



erickson barnett

NEA  
PROPOSAL

October 27, 2004



## NEA Proposal [09/22/2004]

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## The Big Picture

With more than \$6 billion dollars under management, a 25 year history of successful investments, more than 500 portfolio companies, and offices across the country, NEA has definitively carved its niche as a respected leader in the investment community. But, while your name / brand is known and respected, your visual identity unfortunately does not support the essence of the NEA brand.

And today it is time to change! This proposal is for the creation of a range of core identity and marketing vehicles which together will form the foundation of a powerful and strong brand presence.

Our approach to your needs is broken into two phases. Phase one addresses the web project — the primary need. During this phase we will begin the development of your new identity and deliver a new web site. In Phase 2 we will address the full development of your identity across multiple marketing vehicles.

Throughout this proposal, we've included specific examples of how we've achieved goals similar to yours with clients such as SAVVIS, Tellabs, Kauffman Foundation, Valhalla Partners, MAVA, and many others.

The following sections provide insight into our philosophy, our understanding of your needs, our clients, our work, and our plan and fees for Phase 1 and Phase 2.

## Our Philosophy

In 1987, Erickson Barnett opened its doors with a mission to help technology companies communicate their message effectively. In the seventeen years since, much has changed.

We've expanded from an interactive agency to a full-service marketing firm with clients ranging from the hottest technology firms to the Fortune 500. We've grown, we've moved, we've won awards, and we've even changed our name (twice). But through it all, several core philosophies have never changed:

**Be Smart** – our tagline is “smart marketing.” To us, these are much more than words on paper. They represent how we act. Our people are business savvy professionals – our designers, our developers, our account managers, and our leaders think about our customers needs, reflect on multiple solutions, look at what the impact will be, and present the “smart marketing” solution that our customers have come to expect.

**It's Not About Creative Awards (although they are nice too)** – We believe great creative must be unique, remarkable...and most importantly relevant. It's that last word “relevant” that drives our process. Before we even think creatively, we begin with the message. Only when we understand the message and how you want your audience to interact with it do we begin the creative process. Sometimes we win awards...but we always satisfy our customers.

**Designers Must Be at the Table** – We don't think it makes much sense for our Account Managers to interpret your needs and then translate them to our designers...so we have them sit right at the table with you. They hear what you say directly from you, not third hand. And we think that makes all the difference in delivering the right creative the first time out.

**Deliver Efficiency** – Whether a web site, a PowerPoint pitch or a piece of collateral, our goal is to deliver great work while at the same time allowing our customers to carry it forward themselves. We don't consider it a success if we fail to enable you to do the little things you need to do every day. So we deliver content management tools for the web, templates for PowerPoint, shell sheets for collateral...and whatever else you need to be self sufficient when you need to be.

**Think Forward** – We challenge ourselves, and our clients, to think about what is happening today and what will happen in the future. Which helps us deliver solutions that work now and in the long run.

**Have a Little Fun** – Does this help us create award winning marketing programs? Well, it's not scientifically proven (yet), but we believe the energy created at Erickson Barnett and the work we produce is a direct result of our environment. We know what we do is serious business, but every day we try to instill a little bit of fun in our organization. And, we try to share that with our clients.

## Your Needs

### PHASE 1 – WEB SITE

With every project we undertake, step one is always to understand our client's needs. So far we've had an initial meeting with your team and learned a bit about your needs. We've also had a conversation with your technical team to gain a better understanding of what they need from us. Next, we reviewed similar projects we'd completed for other clients.

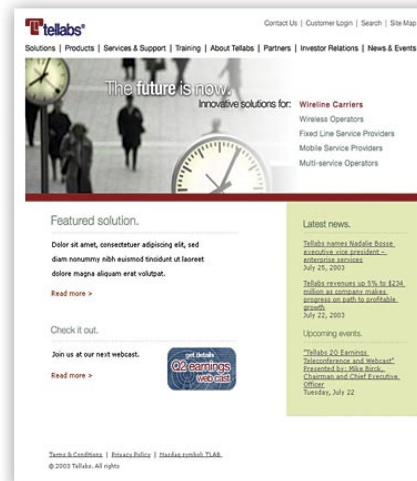
Based on that knowledge we have prepared the following list of deliverables, approach and fees for the creation of the new NEA.com

### DELIVERABLES – DESIGN AND ANALYSIS

Your web presence is arguably the most important communications vehicle you own. It's the single place where you can instantly control your communications. It is your face to the public. And it must represent NEA appropriately to the market. As part of our approach to your new site we will address:

**Site Architecture** – We meet with your team, learn about your audiences, and then develop the right site architecture. We firmly believe each audience, limited partners, media, prospective businesses, must have their own home on your site.

### IN ACTION



#### Tellabs [www.tellabs.com]

Fortune 500 company with 8 product lines, over 50 products, and multiple solutions supporting the telecom industry worldwide. In 2004 we re-architected, designed and developed this very content rich, yet easy to navigate, web site. The site was recognized by The Weekly Standards for design, layout, and coding excellence.



#### MAVA [www.mava.org]

Our regions venture capital association with a membership of 375 venture capital professionals from 135 firms with more than \$10 billion in capital under management. In 2003 Erickson Barnett was selected to re-architect, design, and build both the MAVA and Capital Connection sites in 2003. Today we are still involved in maintaining both sites.



## Your Needs

**Site Design** – The right design will help establish and enhance your overall visual identity and brand. And a smart design — which is what we always deliver — ensures visitors get to their destination quickly and easily.

**Usability** – We're known for creating smart navigation systems and great design. It works together to allow visitors to find what they need quickly, lets them know where they are at all times, and enhances the entire experience.

**Page Layout** – Once your visitor lands on the right page, it is absolutely critical to provide clear, concise information. We layout key pages, structuring content (words and diagrams) to help visitors hone in on exactly what they need.

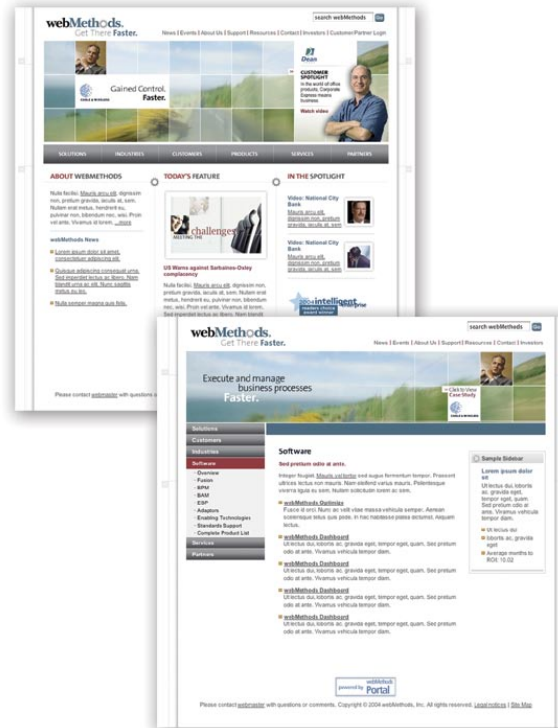
Integration with CMS – this topic is covered in detail in the next section.

**Search Optimization** – Search engine optimization (SEO) is the process of making your site more easily found by search engines. Our staff has dedicated themselves to demystifying this important step in the web design/development process. In fact, we've recently written two white papers on search optimization (you can find these on our web site):

- Practical Search Engine Optimization (7/2004)
- Copywriting for Search Engine Placement (4/2004)

All of these elements work together to create the right site for NEA and your audience.

## IN ACTION



### webMethods [\[www.webmethods.com\]](http://www.webmethods.com)

webMethods chose Erickson Barnett as the right agency to create a new identity and web site for the re-branding of their company and launch of their new industry leading business process management product suite. The web site helped to unify, simplify and amplify the webMethods message and provided them with a unique, remarkable and relevant look —enabling them to stand out in the competitive landscape.

### Erickson Barnett White Papers

We've recently published two white papers on search optimization. Enclosed in this proposal packet, they provide a great synopsis of the practical aspects of SEO.

## Your Needs

### DELIVERABLE – INTEGRATION WITH CONTENT MANAGEMENT SYSTEM (CMS)

Designing and developing a web site is infinitely more complex than just a few years ago. The widespread use of CMS impacts both the design and development process. We work closely with our clients' IT Departments and other vendors to design and build web sites that seamlessly integrate with both commercial and in-house systems.

We understand what questions to ask. We know how to design a site within the confines of a particular technology. We've worked with:

- A wide variety of custom-built systems
- BEA Portal Technology
- Documentum
- BroadVision
- webMethods Portal

As part of this project we will work closely with the Seva Group. It is critical that both Seva Group and Erickson Barnett clearly understand the requirements and limitations of the CMS technology as well as our defined roles in this project. We have already had an initial conversation with the Seva team and find that our approach to this project matches their needs — so we are off to a good start already!

### IN ACTION



### Kauffman Foundation

#### Site launching in October 2004

Among the 25 largest foundations in the world with assets exceeding \$2 billion, Kauffman Foundation focuses on encouraging entrepreneurship across America. They engaged Erickson Barnett to design several web sites and portals to support their cause:

- Kauffman.org (in development). Working closely with the CMS vendor, we designed a site and delivered templates that take full advantage of the existing custom-built CMS.
- Entrepreneurship Researchers (launching August 04), The Entrepreneurship Portal (in the planning stages), and the E-Giving Portal (in the planning stages) all use state-of-the-art BEA Portal Technology with Documentum as the back-end CMS. We are working with multiple vendors to ensure our design provides an exceptional user experience, allows Kauffman staff to easily maintain the sites, and extends the Kauffman brand.



### Aether Systems [www.aethersystems.com]

Another award-winning site, AetherSystems.com was architected and designed around an in-house CMS. Erickson Barnett worked closely with Aether IT staff while the CMS was being built. We provided assistance on many aspects of the CMS, including functionality, user interface, and QA testing.



## Your Needs

### DELIVERABLE – COPYWRITING

Based on our initial meeting, we felt there was a need for limited copywriting — specifically for your web site home page and selected section home pages. We recommend this approach for two reasons.

- These are the most important pages on your site. As you know, there are precious few moments to grab the visitor's attention. Professional copywriting will only increase the opportunity to convert visitors into prospects, and ultimately to customers.
- Professional copywriting, with attention to search engine optimization, can dramatically increase your rankings.

We provide copywriting services ourselves. In addition, we also use several award-winning copywriters:

#### Tierney Sadler

Over the past 18 years, Tierney has made strategy her primary goal when creating award-winning concepts and copy for agencies and organizations throughout the Washington, D.C. area. Working first in agencies, then in in-house organizations, and then on her own, Ms. Sadler has gained experience in all disciplines of advertising. From print and broadcast copywriting to websites and branding initiatives, her work has earned numerous local and international awards for creativity, not to mention the unequalled reward of producing results for her clients by making every word count.

#### Nancy Beckman

Nancy is an award winning writer who specializes in copywriting for high-technology companies, including web site copy, sales literature, case studies, and lead generation materials. She takes far more than a “surface-level” approach. Before she writes a single word, she digs deeply into her client's business and understands their products and market from the inside out. Her approach is especially useful for companies who want to differentiate themselves from their competitors and position their services in a crystal clear and personable style.

### IN ACTION



### Writing for the Web

Sometimes, we write the copy. Occasionally, we hire professional copywriters (as was the case for the items above). Most often, our clients write original copy, and we do the editing. We always provide (and follow) our guidelines for writing web copy. Based on years of experience and research, these guidelines make the copy more readable, skimmable, and digestible.

## Phase 1 Proposed Approach

Outlined below we have provided our approach to the web project. The approach is modeled to your specific needs and based on our experience building hundreds of web sites over the years. We've learned something from every one of those engagements. We build those lessons into our TechnIQ™ methodology. This allows all our clients to benefit. It means we do things better. And, we do them faster.

TASK	DESCRIPTION
Kickoff Project	<p>The first step is to ensure our entire team clearly understands your:</p> <ul style="list-style-type: none"> <li>· Project goals</li> <li>· Target audience(s)</li> <li>· Positioning within the marketplace</li> <li>· Brand values</li> </ul>
Identify Technical Guidelines/Restrictions	<p>Our technical team meets with your web CMS team to define any guidelines/restrictions on design and layout. These guidelines/restrictions are documented and relayed to our creative team to ensure proposed designs will work within the SEVA system.</p>
Define Site Architecture	<p>With a keen focus on your audiences' needs, our information architects work with you to define:</p> <ul style="list-style-type: none"> <li>· All major sections of the site</li> <li>· Sub-sections and pages</li> <li>· Appropriate "chunks" of content</li> <li>· How they all interrelate</li> </ul> <p>The end product is a site architecture (or site map).</p>
Define Key Messages / Draft Site Content	<p>Once the site architecture is defined, Erickson Barnett will create key content – including copy for the home page and main landing pages. The overall tone for the site will be established as part of this process. If needed, Erickson Barnett will also create original content for the entire site, or will provide the NEA team with guidelines for writing for the web to help you create content for lower level pages.</p>
Design Comps	<p>Three unique comps are designed (each by a different designer). Each designer focuses on reinforcing your message using color, visuals, page layout, and typography. Comps include home page, and two sub-pages.</p>

## Phase 1 Proposed Approach

TASK	DESCRIPTION
Select/Create Photos/Art	As needed, additional photo or artwork is selected or created and submitted for approval.
Identify Templates To Be Created	<p>With overall design approved and content drafted, the individual templates to be created are identified. Templates typically include:</p> <ul style="list-style-type: none"> <li>· Home page</li> <li>· Section home pages</li> <li>· Sub-pages (one for each level within the site)</li> <li>· Unique content pages (e.g., news, forms, etc)</li> </ul>
Lay out Page Content	Our designers lay out page content for the templates identified. Each page is reviewed for ease of use and readability to ensure site visitors can quickly find what they need.
Build Prototype HTML Templates	With design approved, our technical team creates a home page and sub-page template for review by the Seva Group. This step ensures structure and coding are approved and tested before all templates have been coded.
Build Remaining HTML Templates	With template coding and structure approved, our technical team builds remaining templates and provides to the Seva Group for approval.
Create Template Style Guide	A Template Style Guide is created to ensure the Seva Group has a clear understanding of the templates provided and which is appropriate for each page in the site. Details such as color, font, and code documentation are provided.
Technical Handoff	Our technical team meets with Seva Group to review the Template Style Guide and answer any remaining questions.
On-Going Support	Both our design and technical teams will be made available to answer any questions during site build out. Eight hours of support are included in proposed fees. Additional, hours are billed hourly as needed.
Testing/Site Review	Once the new site is ready for testing, the Erickson Barnett design team reviews pages and provides feedback on design, layout, and functionality. Eight hours of QA support are included in the proposed fees. Additional hours are billed hourly as needed.

## Phase 1 Budget Estimate

This section of our proposal breaks out budget estimates by Phase 1 deliverables. Under each estimate, you'll find a brief list of tasks associated with that deliverable.

Note that our estimates are fee ranges. The lower number is where we truly believe the project should come in. The higher number allows for the inevitable minor changes that occur as the project progresses. While we always aim for the low end of the range, the high end provides us the flexibility to continue the project without endless change orders and discussions about project scope. We diligently track our hours and will provide ample warning of scope changes that impact budget.

### BUDGET ESTIMATES BY PHASE

#### Design

##### Analysis

- Kickoff Project
- Identify Technical Guidelines/Restrictions
- Define Site Architecture

##### Creative

- Design Comps
- Select/Create Photos/Art

##### Content Layout

- Identify unique content pages
- Layout unique pages

##### Design Fees

\$25,000 to \$30,000

##### Copywriting Fees

\$3,000 to \$10,000

## Phase 1 Budget Estimate

### Production Assistance

- Identify Templates to be Created
- Build Prototype HTML Templates
- Build Remaining HTML Templates
- Create Template Style Guide
- Technical Handoff
- On-Going Support
- Testing/Site Review

### Fees

\$10,000 to \$15,000

### Assumptions

Of course, like all estimates, ours are built upon a series of assumptions. Major assumptions are that Erickson Barnett will:

- Create 3 design comps with up to 2 rounds of revisions on a selected concept.
- Layout up to 15 unique page types.
- Build HTML templates for up to 15 page types.
- Provide whatever on-going support the NEA technical team requires – 8 hours are included in these estimates – additional hours will be billed at \$125/hour.
- Provide whatever QA assistance NEA requires – 8 hours are included in these estimates – additional hours will be billed at \$125/hour.



## Your Needs

### PHASE 2 - LIMITED PARTNER EXTRANET

Building from the identity created for your new outward facing web site, Erickson Barnett will create a complementary, but scaled back, look for your Limited Partner Extranet. This is a fairly common process, and one which we have delivered for:

NFR Security – Customer Support Site

NFR Security – Partner Site

SAVVIS – Partner Extranet

Our approach to this project is:

- Finalize site structure and content requirements.
- Establish design requirements.
- Provide two design comps.
- Review. Revise. Approve.

Development tasks include:

- Develop templates for NEA technology team.
- Deliver templates and usage instruction.
- Test site on final hosting platform.

### IN ACTION



SAVVIS Partner Extranet



NFR Security Customer Support Site





## Your Needs

### PHASE 2 - FULL IDENTITY DEVELOPMENT

Depending upon your needs, the deliverables for this Phase of the project could include:

- Complete Identity Development
- Color Palette
- Typography
- Photo style selection
- Tone
- Creation of a Brand Guidelines book — for your internal use.

### IN ACTION



TRUENORTH



Ariba Corporate Brochure

TrueNorth Stationery Suite



## Your Needs

### PHASE 2 - COMMUNICATIONS TOOLS

Once the identity is complete we will begin to develop your communications tools. These can include:

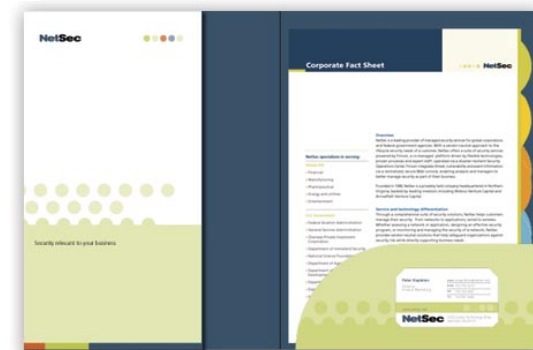
- Firm Backgrounder
- Folder
- Data Sheet System – inclusive of current and historical portfolios, portfolio IPOs, milestones, NEA investing partners.
- Data Sheet Template
- PowerPoint Template
- Press Kit
- Stationery – letterhead, business cards, envelopes, note cards
- Flash presentation pitch
- E-Newsletter
- Event Invitations

In our world, all of this tends to happen over a period of time-starting with the identity creation and working through the communications vehicles in order of priority.

### IN ACTION



SAVVIS Corporate Brochure



NetSec Collateral System

## Phase 2 Budget Estimate

This section of our proposal breaks out budget estimates for each identity component. As with the web site budget, our estimates are fee ranges. The lower number is where we truly believe the project should come in. The higher number allows for the inevitable minor changes that occur as the project progresses. While we always aim for the low end of the range, the high end provides us the flexibility to continue the project without endless change orders and discussions about project scope. We diligently track our hours and will provide ample warning of scope changes that impact budget.

### BUDGET ESTIMATES

Identity Development and Brand Guide: \$5,000 - \$7,000

Firm Backgrounder (4 pages): \$6,500 - \$8,000

Folder (two pocket): \$3,000 - \$4,000

Data Sheet System (7 sheet system inclusive of current and historical portfolios, portfolio IPOs, milestones, NEA investing partners): \$7,000 - \$9,000

Data Sheet Template: \$1,500 - \$2,500

PowerPoint Template: \$1,500 - \$2,500

Stationery – letterhead, business cards, envelopes, note cards: \$4,000 - \$5,000

Flash presentation pitch (3 minute): \$15,000 - \$17,000

E-Newsletter: \$3,500 - \$4,000

Event Invitations (6 x 9 postcard): \$3,000 - \$4,000

Limited Partner Extranet: \$7,500 - \$10,000

## Capabilities Summary

The attached brochure gives an up-to-date view of Erickson Barnett, Inc. Key facts and brief bios of key players on the project team are presented below.

### The Facts

#### Founded

1987

#### Headquarters

Reston, Virginia

#### Principals

Lee Erickson, Jeff Erickson

#### Employees

13 Total Staff

**Creative Team (4)** – All skilled in Web, Flash, and Print Design

**Technical Team (4)** – Mix of HTML, Flash, and Database Developers

**Marketing/Sales/Account Management Team (5)** – All completely dedicated to client service and satisfaction (would you have it any other way?)

#### Key Clients

SAVVIS, VeriSign, Kauffman Foundation, Tellabs, SER, webMethods, Arnold & Porter

#### Recent Awards

2004 AXIEM Award – SoftMed and NFR Web Sites, INPUT and WebSurveyor Flash Demos

2004 Summit Creative Award – SoftMed Corporate Web Site

2004 Addy Citation of Excellence – SoftMed Corporate Web Site

2004 Addy Citation of Excellence – NFR Security Corporate Web Site

2003 Addy Citation of Excellence – Aether Systems Web Site

2003 AXIEM Award – SAVVIS Multimedia Presentations

2003 AXIEM Award – Aether Systems Web Site

2003 AXIEM Award – Network for Good Youth Volunteer Network Web Site

2003 Summit Creative Award – Aether Systems Corporate Presentation

2004 The Weekly Standards – Tellabs Corporate Web Site

## Capabilities Summary

### Bios

#### Lee Erickson

##### Founder, Creative Force, Fearless Leader

Lee Erickson co-founded our agency in 1987 with a firm belief that *content drives creative*. She instilled in all of us a philosophy of “smart marketing” in all that we do. From the beginning of every project — whether a web site, a tagline, a logo, or a piece of collateral, your entire design team will understand what NEA is all about, and more importantly, why it matters in your markets. It is Lee’s belief that our designers must sit at the table with you, listening to you first hand, not an Account Manager’s interpretation. It’s just a smart approach.

#### Christine Campbell

##### Chief Marketing Officer, Chipotle Fanatic, Brand Advocate

Christine brings more than fifteen years of marketing expertise to the table. From patents to wireless, Christine has worked marketing magic in a variety of markets and has held strategic marketing roles with The Thomson Corporation, Riverbed Technologies, Aether Systems, SAGA (Software AG), and started her career selling ad space at Washington Technology newspaper. In addition she has led partnership branding strategies with many companies including Palm, AOL/Time Warner, and Sharp. Her ability to understand messaging and markets and translate them into real world applicability will be used to ensure our messaging and design work meet your expectations the first time out.

#### David Kammerdeiner

##### Art Director, Connoisseur of Krispy Kreme Doughnuts, Guru of Customer Satisfaction

David is an award winning, seasoned design veteran. In addition to adding some serious design talent, David enhances our focus on quality and client service. His creative talents, combined with his ability to lead significant projects from kickoff through creative and production, are a unique and powerful mix that will ensure the highest quality of work and service for NEA.

#### Nicholas Tolson

##### Chief Technology Officer, Knower of Something About Everything, Master of Customer Technology Integration

Nicholas is a Macromedia certified developer who has worked with clients such as Aether Systems, SAVVIS, SoftMed, and Kauffman Foundation to ensure a clean transition between the Erickson Barnett design team and the client’s technology team. Nicholas knows from real experience what questions to ask up front to minimize headaches and maximize efficiency.

## References



**Sandra Wade**

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