

# REQUEST FOR INFORMATION FOR MARKETING AGENCY SERVICES

## COMPANY

Five Secrets, LLC  
Honolulu, HI

## BACKGROUND

With the growing popularity of yoga, meditation, and mindfulness, many people have come to appreciate that there is more to life than meets the eye. This realization has led them to seek answers to life's most important questions: "*Who am I? What is the purpose of life? Where can I find true, lasting happiness?*"

Over the past 50 years, Siddha has distilled the centuries-old yoga teachings and the path of self-realization into fundamental understandings and practices, and is wanting to deliver that universal wisdom in a way that is approachable and systematic to people around the world, no matter their age, gender, culture, or religion.

In 1977, Siddha (Jagad Guru Siddhaswarupananda) founded the Science of Identity Foundation ([www.SIF.yoga](http://www.SIF.yoga)) with the goal of helping people understand and integrate yoga's spiritual teachings and practices into their lives. SIF's limited online presence over the years, however, has hampered the ability to effectively counter misinformation and misunderstandings about the path of yoga.

In today's world, it is increasingly clear that the positive and inspiring content Siddha has to share will be of tremendous value to people from all walks of life. We are therefore seeking to launch the new "Five Secrets" brand and online platform, spearheaded by Siddha's new book entitled ***The Five Secrets: Wisdom and Meditations for a Joyful Life and Fearless Death***. Featuring links to interactive online guided meditations, this book strikes an open tone of understanding and balance, truly embodying the essence of the yoga tradition. Our hope is that it will reach a broad audience and help anyone and everyone discover a deeply purposeful and satisfying life.

## THE OPPORTUNITY

We are now seeking a creative, forward-thinking, collaborative and experienced partner to guide and help enable our efforts to:

1. Drive awareness of *The Five Secrets* to build a broad, mainstream audience.
2. Develop a sustainable brand, a scalable communications strategy and a robust media plan that builds trust and positions Siddha as an authority in the yoga tradition and its core teachings.
3. Leverage modern communications platforms, on-trend techniques and technical capabilities to construct an interconnected, compelling and scalable digital ecosystem that meets people where they are to support them in their ongoing and individual spiritual journeys.

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## THE PROCESS

To move swiftly and respect the time investment in this process by invitees, we have developed a simplified process:

**Stage 1: Request For Information** - Go / no go qualification round intended to shortlist interested and qualified potential agency partners by invitation.

**Stage 2: Request For Qualifications** – Up to six agencies will be selected to respond to a RFQ, expanding on their experience, their processes and providing more specificity about the potential team to be assigned.

**Stage 3: Interviews** – Agencies selected for this stage (approximately three agencies) will be invited to have their team meet with our team for a 1 to 2 hour Q&A session. (Likely remotely.) Questions will be based on a review of their RFQ response to expand upon their case studies, qualifications and current capabilities.

At the interview stage, we will be looking to understand how the following might enhance the expertise identified in your response:

- Your approach to your current clients' business and how you've managed challenges
- Your approach to our specific requirements
- Alignment and potential for collaboration

## TIMING

*\*SUBJECT TO CHANGE\**

STAGE IN PROCESS	DATE
RFI Issued via email	April 6, 2022
Agency Responses to RFI due via email	April 13, 2022
RFQ Issued via email to qualified agencies	April 18, 2022
Inquiries concerning RFQ via email due	April 20, 2022
Inquiries responded to	April 22, 2022
RFQ Submissions due via email	May 6, 2022
Shortlisted Agencies	Week of May 9, 2022
Interviews with shortlisted agencies	Week of May 16, 2022
Agency selection	By May 31, 2022

All inquiries concerning this RFI should be submitted to Michelle Read-Kulig: [mrk@kulicom.com](mailto:mrk@kulicom.com)

*Note: questions and answers will not be shared with other proponents unless the question is simply a matter of clarification.*

Final RFI submissions, including the information requested in the table below, should be submitted to: Michelle Read-Kulig, [mrk@kulicom.com](mailto:mrk@kulicom.com) Subject: Five Secrets RFI Response

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## RESPONSE FORMAT

Overview	<ul style="list-style-type: none"> <li>Agency name, website, social media handles</li> <li>List of all locations and head count by office</li> <li>Network affiliations, media, PR and other partner affiliations</li> </ul>
Personnel	<ul style="list-style-type: none"> <li>Name, title, email address and mobile number of primary contact during the RFP process</li> <li>List of senior management team members and key department executives with brief bios</li> </ul>
Clients	<ul style="list-style-type: none"> <li>List agency's top five clients (by revenue), percentage of total revenue and agency tenure</li> <li>List clients added over the past two years with date appointed</li> <li>List clients lost or resigned over the past two years and brief explanation for why</li> </ul>
Financial	<ul style="list-style-type: none"> <li>Describe the agency's ownership structure, incorporation date and business number. (If part of a network, date acquired.)</li> </ul>
Remuneration	<ul style="list-style-type: none"> <li>A brief summary of preferred agency remuneration methodology - i.e. project, retainer fee, commission, results-based, etc.</li> </ul>
Services	<ul style="list-style-type: none"> <li>Summarize the range of relevant services in your offering, specifically in the following areas: branding, book launch and publicity, video production, influencer marketing, email marketing, digital marketing strategy, channel strategy/ experience design, campaign management, media planning, buying and optimization including social, PPC, paid search, content marketing, design, copywriting</li> <li>Indicate the agency's specific strengths and / or areas of focus</li> </ul>
Suitability and Interest	<ul style="list-style-type: none"> <li>Please explain why your agency is interested in this engagement. Maximum 250 words.</li> </ul>
Awards & Recognition	<ul style="list-style-type: none"> <li>List awards won over the past five years. Include the client &amp; project, award show, whether a National, Regional/Local or International show, award won (e.g. gold).</li> </ul>

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## LEGAL NOTES:

Late responses will only be accepted if an extension is provided 24 hours in advance, and there is reasonable cause for the extension.

All costs related to the submission of this RFI and any in-person meetings, must be assumed by the submitting firm. No expenses for these stages will be reimbursed.

No changes shall be made by the partner after the date set out above nor shall any comments be added unless clarification is requested by Five Secrets. Five Secrets will not be under any obligation to receive further information, whether written or oral, from any firm.

This RFI is not an agreement to engage the services of the firm. Five Secrets is not bound to enter into an agreement with any firm. Responses will be assessed in light of the evaluation criteria. Notice to proceed to the next step in the process shall not constitute an agreement nor give the firm any legal or equitable rights or privileges relative to the requirements set out in this RFI or in any subsequent RFQ/RFP. Five Secrets has no legal obligation of any kind whatsoever to enter into an agreement with a loyalty management firm. Five Secrets reserves the right, in its sole discretion, to reject any and all proposals made.

Final price and scope will be discussed and negotiated only with the successful agency. Failure to reach a satisfactory scope and price will result in the termination of negotiations and the second most qualified firm will be engaged in price and scope discussions. It is expected agencies will offer competitive pricing relative to the scope identified, and that you believe our approximate spend is in alignment with our business objectives as well as your agency's interests and ability to provide exceptional service.

Five Secrets reserves the right to modify the terms of this RFI at any time in its sole discretion. This includes the right to cancel this RFI/RFQ at any time and the right to cancel the partner search at any time without entering into an agreement.