies that are both creative and practical for your members.

THE COST OF UNCLEAR MARKETING DIRECTION

When marketing efforts aren't aligned with organizational goals, the result is often wasted budget chasing ideas instead of driving results rooted in strategy.

A lack of strategic direction can also create inconsistent messaging, confusing your audience and weakening brand trust. Internally, teams may feel uncertain about what to execute or prioritize, leading to frustration and slower progress.

The bottom line: when strategy is missing, everything can suffer.

- ✓ Wasted Budget
- ✓ Inconsistent Messaging
- ✓ Lack of Direction
- ✓ Slower Growth





ELEMENT BRINGS STRATEGIC VISION

INTEGRATED MARKETING ALIGNS YOUR STRATEGY, MESSAGING,
CREATIVE AND MEDIA AROUND ONE CENTRAL PLAN.

Total Brand Chemistry

OUR FORMULA FOR SUCCESS

PARTNERSHIP THAT PERFORMS

CREATIVE THAT CONNECTS

STRATEGY THAT STICKS

INSIGHTS THAT INSPIRE

REAL RELATIONSHIPS

Let's get one thing straight—we're not just another vendor on your list. We're your inside-outsider. Your strategic sidekick. Your creative co-pilot.

If you're looking for yes-people or cookie-cutter solutions, we're not your agency. But if you want a team that questions everything, obsesses over impact, and fights for ideas that actually move the needle, then we're already speaking your language.



E L E M E N T



INTEGRITY

PASSION



PARTNERSHIP



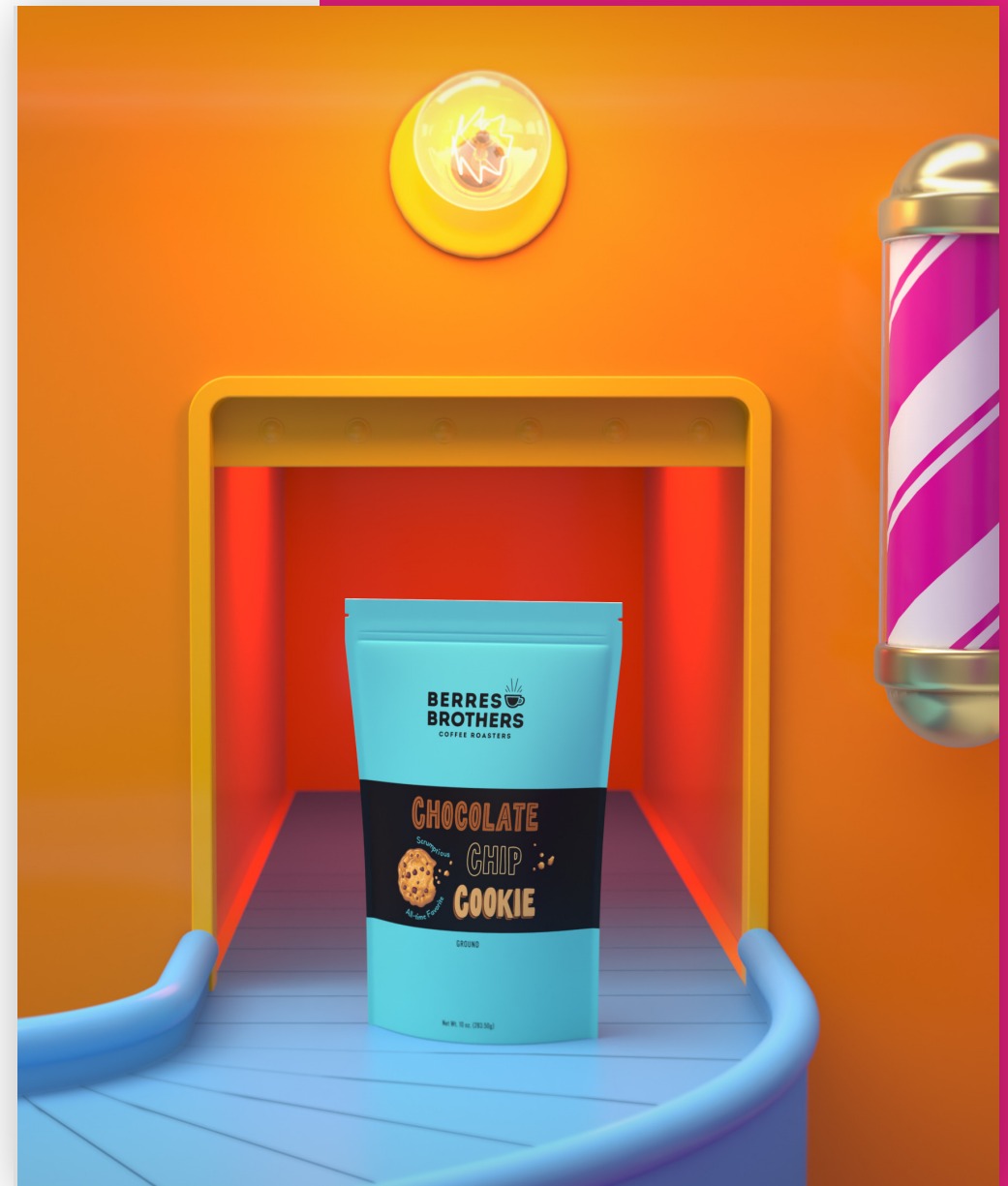
AUTHENTICITY

CREATIVE THAT CONNECTS

We don't chase attention for attention's sake. We build ideas with purpose. We shape every concept to align with your brand's goals and your audience's reality.

Our "Know, Think, Feel" filter ensures your message doesn't just land, it leaves a mark. We make people know who you are, think about what you stand for, and feel something that resonates.

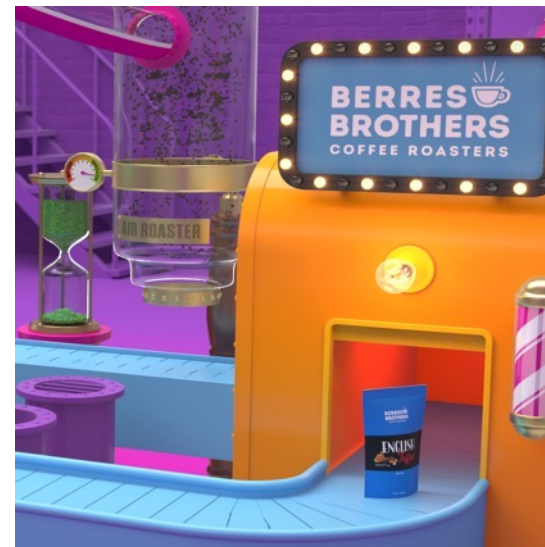
Because we're not here to make things pretty. We're here to create bold, emotional, strategically sharp campaigns that don't just stop the scroll—they move the brand.



STRATEGY THAT STICKS

Our integrated approach unifies every channel so your brand shows up with clarity and consistency. Every campaign. Every touchpoint. Every word. Aligned and intentional to drive measurable impact and lasting loyalty.

Strategy doesn't just connect your marketing—it directs it, ensuring the right message hits the right audience at the right time. It's not about being everywhere—it's about being exactly where you need to be to turn attention into action and growth.





INSIGHTS THAT INSPIRE

At our core, we're not just data-driven—we're insight-driven. Because numbers alone are lifeless until they're given meaning, context, and a connection back to strategy. We go beyond dashboards and metrics to uncover the stories and human truths behind the data.

It's these insights that ignite bold ideas, guide smarter decisions, and inspire creative solutions that resonate with real people. Data informs, but insights inspire—and that's where the magic happens.

ELEMENT BY THE NUMBERS

- 1 official mascot, Canuck the Moose, headquartered in De Pere, Wisconsin
- 8.2 years, the average tenure of our top 10 accounts, this is over double the industry average
- 21+ years as a full-service marketing agency
- 45 full-time creative problem-solvers



65% National
20% Regional
15% Local



60% B2B
40% B2C



BRANDS WE WORK WITH



MEMBERSHIP & ASSOCIATION EXPERIENCE

Element brings experience working with membership-based organizations and associations, PLUS we apply a cross-industry perspective that ensures our strategies are never one-size-fits-all. While we have not yet partnered directly with NATP, our approach focuses on understanding your members, their needs, and the dynamics of membership engagement. By applying insights and learnings from a range of industries, we create strategies that resonate, encourage participation, and deliver meaningful, measurable results for your members.



OUR APPROACH

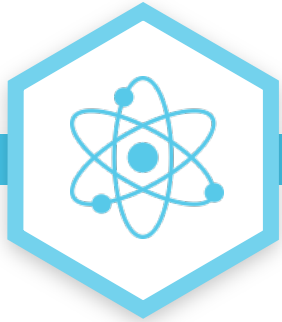
BUILDING AWARENESS, ENGAGEMENT, AND MEMBER VALUE
ACROSS NATP'S KEY INITIATIVES



BRAND ALIGNMENT IS MORE IMPORTANT THAN EVER

Brand alignment is more important than ever. Authentic relationships are pivotal for modern organizations, as those that earn and sustain trust are positioned for growth and lasting success. For NATP, this means understanding the unique needs and priorities of tax professionals and delivering messages that support their professional goals. By mapping the member journey and creating meaningful, timely experiences, we ensure communications not only build trust but also reinforce NATP's mission and vision. This approach positions NATP to connect strategically with its audience, strengthening engagement, loyalty, and the value members see in the organization.

ALIGNMENT CREATED BY INTEGRATED MARKETING



ONE STRATEGY

Ensures your marketing efforts are driven by a single strategy and defined business goals



UNIFIED VOICE

Strengthens your brand's message and unifies your brand voice across all marketing channels



CONSISTENCY

Builds connections and promotes consistency at every touch point



CLARITY

Improves the data analysis and transparency of marketing activities



RESULTS

Maximizes your reach, impressions, and your overall ROI on your marketing spend



PART 1: STRATEGY & DISCOVERY PHASE

Your RFP gives us a good starting point, but it doesn't provide enough detail to define the best strategy, timing, or execution. Rather than giving line-item estimates, we take a phased approach rooted in true partnership. First, we focus on strategy—aligning goals, analyzing opportunities, and mapping the best path forward. Then, we move into execution, implementing the plan with clarity and focus. While exact deliverables may feel a bit uncertain at the start, it provides deeper clarity as we progress, smarter prioritization, and stronger, measurable results.

STEP ONE:

GETTING TO KNOW YOU

In the first 30 days, we'll get to know NATP like it's our new favorite Netflix series. We'll meet with key team members to explore your brand's DNA, your mission to empower tax professionals, your audience's goals and challenges, and your long-term vision so that we can become **a true extension of your team.**

Then, we'll run a comprehensive audit of your communications, member touchpoints, and digital presence. After digging in and uncovering key insights, we'll surface the opportunities that will guide a strategy aligned to NATP's mission, resonate with your members, and strengthen engagement across the board.

(Spoiler alert: it's where the magic happens.)



STEP TWO:

RESEARCH

INSIGHTS TO MAXIMIZE YOUR RETURNS

We'll dive deep into understanding the landscape by conducting thorough market research that examines **o strategies, industry trends, and customer behavior.**

- ✓ Align the brand message with with your persona's needs & motivations
- ✓ Deliver the right message in the right place and at the right time
- ✓ Ensure consistency of voice and message throughout their experience/buyer's journey



STEP THREE:

STRATEGY DEVELOPMENT

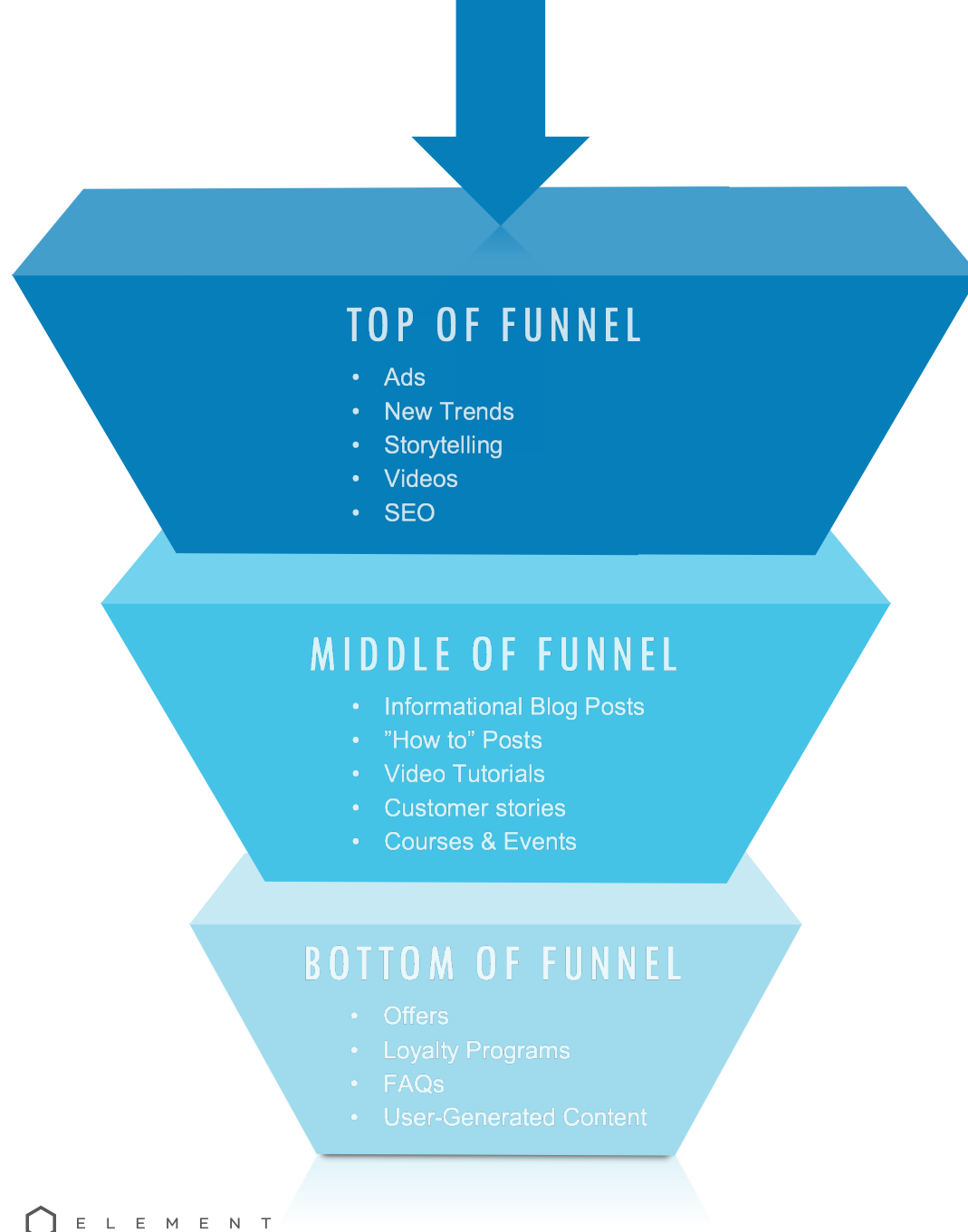
ALIGNING MEMBERSHIP GOALS AND MARKETING

Our team of strategic marketers have developed a multi-step approach to develop customized integrated marketing strategies that build authentic relationships. By deeply understanding the buyer journey and crafting impactful experiences across all marketing channels, we position your brand to earn and sustain trust, which is crucial for driving growth and achieving long-term success.

This is where we align your specific RFP tactic requests with strategy to ensure the best results.

INCLUSIONS:

- Creative Campaign Concepts and/or Messaging Platform
- Integrated Media Strategy:
 - Paid (Digital & Traditional)
 - Earned (Public Relations & Events)
 - Shared (Social & Reviews)
 - Owned (Website & Content)
- Marketing Communications Plan
 - Media
 - Campaign Planning
 - Event Alignment
- Measurement Strategy
 - Detailed KPIs
 - Measurable Objectives With Key Results (OKRs) Based on Your Goals
 - Live Data Dashboard & Calibration Sessions
- Internal and External Team Execution Alignment
- Launch Plan
 - Quick Wins, 2025 Execution and 2026 Planning
 - 12-Month Execution Roadmap & Funnel Alignment



DRIVING FULL-FUNNEL ACTIVITY

Today's customer journey isn't a straight line. A full-funnel strategy ensures we're ready for every scenario: building awareness, nurturing leads, and driving action, all at once.

- A full-funnel approach gives us the right mix to engage buyers wherever they are in their journey.
- Create meaningful engagement that drives consideration and trust with the right audience.
- Convert interest into measurable action and long-term member relationships



PART 2: ONGOING EXECUTION & OPTIMIZATION

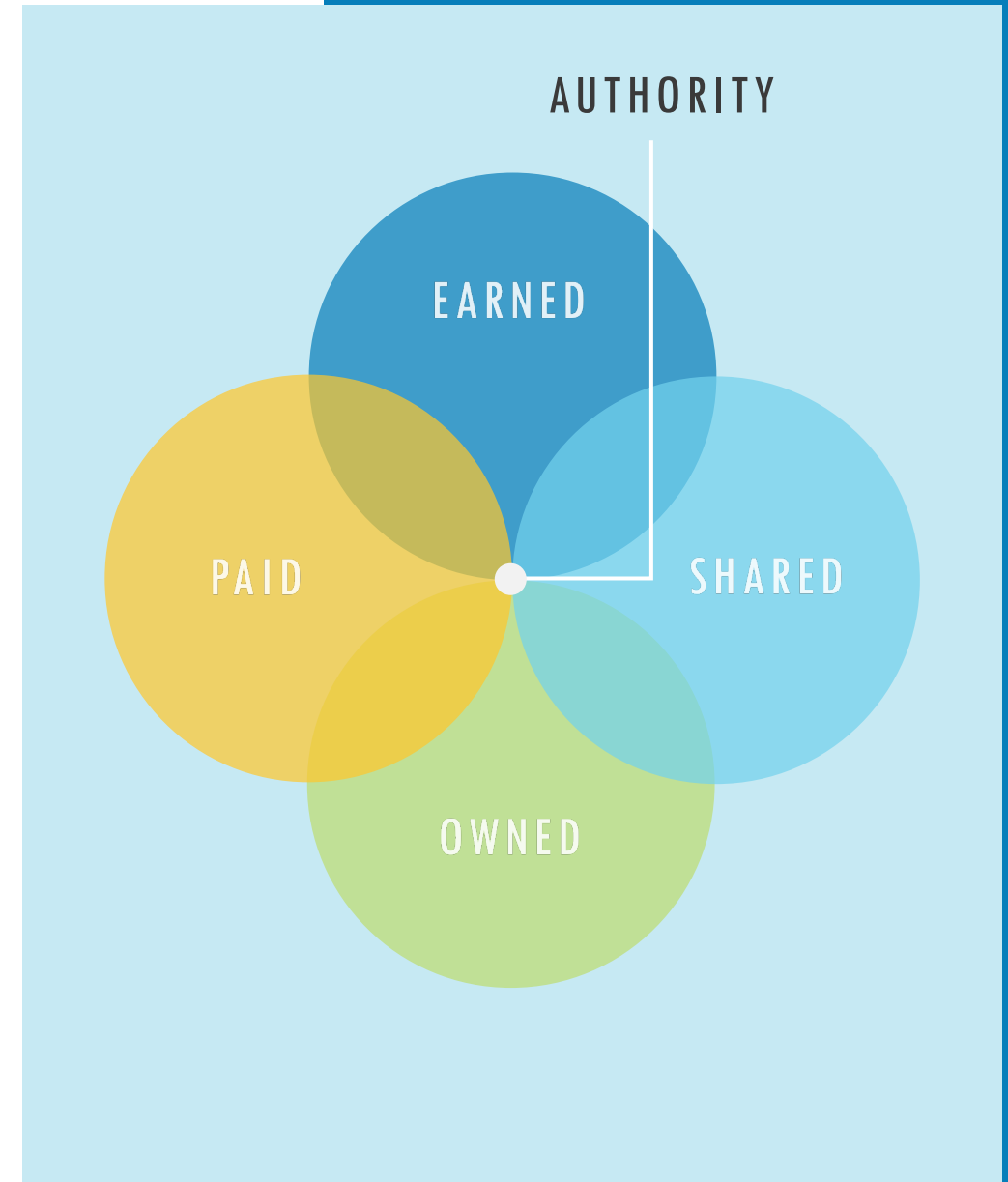
Once the strategy is in place, we move into execution, bringing the tactics outlined in the RFP to life. At the same time, the strategic foundation gives us the flexibility to adjust and pivot if we identify a better approach, ensuring each step is optimized for impact. This combination of planned tactics and adaptive strategy allows us to deliver more effective, measurable results while staying aligned with your goals.

EXECUTING FOR IMPACT

CONNECTING THE DOTS AND GETTING RESULTS

Using an integrated approach across paid, earned, owned, and shared channels, Element ensures every effort is aligned to build brand authority and drive measurable business outcomes. Specific tactics will be determined based on the strategy created in the first 60 to 90-days consisting of:

- **Defined deliverables** with campaigns, content, and assets tailored to strategy (sub-brand logo, digital ads, emails, videos, social creative assets, templates, etc.)
- **Assigned owners** for every initiative ensuring accountability and smooth execution
- **Metrics and reporting** aligned to association goals so impact is visible
- **Flexible activation** with tactics and channels prioritized to maximize ROI
 - Offers
 - Loyalty Programs
 - EAQs
 - User-Generated Content
- **Coordinated efforts** across paid, earned, owned, and shared to drive awareness, engagement, and conversions



LEARN & ADAPT

STAYING FLEXIBLE

We realize that to effectively produce results, our strategy must be flexible. We establish clear timelines, milestones, and KPIs (key performance indicators) up front and build in regular check-ins to evaluate progress. These touchpoints allow us to adapt strategies based on real-time data or market shifts, ensuring that we remain on track while staying nimble enough to pivot when necessary.

Whether it's a learned shift in behavior or a new opportunity, our process ensures that we stay **proactive rather than reactive**.



BRINGING THE PLAN TO LIFE

Building on the strategic framework we've developed, execution is where we bring the plan to life and ensure it aligns with **measurable, actionable insights**. As we transition from strategy to execution, we focus on aligning our efforts with your business goals.

Supported by an entire team of specialists, we provide ongoing reporting and strategic collaboration sessions, along with regular access to **data dashboards**, to ensure we're moving your brand in the right direction.



OUR ACTIONABLE REPORTING PROCESS

ARCHITECTURE

Provide the foundation on which future reporting is built, and part of the strategic planning process that includes brand goals and objectives.

HYPOTHESIS

Generate questions and hypotheses specific to execution that occurred within the specified reporting period. Areas of focus may include the performance of a campaign, new content, or channel of interest (in addition to the KPI reporting included in all deliverables).

ANALYSIS

Report progress against brand objectives and KPIs. Our team will also include answers to business questions raised as part of the hypothesis generation session.

ILLUMINATION

Understand the drivers of results and why they matter. Bringing in additional context provided by the internal SMEs will help drive to the relevant insight (this is where recommendations begin to take shape).

ACTIVATION

Recommend actions based on findings from the illumination phase. These are developed using the cross-functional expertise of the team and presented for your approval.

INVESTMENT

FUNDING THE GROWTH YOU'VE ENVISIONED

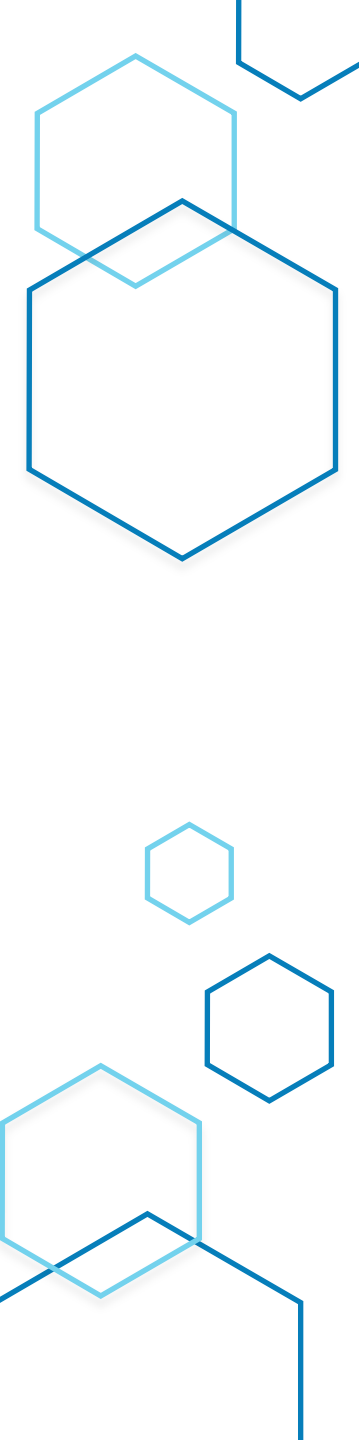
The **Discovery & Strategy Phase** is a one-time investment of \$36,000, designed to deliver a clear, actionable roadmap tailored to your membership personas — ensuring every message, channel, and tactic works toward your growth goals. This typically takes 60 to 90-days.

Execution of a ***holistic*** integrated marketing program **based on the deliverables outlined in your RFP and our strategic approach outlined in this response** is \$15,000/month for 12-months. with flexibility to scale based on your evolving organizational needs.

While your RFP listed general tactic direction, we know success starts with strategy and leads the way for specific tactic execution, messaging and channel alignment that gets results. Once the strategy is in place, we'll confirm exactly how we will approach your marketing support in alignment with your RFP deliverables while also planning for future phases.

What sets us apart is the **value built into every engagement**. You gain access to a full team of specialists — across creative, content, media, SEO, social, PR and data — all aligned to drive measurable impact and long-term success.

Please note a detailed scope of work will be provided upon approval of this RFP response.



HOW WE WORK TOGETHER

THE TEAM BEHIND YOUR BRAND





INTEGRITY

PASSION



PARTNERSHIP



AUTHENTICITY

FULL-TEAM SUPPORT

LIKE HAVING A RELIABLE TEAMMATE
(OR 45 OF THEM)

We operate as an integrated team of specialists, which means that you'll have access to experts in strategy, creative, digital marketing, content, media buying, data analytics and more.

Our depth of expertise and fluid internal structure allow us to scale resources based on the evolution of your needs. If a campaign requires additional creative development, or if we need to ramp up digital support based on market dynamics, we can quickly adjust our team composition to ensure we're supporting you effectively.

Let's have you meet **some** of your team ...

Google
Partner

Google Analytics
Certified Professional

Google AdWords
Certified Professional

HubSpot
CERTIFIED PARTNER

SECOND WIND
BE a Better Agency



Certified
HubSpot Expert



DEREK BLASZAK

NEW BUSINESS & DIGITAL DIRECTOR

He blends digital expertise with strategic new business initiatives and relationships to take every brand he touches to new heights.



Marketing without data is
like driving with your eyes
closed.

BRANDS I'VE WORKED WITH:

KOHLER.





Certified
HubSpot Expert



NIKKI PEROUTKA

PRESIDENT

She's a 20-year marketing vet obsessed with improving marketing, processes, and results.



Success is about anticipating change, embracing it, and leading the way forward.

BRANDS I'VE WORKED WITH:

abouthealth[®]

OH SNAP!
pickling co.
.....

 Credit Union
National
Association



Certified
HubSpot Expert

JODY BENNETT

DIRECTOR OF BRAND STRATEGY

She leads campaign vision and direction, ensuring powerful storytelling, while developing creative solutions that are visually engaging and strategically aligned.



Be fearless in the pursuit of
what sets your soul on fire.

BRANDS I'VE WORKED WITH:

Foot Locker





Certified
HubSpot Expert



MONICA DORO

ART DIRECTOR | UX/UI

With an eye for emerging design trends and a passion for pushing creative boundaries, she crafts a brand's identity and enhances the user experience, making sure every project is a standout expression of innovation and vision.



Great design doesn't follow,
it leads.

BRANDS I'VE WORKED WITH:





Certified
HubSpot Expert

MEGHAN MURPHY

ACCOUNT & MEDIA STRATEGIST

She crafts data-driven media strategies that cut through the noise, ensuring the right message reaches the right audience at the right time.

“

Don't push people to where
you want to be. Meet them
where they are.

BRANDS I'VE WORKED WITH:

DESTINATION
DOOR COUNTY





Certified
HubSpot Expert



BROCK MESSNER

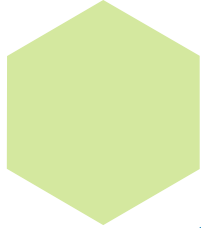
DATA & INSIGHTS MANAGER

He leads analyzing trends and generating actionable insights that drive your strategy forward, enhancing your decision-making and optimizing performance.



Be yourself. An authentic story
is always worth telling.





Certified
HubSpot Expert



E L E M E N T

KATIE BRAMSCHREIBER

DIRECTOR OF ACCOUNT SERVICES

She has a knack for building solid client relationships based on trust and ensures the delivery of high-quality strategy aligned with your objectives.



People don't care how much
you know until they know
how much you care.

BRANDS I'VE WORKED WITH:



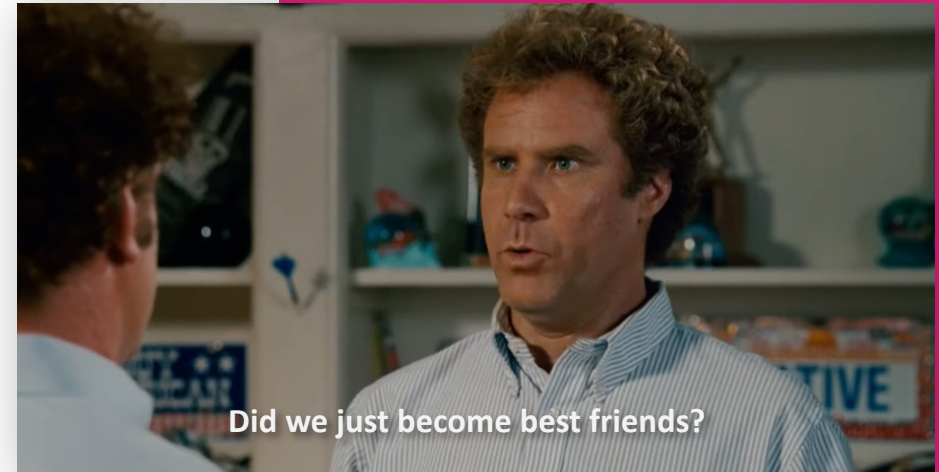
YOUR PARTNER IN CRIME

AKA: YOUR DEDICATED ACCOUNT EXECUTIVE

You will also have a dedicated Account Executive (AE) as your daily point of contact, ensuring proactive communication and project management. This person will not only advocate for your brand internally but will also ensure that we're meeting deadlines, addressing your needs, and driving the overall strategy.

Additionally, our Director of Account Services (Katie) will oversee your account, ensuring our strategy aligns seamlessly with execution and is optimized for maximum impact.

We select your AE based not only on background and industry experience, but also on personality and working style. **Before we finalize that match**, we'll talk with you to make sure the fit feels right on both sides.



STATUS MEETINGS

WE BRING SNACKS (AND SOLUTIONS)

We'll schedule regular status meetings based on your preferences, typically weekly or bi-weekly, to ensure transparency and alignment. During these sessions, we'll review project updates and upcoming deliverables, and recap action items.

Quarterly, we'll provide performance reports, covering key performance indicators (KPIs) and any proposed strategic adjustments. These meetings are designed to drive the strategy forward and keep you informed, while fostering real-time feedback.



WE ALWAYS GET REAL

OPEN, HONEST, AND SOLUTION-FOCUSED

Attitude is everything. To maximize the value of your investment, we embrace a “Get Real” philosophy built on open communication and collaboration. That means celebrating wins together and addressing challenges head-on when they arise.

If an issue comes up, we identify it quickly, involve the right team members, and work with you to develop a clear action plan with timelines and responsibilities. Your input is always part of the solution. This transparent, solution-focused mindset ensures challenges are resolved swiftly without losing sight of the bigger goal.

By keeping it real, we create an environment of trust where ideas flourish, innovation thrives, and tailored strategies deliver meaningful results.

*Keepin'
it Real*



SINCE 2023



GREAT WORK. BOTTOM LINE.

LET'S GET STARTED.

goelement.com

2081 Profit Place
De Pere, WI 54115



APPENDIX: REFERENCES & SERVICES OVERVIEW

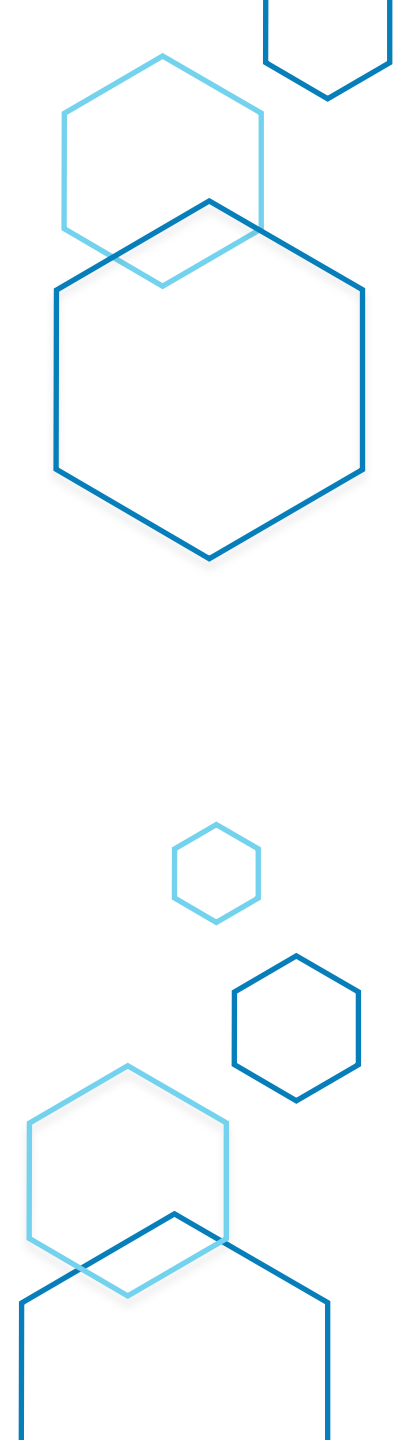


REFERENCES

Jeff Gahnz Nicolet
National Bank Marketing
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jgahnz@NicoletBank.com

Darren Wojahn
Charter Steel
800.437.8789
wojahnd@chartersteel.com

Nick Charles
Pep's Pizza Brand / AK Crust President
920.562.1071
NCharles@akcrust.com





INNOVATION & CREATIVITY

IT'S JUST PART OF OUR CULTURE

At our agency, everyone plays a vital role in driving innovation and creativity. Regardless of department or role, every team member contributes fresh ideas and stays informed about the latest marketing trends. This collective commitment has helped us build many long-standing relationships with clients over the years.

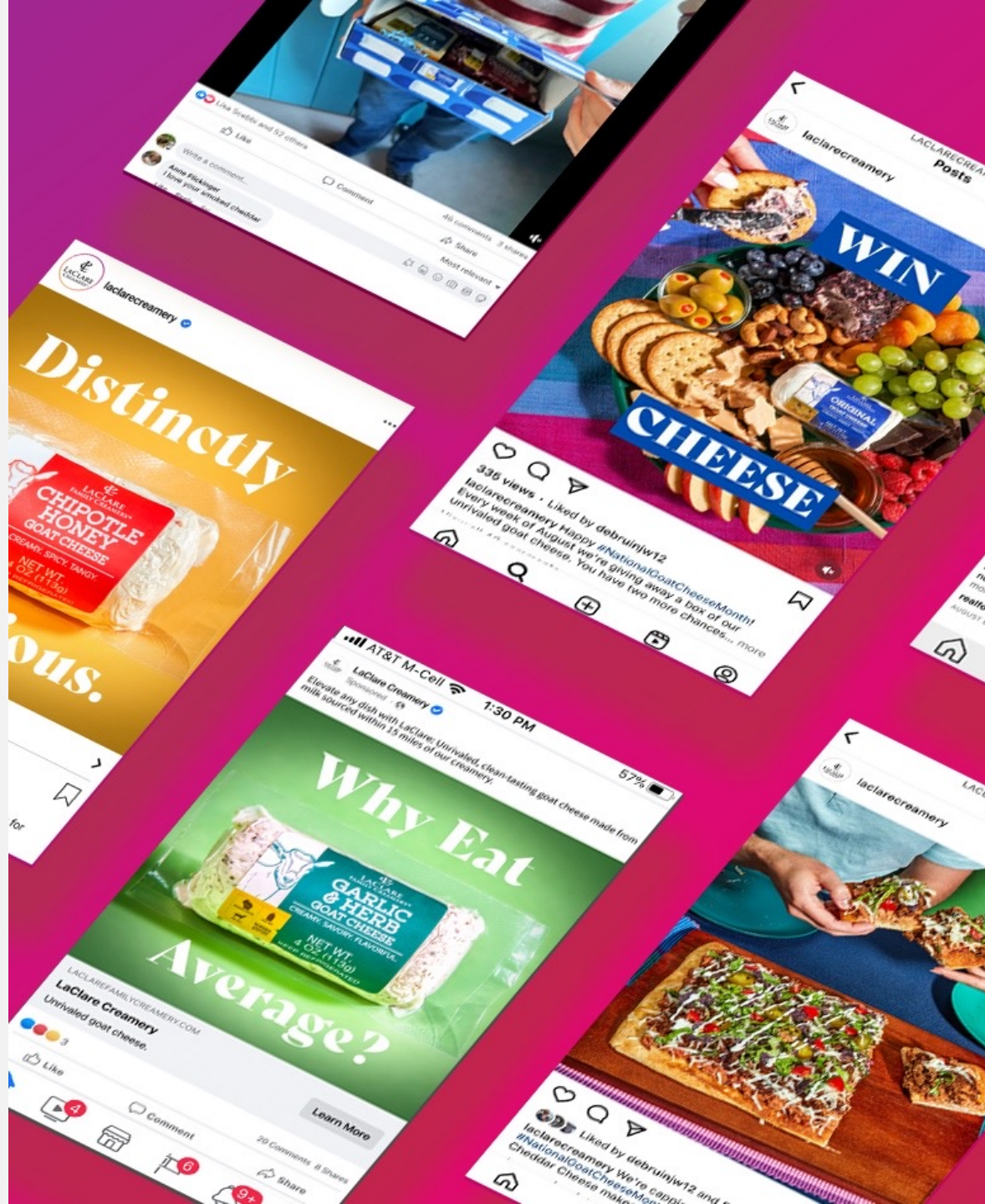
We also regularly coordinate cross-functional **Think Tanks** that unite creativity, strategy, and data to brainstorm and refine ideas that not only keep us on trend but also push the boundaries of what's possible.



STRATEGY

Our strategies will elevate your strengths, set you apart from the competition, and engage your audience in an impactful way that ultimately leads them down the sales funnel and produces results.

- Primary and Secondary Research
- Competitive and Market Analysis
- Target Audience Profiling and Segmentation
- Customer Journey Mapping (Path-to-Purchase)
- Go-to-Market Messaging Strategy
- Marketing Communications Plan



BRANDING

Whether you're building it from scratch or revamping an existing one, Element has the expertise to carefully craft the components of a powerful brand, packaged neatly into a Brand Playbook to keep internal and external stakeholders perfectly aligned.

- Brand Objective
- Brand Position
- Brand Identity
- Brand Personality and Voice



CREATIVE

Cutting through the clutter and engaging your audience requires a deep understanding of your target audience and pairing that with your brand's unique value proposition.

At Element, we work at a high level to deliver your brand identity through impactful creative that's aligned with your goals. Translation? We get creative. You get results.

- Brand Identity Assets
- Campaign Concepts
- Traditional and Digital Design
- Direct Mail
- Tradeshows
- Environmental Graphics
- Media Assets (outdoor, digital, radio, TV, etc.)



CONTENT

Content builds trust with your prospects and connects them to your brand while moving them through the buyer's journey. Our team of specialists create high-performing content and offer creative suggestions to bring that content to life and engage your target audience at various stages in the sales funnel.

- Photo and Video
- Optimized Blog Content
- Educational Resources
- Success Stories
- Email Marketing
- Social Posts
- Landing Pages



STUDIO FORTY FOUR

OUR VISUAL CONTENT STUDIO

Commercial Photography

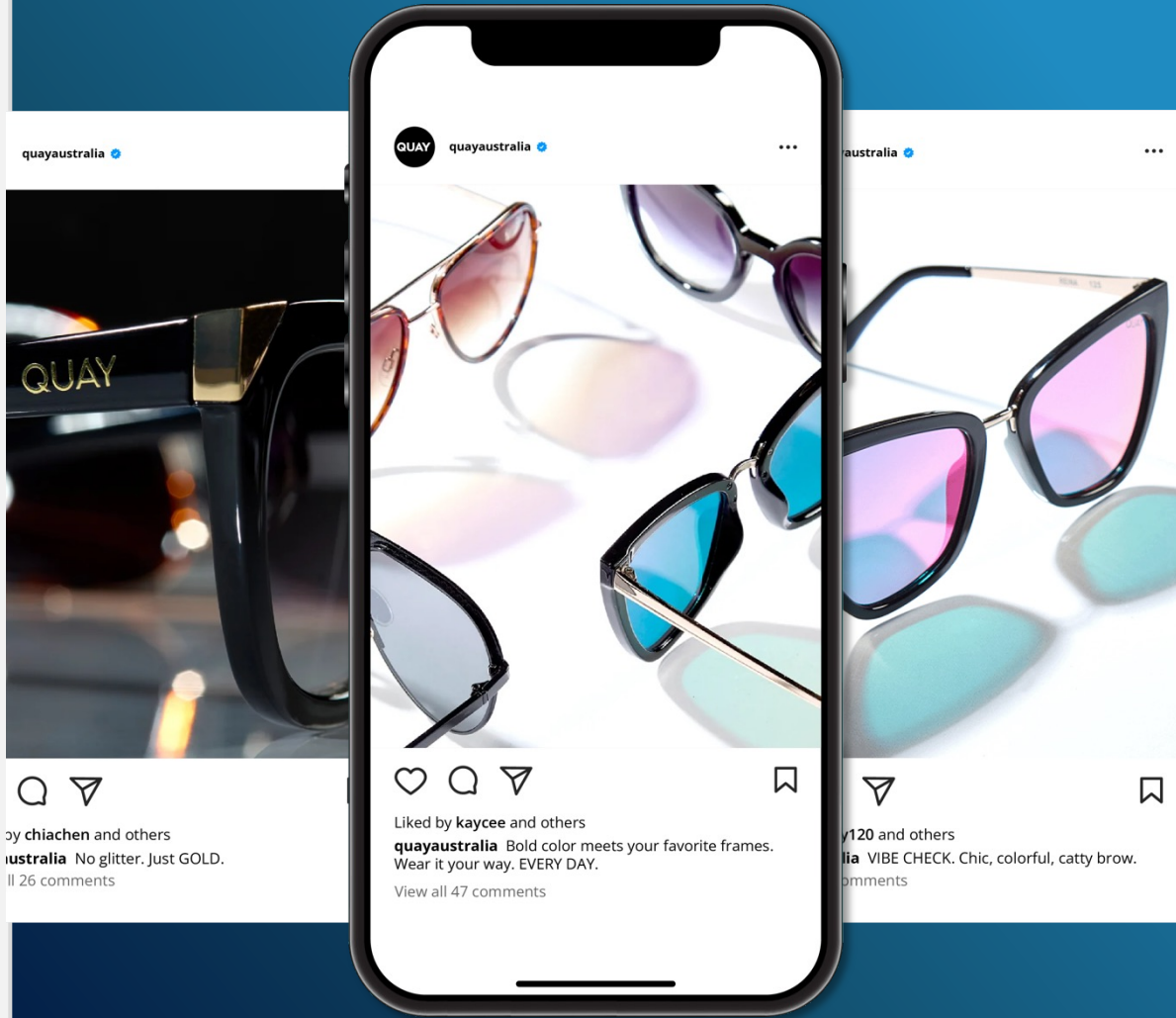
- Commercial, Product, Lifestyle, Advertising, Industrial, Architectural, Illustration, etc.

Commercial Video

- Broadcast, Corporate, Public Service Announcement (PSA), Social Media, Animation, Product/Demo, Culture, etc.

Other Services

- Drone, Computer-Generated Imagery (CGI), and Retouching



SOCIAL MEDIA

With social, authenticity is everything. It's where your brand builds trust, showcases personality, and connects meaningfully with your audience. With a focus on strategic creativity, we align your brand with the latest trends and create stories that resonate.

- Platform-Specific Strategy
- Social Content Capture and Creation
- Social Listening and Trend Monitoring
- Hashtag and Keyword Optimization
- Influencer and Ambassador Partnerships
- Paid Social Advertising



MEDIA

We offer traditional and digital media services. When combined, they enhance each other to maximize brand exposure and build brand awareness—and constantly adapt to bring qualified audiences to you.

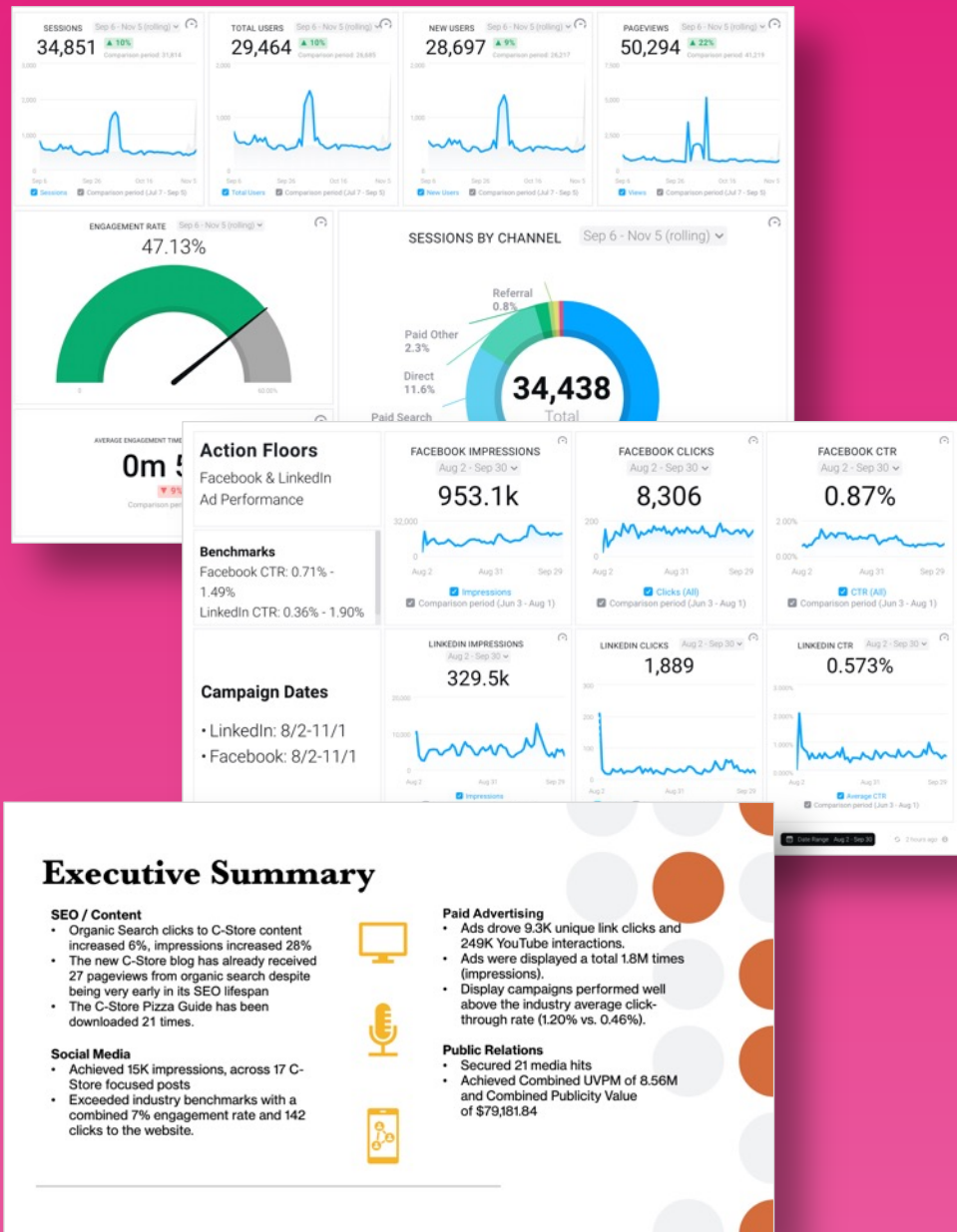
- Customized Digital Display
- Behavior Targeting
- OTT Advertising
- Social Media
- Radio, Podcasts, and TV Advertising
- Out-of-Home Advertising
- Print Advertising
- Experiential Marketing
- Sponsorship Activations
- Search Engine Marketing (SEM)



PUBLIC RELATIONS

From earned media to cause campaigns, we have the know-how to make your brand all the rage with key audiences and shed light on your industry expertise—all while integrating your campaign into a larger marketing strategy.

- Earned Media
- Community Relations
- Events and Cause Activations
- Industry Partnerships
- Branded Content
- Contributed Articles
- Influencer Campaigns
- Media List Development
- Press Releases



REPORTING AND ANALYTICS

Some call us “data-obsessed” because we know that without data, there would be no results. Focusing on your audience and developing measurable goals is essential, but you must also adapt based on your audience’s behavior and the data. Our Integrated Reporting Strategy is an end-to-end framework that provides key insights, custom recommendations, and continuous improvement plans to do more for your bottom line.

- Defined Measurement Strategy
- Live Data Dashboards
- Key Insights and Recommendations
- Ongoing Monitoring and Analysis



WEBSITES AND MOBILE APPS

Whether you're looking to give your site a refresh or build a new site from the ground up, our expert team has your back. We use the right blend of technology and branding to create a powerful user experience with your brand.

- UI/UX Strategy, Content, and Design
- Custom Programming
- Content Management System Integration (CMS)
- Technology-Agnostic Approach
- Search Engine Optimization (SEO)
- Email Automation
- Americans with Disabilities Act (ADA) Compliance
- General Data Protection Regulation (GDPR) Compliance

EXECUTION IS EVERYTHING

CONNECTING THE DOTS

Execution is the hardest part of the equation; it's what separates the good from the great.

Since 2003, we've been obsessed with finding a better way to develop best-in-class content and build a high-performing suite of integrated marketing services.

We continuously grow, adapt, and strengthen our connections to achieve better results for our clients.

