Clearidy

Marketing Strategy & Growth Partner Proposal

A national launch plan built to introduce a new brand, educate a consumer who does not yet know the category, and find a repeatable, scalable way to acquire customers, without fear, and without waste.

Prepared for

Lori Selsberg, Co-Founder & CEO, Clearidy

Prepared by

Tysen Creager, Founder

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A Quick Note:

Lori,

Thank you for a refreshingly clear RFP! The line that stood out most was this one: you do not want Clearidy positioned as something people buy because they are preparing to die. That single constraint shapes everything in this proposal, because it is also the single hardest thing about this category and the reason most brands in it default to fear.

Here is the short version of how we would approach it. Clearidy is not selling legacy. It is selling *being the person who has it together*: the relief of knowing what you have, what it means, and what is missing, today, while you are healthy and in charge. The "people you love" benefit is the emotional payoff, rather than the opener. That reframing is what makes the topic feel useful and approachable instead of heavy.

We are a boutique firm, and we are proposing to you deliberately. The person writing this proposal is the person who will build your messaging, your landing pages, your measurement, your media, and your reports. We also bring something most marketing firms cannot: direct, current experience marketing estate-planning and trust-based services to the 50+ consumer, with measurable results.

Tysen Creager

Founder, Elevate Growth Solutions

1. Firm Information

Firm Name	Elevate Growth Solutions
Primary Contact	Tysen Creager
Title	Founder & Lead Growth Strategist
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Website	www.elevategrowth.solutions
LinkedIn	linkedin.com/in/tysen-creager
Location	St. George, Utah (serving clients nationally)
Years in Business	3, with almost a decade in marketing and web development
Approximate Team Size	Founder-led. One principal strategist plus a vetted bench of specialist contractors (design, video editing, PR). See Section 8 of this proposal.

Elevate Growth Solutions is a boutique growth agency built on a simple premise: small and early-stage companies deserve senior-level strategy and hands-on execution from the same person. We create fast, custom, conversion-focused websites and landing pages. We also run the full growth stack around them: positioning and messaging, paid search and paid social, SEO and AI-search visibility, email and lifecycle marketing, analytics, and plain-English reporting. Additionally, we deliver white-label technical work for other agencies, which keeps our execution standards high and our tooling current.

2. Observations

Before penciling any strategy, we did our homework on Clearidy, its founders, and the category. A few things shaped our thinking:

- **Clearidy launches with trust assets most startups do not have.** The DocuGuardian foundation (SOC 2 certification, encrypted storage, the DocuScore readiness assessment, LegacyIQ plain-English document explanations, and existing relationships with banks and credit unions) is a credibility head start. Our messaging plan uses those assets early and visibly, because trust is the gating factor in this purchase.
- **The founders are the story.** An attorney and SaaS operator who built this after watching a parent's documents become inaccessible during a health crisis is exactly the origin story this audience needs to hear. Founder-led content is not a "nice to have" here; it is the cheapest, most credible trust signal available in the first 90 days.
- **The buyer already knows the feeling; they do not know the category.** Almost every 50+ household has "the drawer" (or the file box, or the spouse who knows where everything is).

Nobody searches for a "life-critical document intelligence platform." They search for what to do when a parent is hospitalized, what documents they need before meeting an advisor, or how to organize insurance policies. Demand exists; it is just phrased as problems, not product names.

- **The competitive set defines the confusion we must avoid.** Digital vaults (Trustworthy, Everplans, Prisidio) store documents. Estate-document creators (Trust & Will and similar) generate them. Clearidy's distinct promise is understanding: know what you have, understand what it means, see what is missing. That is the position to own, and it is one none of the incumbents lead with.
- **The calendar is on Clearidy's side.** A Q4 launch lands on Medicare open enrollment (October 15 through December 7), National Estate Planning Awareness Week (the third week of October), year-end financial housekeeping, and the "get organized" resolution season in January. These are natural, non-morbid moments to talk about getting your information in order.

6. Our Proposed Approach

This section answers RFP items 6.1 through 6.8 in order. RFP sections 3 (Target Consumer), 4 (What We Are Looking For), and 5 (Marketing Objectives) are addressed in Section 2 above and in 6.3 below.

6.1 How we would launch Clearidy nationally

A national launch for a startup is not one big moment. It is a sequence of small, measurable bets that earn the right to a bigger budget. Our sequencing:

Phase	What happens	Why in this order
1. Foundation (Days 1–30)	Positioning and messaging platform, audience hypotheses, conversion path, measurement, creative production, SEO and lifecycle groundwork. Media limited to low-cost message testing.	Spending money before the funnel and tracking are proven wastes the most precious startup resource: learning per dollar.
2. Brand introduction (Days 20–45)	Founder-led story content, earned media pitching timed to National Estate Planning Awareness Week, first organic and creator seeding, email list warm-up with existing users.	Introduce the "why" before asking for the "buy." Earned and founder content are cheap, credible, and reusable as ad creative.
3. Channel testing (Days 31–60)	Structured tests across paid social, paid search, YouTube (recommended tier), and creator partnerships; 4–6 message angles, 2–3 formats each; weekly kill/scale decisions.	Find the intersection of segment, message, and channel that produces registrations and paid conversions at a cost that can scale.
4. Product launch push (Days 45–75)	Concentrate on the winning angles; launch the free readiness assessment as the primary call to action; publish the first SEO content cluster; activate the built-in "invite a trusted person" loop.	A visible launch moment is more effective once we know what to say and to whom.
5. Acquisition & expansion (Days 61–90+)	Shift 70%+ of media to the top two channels; scale creative winners; launch retargeting and lifecycle sequences; prepare the partner (advisor, bank, employer) channel for Q1.	Scale what works, nationally, with an honest CAC in hand.

What we would do first

Positioning, the conversion path, and measurement, in that order. The first two weeks are spent talking to users and prospects, writing the messaging platform, building landing pages that a 60-year-old finds effortless on a phone, and wiring registrations and paid subscriptions from Clearidy's backend into a single dashboard.

What we would deliberately not do initially

- No broad "awareness" media (TV, streaming, display networks, sponsorships) before we know which message converts. At a startup, brand is built through performance creative that people respond to.
- No twelve channels at once. We place three to four initial bets and add channels only when a prior one is producing or clearly failing.
- No affiliate program or large influencer deals before unit economics are known; both are expensive to unwind.
- No parallel B2B2C partner marketing sprint in the first 90 days. The advisor, employer, and financial-institution channel is a major Phase 2 opportunity (and DocuGuardian already has that muscle), but its sales cycles are long and it would dilute consumer learning. We keep it warm and prepare the materials.
- No fear-based creative, even if it tests well on click-through. It attracts the wrong buyer, damages the brand, and tends to convert poorly to paid.

6.2 How we would address the "death and dying" challenge

Our answer to "planning for life today + preparing the people you love for tomorrow" is a message architecture with a strict order: *today first, tomorrow second.* The everyday benefit opens every piece of communication; the loved-ones benefit closes it.

Layer	How it shows up
Lead with capability	"Know what you have. Understand what it means. See what's missing." Find any document in seconds. Understand what your policy actually covers. Walk into an advisor meeting knowing what to ask. Stop being the only person who knows where everything is.
Use life moments, not end-of-life moments	Retirement, a move or downsizing, Medicare enrollment, a new grandchild, a parent's hospital stay, a spouse taking over the finances, tax season. These are the moments people actually act on, and none of them require talking about dying.
Make it a project rather than a chore	"The Sunday afternoon project." A 20-minute readiness assessment. Progress bars, a score, a checklist. Organization is satisfying; estate planning is scary. We sell the satisfying part.
Earn the emotional close	After the practical benefit: "and the people you love will never have to guess." The founders' own story carries this better than any ad copy.

Layer	How it shows up
Urgency without fear	Calendar urgency (open enrollment, year-end, awareness week), relief urgency ("imagine this being done"), and social proof ("join families who have already organized"). Never "before it's too late."

Tone: warm, competent, a little wry, and respectful of the audience's intelligence. No hospital imagery, no urns, no sunsets. Relatable people at kitchen tables, on phones, getting a small satisfying thing done.

6.3 Who we would target first

Within the broad 50+ consumer, we recommend prioritizing three segments in order, with the first receiving the majority of the early budget. These are working hypotheses that the Days 1–30 research and Days 31–60 testing are designed to confirm or overturn.

Priority	Segment	Why first
1. The Household Organizer, 52–68, currently or recently caring for an aging parent	The person who manages the family's paperwork and has just lived through (or is living through) the chaos of a parent's documents. Often the "sandwich generation."	Highest pain awareness: they have seen what disorganization costs from both sides. Highest intent-to-act moment. Highly reachable on Facebook, Google, and YouTube. Strong word-of-mouth propensity.
2. The Recent Retiree Couple, 62–70	Newly retired, actively "getting affairs in order" as a retirement project; often on Medicare for the first time; consolidating accounts.	A natural, non-morbid trigger (retirement) and a defined season (open enrollment). Time and motivation to complete onboarding. Typically higher household assets and more documents.
3. The Adult Child Buyer, 40–55 (later)	Buys Clearidy for a parent, or sets it up with them.	Real demand, but the buyer is not the user, which creates onboarding friction. We test a "set it up together" angle in Days 61–90 rather than lead with it.

We would deliberately not lead with ultra-high-net-worth households (as your RFP is clear on), anyone under 50, or the "I need a will" searcher who is better served by an estate-document product and will churn.

6.4 What the first 90 days look like

Days 1–30: Build the machine

- **Discovery and research:** working session with the founders; 8–12 interviews with existing users and target prospects; competitive and message audit (what the vaults, estate-doc products, and password managers say, and what they leave open).

- **Positioning and messaging platform:** one core narrative, three audience-specific variations, proof points mapped to trust objections, and a language guide (words we use, words we never use).
- **Conversion architecture:** custom, fast, and accessible landing page system built for 50+ readability (larger type, high contrast, no clutter); the free readiness assessment framed as the primary call to action; trial and onboarding flow review; pricing page tests planned.
- **Measurement:** GA4 with server-side tagging, Meta Conversions API, Google enhanced conversions, and subscription events from Clearidy's backend so we can tie spend to paid customers, not just registrations. A single dashboard that compiles all data in one place.
- **Creative production:** founder-led video , 12–16 static and short-video ad variants across 4–6 message angles, and a lightweight brand-in-ads system so everything feels like Clearidy.
- **SEO and lifecycle groundwork:** technical baseline, a content plan around "what documents do I need" problem-clusters, and the welcome, trial-nurture, and abandoned-signup email sequences.
- **Media:** $2,500–5,000 of low-cost paid social used purely to test messages (which angle earns clicks and landing-page conversions); not to acquire customers yet.

Days 31–60: Find the signal

- Launch structured tests on Meta (Facebook and Instagram), Google Search, and, in the recommended tier, YouTube and a small set of creator partnerships.
- Earned media push timed to National Estate Planning Awareness Week; founder guest appearances on podcasts and newsletters serving 50+, caregiving, and retirement audiences.
- Weekly optimization cycle: kill losers, feed winners, ship new creative every week; landing-page A/B tests on headline, assessment framing, and pricing presentation.
- First SEO content cluster published; AI-search (ChatGPT, Gemini, Perplexity) visibility work begins, since Clearidy's buyers increasingly ask AI assistants these questions.

Days 61–90: Concentrate and scale

- Move 70%+ of media into the top two channel-and-message combinations; scale creative winners into new formats.
- Launch retargeting and lifecycle sequences aimed at the trial-to-paid step, which is where B2C subscription economics are usually won or lost.
- Activate the built-in growth loop: every Clearidy user is prompted to share access with a spouse, adult child, or trusted person. We design that invitation experience as an acquisition channel, with tracking.
- Prepare the Phase 2 partner channel: a one-page advisor/bank/employer offer and materials ready for Q1.
- Day 90 review: a written recommendation on channels, segments, messaging, creative, CAC targets, and the Q1 2027 budget.

How we would determine the initial media spend

Bottom-up, not top-down. Each test cell needs enough conversions to make a decision (we plan for roughly 30–50 registrations per cell as a minimum), and we size spend from expected costs per click and landing-page conversion rates observed in Days 1–30 message testing. Spend then earns its way up: a channel receives more budget only when its cost per paid customer is within the target we set together in week one, derived from Clearidy's price point and a payback period the founders are comfortable with.

Learning expectations & Clearidy decisions

By Day 90 we expect to know	So Clearidy can decide
Which segment responds fastest and which message wins within it	Where to concentrate Q1 budget and how to brief creative
Cost per registration, activation rate, trial-to-paid rate, and blended and per-channel CAC	Whether the acquisition model scales, and at what monthly spend
Which two channels earn scaled budget and which to drop or defer	The Q1 channel plan and media budget
Whether the free assessment or a direct trial converts better, and which pricing presentation wins	Product and pricing page decisions
Early retention signals from the first cohorts	A defensible LTV assumption for fundraising and planning

6.5 Which marketing channels we recommend

We are placing the initial bets where the 50+ consumer already spends time and already expresses this problem. Ranked by expected contribution in the first 90 days:

Channel	Why it earns an initial bet	Role in first 90 days
Paid social (Facebook and Instagram)	The single best place to reach and test messages with adults 50+, with rich creative formats, lookalike audiences built from existing users, and fast learning cycles.	Primary testing and acquisition engine. Largest share of media.
Paid search (Google)	Captures existing intent phrased as problems: organizing important documents, what to do when a parent is hospitalized, digital vault comparisons, competitor names. Lower volume, high intent.	Second bet. Always-on from Day 31; Performance Max considered after Day 60.
Email and lifecycle	Owned, cheap, and where trial-to-paid conversion happens. Also the channel this audience trusts most. We have consistently produced 33–54% open rates for homeowner and 55+ audiences.	Built in Days 1–30; drives activation and conversion throughout.

Channel	Why it earns an initial bet	Role in first 90 days
SEO, content, and AI-search visibility	Compounding. The "what documents do I need" question space is large and under-served with honest, plain-English answers. AI assistants are becoming the first stop for this audience's questions.	Foundation in Days 1–30; first cluster live by Day 60. Payoff is Q1 onward.
Founder-led content and earned media	An attorney-founder with a real story is Clearidy's most credible asset. Podcasts, newsletters, and press serving retirees and caregivers are receptive and inexpensive.	Brand introduction (Days 20–45) and ongoing. Also feeds ad creative.
YouTube (recommended tier)	Adults 50+ consume long-form educational content on retirement, caregiving, and money. Pre-roll on that content, plus organic explainers, reaches them in a learning mindset.	Tested Days 31–60; scaled if cost per registration is competitive.
Creator partnerships (recommended tier)	Micro-creators in retirement planning, caregiving, and personal finance for 50+ deliver borrowed trust at modest cost. Test 4–6, scale 1–2.	Tested Days 31–60.

Deferred: direct mail (this audience responds to it, and we have produced 6–8% QR-scan rates on mail to homeowners, but it needs a proven offer and LTV first; test in Q1), affiliate and referral incentives (after unit economics), strategic partnerships (Phase 2, as above), TV and streaming (not before a proven message), and TikTok (wrong audience at launch).

6.6 How we would approach creative and messaging

Step	How we do it
Develop messaging	Interviews and the founders' story feed a messaging platform: one core narrative, three segment variations, proof points mapped to objections (security, "is this for me," effort, price).
Test messaging	Cheap, fast, real: the same landing page with different headlines run against paid social traffic; ad-as-survey concepts; click-through and landing-page conversion tell us which angle resonates before we invest in production.
Develop creative concepts	Three campaign concepts built on the winning angle (for example: "The Drawer," "The person who has it together," and "Know what you have"). Each concept ships as static, carousel, and short video.
Determine what resonates	Weekly creative scorecards: hook rate, click-through, cost per registration, and trial-to-paid by concept, angle, and format. We keep what earns paid customers, not just clicks.
Create advertising and content	Founder-led video, testimonial and UGC-style pieces, animated explainers of the assessment and plain-English document explanations, educational content for SEO and email, and press materials.

Step	How we do it
Test calls to action and landing pages	Continuous A/B testing of the primary call to action (free readiness assessment versus direct trial), page structure, trust-signal placement, and pricing presentation, using GA4 funnels and session recordings.
Improve conversion over time	A standing weekly CRO cycle. Every week ships at least one test. Winners are documented so the learning compounds.

What we do directly and what requires outside vendors

Performed directly by EGS: strategy, research, positioning and messaging, copywriting, landing page and website development, ad account setup and management across all channels, SEO and AI-search work, email and lifecycle marketing, analytics and dashboards, static design, light video editing, and all reporting and client communication.

Outside vendors (managed by EGS, billed at cost, itemized in the pricing section): professional video production beyond founder or phone-shot footage (recommended tier includes one shoot day), press-release distribution, paid creator fees, and occasional specialist design or video-editing overflow. No strategic or client-facing work is outsourced.

6.7 How we measure success

One principle above all: we report the numbers that tie to paying customers, and we say plainly when a platform's "conversions" cannot be reconciled to real ones. We have paused our own campaigns on that basis.

What	How we measure it	First-90-day KPI
Customer acquisition	Registrations, activations (assessment completed or first document added), and paid subscriptions from Clearidy's backend, by source.	Paid subscribers per week trending up; activation rate above 50% of registrations.
Cost per acquisition	Cost per registration, cost per activation, and CAC per paid subscriber, blended and by channel, angle, and creative.	At least one channel-and-message combination with CAC inside the target we set in week one.
Conversion	Landing-page conversion rate, registration-to-activation, trial-to-paid, with A/B tests logged.	Landing-page conversion improving week over week; a winning call to action identified.
Engagement	Activation rate, documents added, assessment completions, trusted-person invitations sent and accepted, email open and click rates.	A measurable invitation loop (invites per user, acceptance rate).
Channel performance	Spend, reach, click-through, cost per click, cost per registration, CAC, and assisted conversions per channel;	Clear scale / hold / stop decision for every channel tested.

What	How we measure it	First-90-day KPI
	incrementality checks where volume allows.	
Return on marketing spend	First-90-day subscription revenue against media and total program spend; projected LTV:CAC once early retention is observed.	A defensible payback estimate to plan Q1 against.

Reporting Clearidy would receive

- **Live dashboard (24/7):** a central view of the full funnel and every channel, connected to your ad accounts, analytics, and subscription data.
- **Weekly (first 90 days):** a one-page scorecard plus a 30-minute working call: what we tested, what we learned, what changes this week, what we need from you.
- **Monthly:** a written report with a short video walkthrough covering results, decisions, and next month's plan.
- **Day 30, 60, and 90 decision reviews:** structured recommendations so the founders can make budget and direction calls with confidence.

6.8 Concerns and risks we see, and how we would address them

Risk	How we address it
Procrastination is the real competitor. Most people agree they should do this and do nothing until a life event forces it.	Target trigger moments (caregiving, retirement, moves, enrollment season) rather than the general population; make the first step tiny (a free readiness assessment); use calendar and relief urgency; build the "get organized" narrative rather than the "estate planning" narrative.
Trust and security anxiety. Uploading wills and financial documents to an AI startup is a big ask for a cautious audience.	Lead with SOC 2, encryption, and the attorney-founder story; a transparent security and privacy page written for humans; testimonials early; "not a replacement for professional advice" stated proudly, because honesty is the trust signal; offer a guided, no-upload starting path if the product supports it.
Category confusion. Prospects may lump Clearidy with digital vaults, password managers, or will-makers.	Own "understand what you have and what is missing." Comparison content that is fair to competitors and clear about the difference. Search campaigns on competitor terms with that distinction front and center.
Onboarding friction for older users. Effort and tech anxiety kill conversion after the click.	Accessible landing pages and email; a first session that produces a visible win in under 20 minutes; concierge or phone-assisted onboarding for early cohorts; session recordings to find and fix friction weekly.
Weak or misleading attribution. A considered purchase with a multi-week decision cycle will not	Server-side tracking, subscription events from the backend, "how did you hear about us" on signup, UTM discipline, and holdout tests once volume allows. We report unknown and direct honestly rather than forcing credit onto a channel.

Risk	How we address it
be captured by platform pixels alone.	
Subscription fatigue and price sensitivity among retirees.	Test annual versus monthly framing and value anchoring ("less than one hour of an advisor's time"); position the product as a household utility, not another app.
Two brands. Clearidy is launching from a DocuGuardian foundation.	Settle the brand architecture and migration plan in week one: which brand consumers see, redirects, reviews, listings, and search equity. Technical migrations of this kind are core EGS work.
Founder bandwidth. Startups stall when marketing waits on approvals or content.	We do the heavy lifting; the founders commit to a weekly 30-minute call, 48-hour approvals, and roughly two hours a month on camera. Everything else is ours.

7. Relevant Experience

7.1 Our most relevant successes

Voyant Legal: estate planning for the 50+ consumer, where trust is the purchase

Why it is relevant: a trust-driven, estate and legacy category, sold to the same 50+ consumer Clearidy is targeting, with a multi-location practice competing against larger firms.

The challenge: an established estate-planning firm with a strong reputation but a website that was invisible for its core services: failing Core Web Vitals, analytics undercounting organic traffic by roughly 30 to 1 because of duplicated tracking, no structured data, and pages that ranked 101+ for their own city-and-service terms.

What we did (May 2026 to present): rebuilt the technical foundation in a 30-day sprint (speed, tracking, schema, titles, and metas), then ran an ongoing program of conversion-focused page builds, plain-English FAQ content, Google Business Profile management across four offices, monthly reporting, and, when Google's ad system wrongly flagged the site, a root-cause investigation that restored their Local Services Ads.

+41% organic sessions month over month in July 2026, the best month on record	**+49%** Google Search clicks month over month; CTR 1.1% to 1.5%	**12.7 → 10.9** average Google position; indexed pages up ~40% since April
~3.5% website conversion rate on organic traffic	**#1** for "estate planning lawyer" in two of four markets; page one (per Ahrefs) statewide for "estate planning attorney utah"	**+30%** Google Business Profile website clicks; calls +14% across four offices

Gardner Energy: creating demand for a service nobody was searching for

Why it is relevant: a product (an annual solar system performance check) that customers did not know they needed, sold to homeowners, many of them 50+, through education and a low-friction first step. Directly answers RFP 7.2.

The challenge: a Utah solar installer wanted to generate service and upgrade revenue from 3,500 past customers and 500 customers with known system issues. Nobody searches for a solar performance check; the need had to be surfaced.

What we did: designed the campaign strategy end to end: two segments with distinct messaging ("your panels have been working hard" for the base; "we see a potential issue" for known-issue systems), a six-email phased sequence with A/B subject lines, direct mail with QR codes to a dedicated landing page, lead-capture pages, and an AI-assisted reply-triage system so the client's team could keep up.

33–37% email open rates versus a 20–25% home-services benchmark	**6–8%** direct-mail QR scan rate versus a 1–3% industry norm	**30+** service requests in weeks two and three alone from roughly 1,500 touches

The most telling result was not a metric: the client asked us to pause week-four outreach because their team needed time to catch up on inquiries.

Dressler Detours: a considered, trust-based purchase by affluent 55+ travelers

Why it is relevant: an educational small-group travel company selling a high-ticket, discretionary, trust-based purchase to a predominantly 55+ audience, with owned channels doing the heavy lifting.

The challenge: a beloved brand with a loyal alumni base, thin organic visibility, an unsegmented email list, and no reliable line from marketing activity to inquiries and bookings.

What we did (January 2026 to present): technical and on-page SEO, citation and authority building, Google Business Profile management, email marketing to 1,000+ subscribers, blog content in the founders' literary voice, and, this fall, a referral program, founder-led social content, and print collateral for an alumni event.

50–54% email open rates and 2.9–6.5% click rates across campaigns to 1,040 subscribers	**+25%** organic sessions month over month (April 2026) with tracked pages up from 142 to 167	**14.4% → 8.3%** quick-back (bounce-back) rate after internal linking and intent fixes

7.2 Creating demand for a product consumers were not actively searching for

Yes. The Gardner Energy campaign above is the clearest example: a service with essentially zero search demand that produced dozens of qualified service requests in weeks by (1) segmenting on the customer's actual situation, (2) leading with a specific, useful observation rather than a pitch, (3) making the first step nearly effortless, and (4) using owned and direct channels where a message can be delivered in context. The Clearidy launch plan applies the same logic: trigger-moment segments, a useful first step (the readiness assessment), and channels where we can educate before we ask.

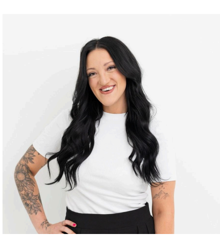
8. Your Team

8.1 Who would actually work on Clearidy

The team you meet in this proposal is the team that does the work. There is no handoff after the sales process.

Person	Role on Clearidy	Responsibilities
Tysen Creager, Founder, Elevate Growth Solutions	Lead strategist and day-to-day contact	Owns strategy, research, positioning and messaging, landing pages and web development, paid media across all channels, SEO and AI-search, email and lifecycle, analytics and dashboards, and all reporting and communication. Personally on every weekly call. Background includes a large Utah marketing organization before founding EGS to give small and early-stage companies senior, accountable service.
Sara Mecham, Graphic Designer (contract; upon availability) + Tysen Creager	Static and brand-in-ads design	Ad creative, landing-page visuals, social and email templates, print collateral. Sara and Tysen both have a background in UX, UI, branding, and graphic design. Sara has worked with us before on several graphic design projects.
TBD; Video Editor (contract)	Short-form and founder video	Editing founder-led and testimonial footage into ad and organic formats.
Minaz Khajah, PR / Media Relations (contract, recommended tier)	Earned media	Pitching podcasts, newsletters, and press serving 50+, caregiving, and retirement audiences. Minaz has a background in marketing and media relations and has worked with our team for several PR projects.

Outsourcing: specialist contractors handle design, video editing, and media relations under Tysen's direction, representing roughly 15–25% of total hours. All strategy, media management, analytics, and client communication stay in-house. We would tell you in advance if any additional specialist were needed.



Tysen Creager, Founder & Lead Growth Strategist

9. Working With Clearidy

9.1 What we would need from you

- **Access:** product demo accounts; brand assets; ad accounts (or permission to create them in Clearidy's name; you own all accounts and data), Google Analytics and Search Console, Meta Business Manager, domain and hosting or the web repository, the email platform, and subscription events from your backend (Stripe or equivalent) for attribution.
- **Knowledge:** existing DocuGuardian user data, surveys, support tickets, and any prior research; introductions to 8–12 users and prospects for interviews; the security and compliance facts we can state publicly.
- **Decisions in week one:** brand architecture (Clearidy and DocuGuardian), pricing and trial structure, target CAC and payback, and the single decision-maker for approvals.
- **Content:** a founder willing to be on camera and on podcasts (roughly two to three hours per month); rapid legal review of claims (an attorney-founder makes this fast).
- **Cadence:** a weekly 30-minute working call for the first 90 days and approvals within 48 hours so testing does not stall.

Expected involvement from Clearidy leadership

Heavier in weeks one through three due to discovery, positioning, and approvals. After that it will likely drop to about one hour a week: the weekly call, quick approvals, and periodic content sessions. We design the engagement so the founders can stay focused on product and partnerships.

10. Pricing and Investment

You asked us not to ask for a budget, so here is what we believe is realistically required. Two levels, both built to launch responsibly and learn quickly. Media is billed directly to Clearidy's ad accounts at cost with no markup; you own the accounts and the data from day one.

Recommendation

We recommend the **Recommended 90-Day Investment**. The difference is not the fee; it is the speed and certainty of learning. More creative variations and more media per test cell mean statistically meaningful decisions by Day 60 rather than Day 90, plus YouTube, creator partnerships, and a real earned-media push, which are the channels most likely to produce a step-change for a new brand with the 50+ audience. The Minimum Viable level is a responsible launch; it simply answers fewer questions in the same 90 days.

10.1 Complete pricing for the first 90 days

Cost	Minimum Viable	Recommended
Strategy / onboarding (one-time)	$6,500	$8,500
Monthly agency / management fees	$5,000 × 3 = $15,000	$7,500 × 3 = $22,500
Creative / content production	$4,000	$9,000
Paid media spend (at cost, no markup)	$20,000 (≈ $2.5k / $7.5k / $10k by month)	$40,000 (≈ $5k / $15k / $20k by month)
Technology / software	$1,500 (≈ $500 / month)	$2,000 (≈ $667 / month)
Outside vendors	$1,500 (design and video-editing overflow)	$5,000 (one video shoot day, press-release distribution)
Other anticipated expenses	$1,000 (PR and creator seeding)	$4,000 (creator partnership fees)
Total 90-Day Investment	**$49,500**	**$91,000**
Agency fees as a share of total	43%	34%

Estimates and exclusions. Paid media, software, outside vendors, and "other" lines are estimates billed at actual cost; we will not exceed them without written approval. Not included: product or app development, customer support, brand identity or logo design (we assume Clearidy's identity is complete), legal review, professional video beyond the recommended tier's one shoot day, a retained PR firm, and large-scale direct-mail printing (quoted separately if we test it in Q1). Sales tax, if applicable, is additional.

What materially changes between the two levels

Dimension	Minimum Viable	Recommended
Channels tested	Paid social, paid search, email, SEO foundation, founder content	All of the above plus YouTube, 4–6 creator partnerships, and an earned-media push with press distribution
Creative	12–16 ad variants across 4 angles; founder phone-shot video	30–40 ad variants across 6 angles; one professional shoot day plus founder and testimonial video
Testing speed	Decisions on 2 channels and 1–2 segments by Day 90	Decisions on 4 channels and 3 segments, most by Day 60; Days 61–90 spent scaling
Media	$20,000, weighted to month three	$40,000, enough to reach decision-grade volume per test cell
Expected learning	Validates the core message, the primary segment, and one scalable channel	Everything at left, plus a second scalable channel, a working creator playbook, and early retention and LTV signal

10.2 The relationship after the first 90 days

Ongoing monthly agency fee	$5,000–7,500 depending on the scope Clearidy chooses at the Day 90 review (we expect $6,500 for the recommended scope: media management across two to three channels, weekly creative, CRO, SEO and AI-search, lifecycle email, and reporting).
Recommended ongoing media budget	$15,000–30,000 per month, scaled against the CAC target. We will recommend a specific number at Day 90 based on observed unit economics.
Contract requirements	A simple services agreement with a written scope. Clearidy owns all accounts, creative, data, and code.
Minimum term	90 days (the launch program). Month-to-month thereafter.
Cancellation	30 days' written notice after the initial 90 days.
Other recurring costs	Software at cost (roughly $500–700 per month), quarterly creative refresh (roughly $2,000–4,000), and creator or vendor fees as approved.
Payment terms	100% of the strategy/onboarding fee to begin; monthly fees invoiced at the start of each month, net 14.

11. Why Elevate Growth Solutions Is the Right Partner

Measured against what you said matters most:

What matters to Clearidy	What we bring
Proven success	Measurable growth for an estate-planning firm (+41% organic sessions, page-one statewide rankings, ~3.5% conversion), demand creation from zero search volume (30+ service requests in two weeks), and owned-channel results with homeowner and 55+ audiences (33–54% email open rates).
Understanding of your customer	We market to the 50+ consumer every week: estate planning, retirement-age travelers, homeowners. We know how they read, what they distrust, and what makes them act. We also know the category's trap (fear) and how to avoid it.
Strategy and execution	Everything in this proposal is built and run by the person who wrote it: positioning, custom landing pages, media, analytics, email, and reporting. No agency layers, no translation loss, and changes ship in days.
Team	Senior attention by design. You will always know who is working on your account, and you can reach that person directly.
Measurement	One dashboard, weekly updates, monthly reports. We have a track record of transparency and integrity with our clients; if something isn't working, we tell you and we pivot.
Cost	Boutique economics: a larger share of every dollar goes to media and learning instead of overhead, with fees that scale only when results do.
Speed and flexibility	We can begin within one week of selection, run the first message tests inside 14 days, and offer a 90-day term with month-to-month thereafter.

Clearidy is addressing a very human problem with a product that can make life easier today and dramatically easier for families tomorrow. It deserves a launch that is thoughtful about every dollar, honest about every number, and relentless about finding what works. That is the work we love, and we would be proud to do it with you.

Suggested next steps

1. A 45-minute follow-up conversation to walk through this plan and answer questions.
2. A short working session with the founders to align on brand architecture, pricing, and the CAC target.
3. Agreement and kickoff within one week of selection; first message tests live by Day 14.

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