

Executive Summary

The purpose of this document is to propose an integrated event solution for [REDACTED] participation in the National Association of Stock Plan Professionals (NASPP) October 21-24, 2008 at the Hilton Riverside in New Orleans, Louisiana. The following pages outline an initial recommendation including:

- Strategy & messaging
- Graphic elevations & design
- Two options for booth architecture
- Attendee journey for the show floor experience
- Concepts & attendee journey for the hospitality event

Objectives

As the most important event of the year for the [REDACTED], the NASPP conference offers a unique opportunity to strengthen relationships with existing clients, court top prospects and maintain awareness of the [REDACTED] brand. The proposed architecture, graphics and messaging plan aim to:

- Create a versatile, cost-effective solution for on-floor experiences
- Implement a campaign approach to this key conference: encompassing pre-event, onsite & post-event touchpoints
- Ensure the show-floor experience complements the hospitality event
- Enable meaningful conversations with clients & prospects
- Surface & capture new leads for [REDACTED]

Strategy

When developing messaging, creative design and marketing communication tactics, our goal is to engineer an attendee journey based on [REDACTED] objectives that delivers a holistic, integrated experience memorable for each attendee.

(Please note: the "attendee journey" is defined as all the event touch points pre-event, onsite and post-event.)

In order to emphasize [REDACTED] customer-centric, high-tech approach to Stock Plan Services, the booth experience immerses the attendee in first-hand accounts of success, elicits an emotional appeal and showcases sleek, modern technology.

When building the attendee journey, we based our recommendations on the following strategic measures:

Resonate with Target Audience: With an attendee profile of predominantly 25-45 year-old women hailing from middle-America or the Silicon Valley, NASPP attracts a conservative female audience that will respond to emotional cues and personal contact.

Implement Measurement Tactics: Through onsite data collection including raffles and pre-loaded USB devices, plus post-event tracking such as photo retrieval and online traffic, GPJ will be able to measure the attendee response and ultimate efficacy of [REDACTED] NASPP program.

Harness Testimonials: By incorporating powerful customer testimonial content into interactive, documentary-style video, [REDACTED] can highlight the true stories of its customers and the employees' lives their products have positively impacted. The resulting emotional appeal resonates with the attendee.

Showcase Technology: With 50-inch plasma (potentially touch-screen) technology as the delivery method for messaging and product demonstrations on the pedestal level, technology is center stage in the proposed architecture. An interactive coffee table interface in the middle of the booth encourages contact with the brand as attendees get off their feet.

Messaging

Our goal is to create messaging that will strengthen the attendees connection to [REDACTED] Stock Plan Services and make their experience at NASPP welcoming and personal — while representing [REDACTED] as a technologically-savvy, customer-centric partner. Our proposed messaging draws inspiration from [REDACTED] established brand identity “[REDACTED].” and supports [REDACTED] desire to leverage the awareness built from sponsoring the last three conferences and secure [REDACTED] position as a leader in the financial services industry.

Collaborate for Prosperity

A Clear & Concise Message

‘Collaborate for Prosperity’ is attendee-centric and a natural complement to the overarching [REDACTED] corporate tagline — “[REDACTED].” Essentially letting the attendee know that partnering with [REDACTED] today and leveraging their technological expertise will yield desired and prosperous results for their employees in the future, the message expresses a very [REDACTED]

This message reemphasizes the collaborative notion that [REDACTED] Stock Plan Services prides itself on taking innovative approaches to tactical and strategic business challenges. [REDACTED] is an organization where customers are heard, emerging technologies explored and sound, creative solutions implemented.

Alternate Messaging Options:

- **Option One:** Collaborate Today. Prosper Tomorrow.
- **Option Two:** Innovate. Collaborate. Prosper.

Attendee Journey



Overview

Collaborate for Prosperity

The efficient automation of technology meets the attentive, personal touch of white-glove service: that's the [redacted] difference. Technology paired with service is the message conveyed to attendees consistently and seamlessly throughout all pre-, onsite and post-event touch points. In the booth space, technology takes center stage while exceptional customer service serves as an underlying tone through the use of clean, white, modern design elements, generous ratios of [redacted] staff to attendees and advanced interactive equipment.

Conversely, the hospitality event focuses more on exemplary customer service, provided by a comprehensive team of courteous staffers attending to guests' every need, with technology providing a subtle backdrop for the event. By incorporating the dual themes of technology and service into every detail, [redacted] competitive differentiation provides a cohesive communication — visually and experientially, overtly and subliminally — throughout each stage of your guests' journey at the National Association of Stock Plan Professionals (NASPP) Conference.

Attendee Journey



Show Presence: Technology. Personalized.

From their initial invitation to their encounter on the show floor through to their post-event communication, attendees experience the [redacted] brand come to life: as the latest technology works hand-in-hand with personalized service.

Attendee Journey



Booth Space

Pre-Event Communication

- **Postcards and room drops** communicate the benefits of visiting the booth: Guests learn they will receive [redacted] branded USB drives upon visiting the booth, emphasizing content from the outset.
- **Postcard doubles as entry form:** Attendees may enter their contact information on this postcard and drop it off in the [redacted] booth for a chance to win a raffled prize.

Onsite Activities

Clean, technology-focused and modern, the booth space communicates [redacted] Stock Plan Services' commitment to provide clients with tomorrow's solutions, today. While customer service is a priority, advanced technological solutions shine as the center of attention inside the booth.

- **Open nature and welcoming feel** of the booth attract attendees to the space.
- [redacted] **branding** is reinforced through graphics and design throughout the space. The logos and taglines are displayed at the highest point of the towers on all four sides, offering a 360-degree view, visible from across the floor.
- [redacted] **USB drive**, attached to Mardi Gras beads goes beyond a branded take-away; pre-loaded with content, the key enables personalized interaction and content downloads from the demo stations in the booth.

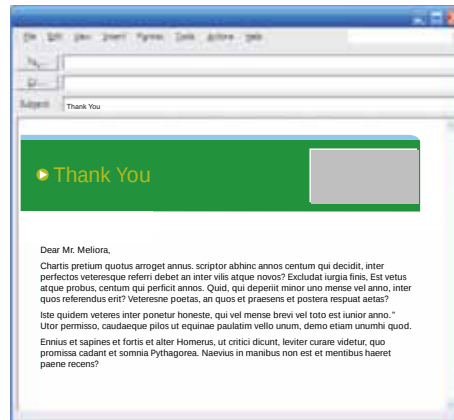


Attendee Journey



- **Information counter** welcomes guests into the space; providing a branding opportunity and a place for attendees to pick up their branded USB key giveaway, once their identity has been captured.
- **Private or semi-private meeting rooms** offers the opportunity for uninterrupted conversations with prospects and customers.
- **Central technology hub** provides a comfortable area for casual conversations to take place and an opportunity for attendees to interact with high-tech, self-service demos, such as an interactive coffee table with a touchscreen interface.
- **Dynamic video testimonials** bring customer case studies to life, creating resonance around specific customer pain-points, and offering an emotional hook as they play on impressive 50-inch plasma screens. These compelling stories will draw attendees into the booth, keep them engaged and make them want to become part of the [REDACTED] family.
- **High-tech, interactive displays** in the booth, such as a coffee table with horizontal touch-screen technology, highlight [REDACTED] Stock Plan Services' offerings.
 - Proprietary Platform
 - Plan Sponsor Work Station
 - Net Benefits
 - Global Reach — International Offerings
 - Financial Reporting
- **Data capture techniques** such as raffle entry, harnessing RFID technology (if available), and interaction with the onsite demos, facilitate post-event communication and add to [REDACTED] pool of potential prospects.

Attendee Journey



Post-Event Communication

- **Thank You phone calls** to attendees from their aligned regional sales representatives two to three weeks after the event create an opportunity to not only thank the attendee but also offer additional information regarding solution and service offerings.
- **Follow-up emails** drive to the event microsite and provide a cost-effective alternative for mass communication.

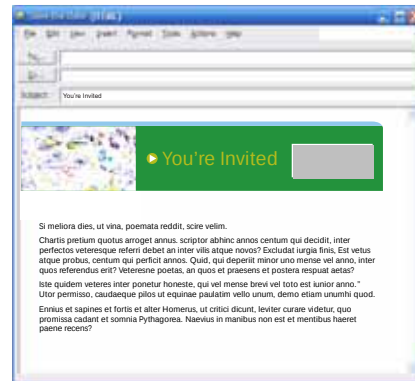
Attendee Journey



Hospitality Event: Art in Motion

With exquisite refreshments, a dynamic artistic performance and an exceptionally attentive service staff, your guests are treated as the most special of VIPs from the moment they arrive. The sparkling white décor matches the clean, modern tone of the technology-focused booth, but it's great service that sets the tone for this distinctive evening.

Attendee Journey



Hospitality Event

Pre-Event Communication

- **Emailed invitations** or evites for the hospitality event provide a sneak-peek of the entertainment and set the stage for an evening of fun and indulgence.
- **Personalized phone calls** placed by [redacted] account executives, extend a one-on-one invitation, adding an air of exclusivity.
- **Customized microsite**, featuring the look and feel of the elegant space and registration capabilities, provides additional opportunities to learn about the upcoming event.

Onsite Activities

From the moment guests enter, they are welcomed, catered to and made to feel special. Here, service is the focus and the theme, carried out throughout every inch of the space. Sociable rather than stuffy, this personalized attention gives your clients a taste of the exceptional level of service [redacted] customers enjoy, without being intrusive.

- **The clean, modern look and feel** of the booth is carried over into the hospitality space, but with an elegant twist.
- **Themed name badges** are dispensed to attendees at registration.
- **Amiable greeters** welcome each guest by name the moment they enter the space.
- **A “personal concierge”** personifies the [redacted] brand promise of exceptional service. He approaches each attendee upon entry to ensure their every need is met throughout the evening. Once the guests receives their first drink, this personal concierge warmly gives the attendee advice on how to get the most out of the evening and extends an offer to continue to serve them for the rest of their stay.

Attendee Journey



- **A spectacular artist performance** featuring a unique, high-energy process, will entertain spectators throughout the evening. The crowd watches as a masterpiece comes to life before their eyes as an artist pumps up the crowd while frenetically painting to energizing music. Amid the blur of the brush, his hand, the paint flying through the air, a portrait emerges. The fast-paced, choreographed performance plays out on a huge canvas and grips the audience until the amazing reveal.
 - A performer such as Brian Olsen (www.brianolsenart.com) combines studio art with riveting performance, animating [redacted] renowned patronage of the arts.
 - Alternatively, new Orleans-based artists, comedienne, singers or musicians could create an ensemble performance filled with local color that runs throughout the evening.
- **Paintings will be given away** as door prizes at the event — they cannot be bought, so there is no dollar value associated with the raffled items.
- **Elegant and abundant culinary treats** and beverages complete the VIP experience.
- **A photographer captures the excitement of the event** by capturing candid images of attendees, plus posed photo opportunities in front of New Orleans landmarks (via green screen). Posting the photos on a post-event microsite continues the momentum and facilitates follow-up communication.
- **Thoughtful details** extend the luxurious experience as [redacted] tends to guests' needs throughout the evening: restrooms are well-stocked with an array of amenities, drinks are cleared away immediately after they're emptied and attendees are regularly checked up on by their personal concierges.

Attendee Journey



Name Here
Street Address
City, ST, 12345

Dear Mr. Mellora,
Chartis pretium quonus arroget annus,
scriptor abhinc annos centum qui decidit,
inter perfectos veteresque referri debet an
inter vili atque novos? Excludat iurgia finis.
Thank You,
Investments

Post-Event Communication

- **After the hospitality event has ended**, guests will be talking about the experience for a long time. A few simple follow-up activities will sustain the momentum and provide [redacted] with an opportunity to maintain contact with these most important clients and prospects.
- **Custom thank you cards featuring the event's artist's work** are sent to these VIP attendees as a tasteful reminder of their experience in New Orleans.
- **Follow-up email features a link to a microsite** displaying all of the candid photos from the event. The site encourages viral transmission as visitors can download photos and forward them to colleagues. The site provides an opportunity for additional data retrieval through qualifying questions.

Who We Are

George P. Johnson, the leader in strategically innovative global Experience Marketing, was established in 1914. Our goal is to help clients forge better customer relationships through strategic marketing integrations, creative brand experiences, events and exhibits. GPJ has full-scale exhibit and environmental fabrication facilities in Auburn Hills, Michigan; Nashville, Tennessee; Torrance, California; Stuttgart, Germany; and Sydney, Australia. Additionally, GPJ has marketing offices in Boston and San Francisco; and international operations in London; Stuttgart; Tokyo; Beijing; Singapore; Sydney; and Bangalore, India.

Each year, top brands from around the world rely on GPJ to help them improve event performance, reduce costs and deliver results for their tradeshow, conferences, road shows, mobile marketing events and more. GPJ creates, manages and executes nearly 5,000 events per year — that's over 17 events each day, worldwide. In 2007 alone, GPJ:

- Contracted more than \$350 million worth of services
- Negotiated 4,500 hotel contracts and managed accommodations for more than 238,000 overnight guests
- Registered approximately 680,000 attendees and took care of all transportation needs
- Managed an event in virtually every major city around the globe, in 167 countries

What We Do

Creating Powerful Impressions, Deeper Relationships and Better Results

All of our events are strategically integrated, creatively conceived and efficiently executed to deliver measurable marketing results for our clients, worldwide. Our knowledge and experience allows us to offer a spectrum of event services from start to finish and at every point in between.

Global reach: With 17 GPJ offices around the world, we have the global footprint and local acuity to help you increase the effectiveness of your events and strengthen your brand worldwide.

Resources for true integration: Our expertise allows us to implement truly integrated event marketing, and our large inventory of rental exhibit properties means you have the resources needed to cost-effectively and consistently brand your events for use in any location around the globe.

Robust technology: Our robust, patented technology infrastructure, Global LINKS®, delivers powerful, integrated IT applications to manage every aspect of your program — from initial planning to content management, ROI measurement through post-event feedback.

Next Steps

We appreciate the opportunity to present our initial strategic thinking and creative concepts for [REDACTED] Stock Plan Services' participation in the 2008 National Association of Stock Plan Professionals conference. We are committed to creating the most effective and memorable event possible and look forward to your approval on this plan and meeting with you in person to officially launch this exciting endeavor.