COHEN'S Fashion Optical® | leap group

Thank you

for allowing us to participate in your review process.

We are energized by the idea of being able to work with Cohen's Fashion Optical. Consumer and marketing challenges, such as yours that you outlined, get us motivated to make an impact and work with you to solve.

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We have a saying here:

It's time to take a big Leap forward.

Cheesy? Yes. Impactful? Absolutely.

Why is Leap Group a perfect fit
for Cohen's Fashion Optical?

Simple.

You need results. We drive results.

What makes us different?

In simplest terms, we are an advertising and media holding company for mid-sized and challenger brands.

We are a boutique advertising & media holding company.

Specialization:
Having specialized agencies allows us to provide a depth of expertise usually only found at large holding companies and agencies. No generalists here.

Scalability:
As much or as little as you need. Need just media? A video or a complete new website? Maybe a full service AOR? We got you.

Centralization:
Our centralized operations feel like working with a boutique agency and allow us to all share the same philosophy: market less, matter more.

Collaboration:
Our agencies complete not compete – collaborating to make all of our work stronger. And because collaboration is a core part of our own identity, collaborating with your team is second nature.

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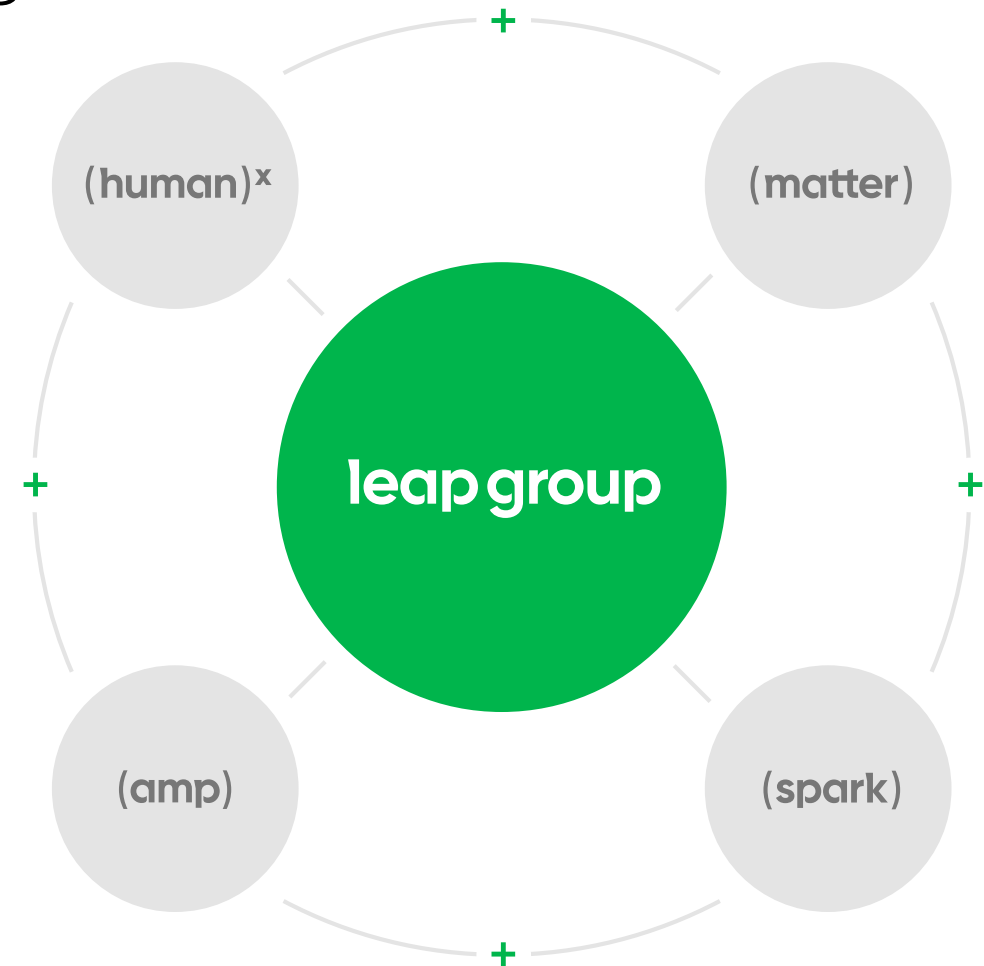
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Insights + Growth Agency

Business Intelligence with real-world relevance. We use advanced analytics, our in-house, PH.D led research team, and a human-centered approach to uncover what others miss and deliver actionable insights for real business growth.

Consumer + Market Research

Competitive + Category Intelligence

Customer End-to-End Experience Consulting

Integrated Marketing + Loyalty

Marketplace + E-commerce Strategy

Data Strategy + Consulting

Advanced Analytics + Modeling

Data Engineering + Integration

Visualization + Reporting

Predictive Modeling

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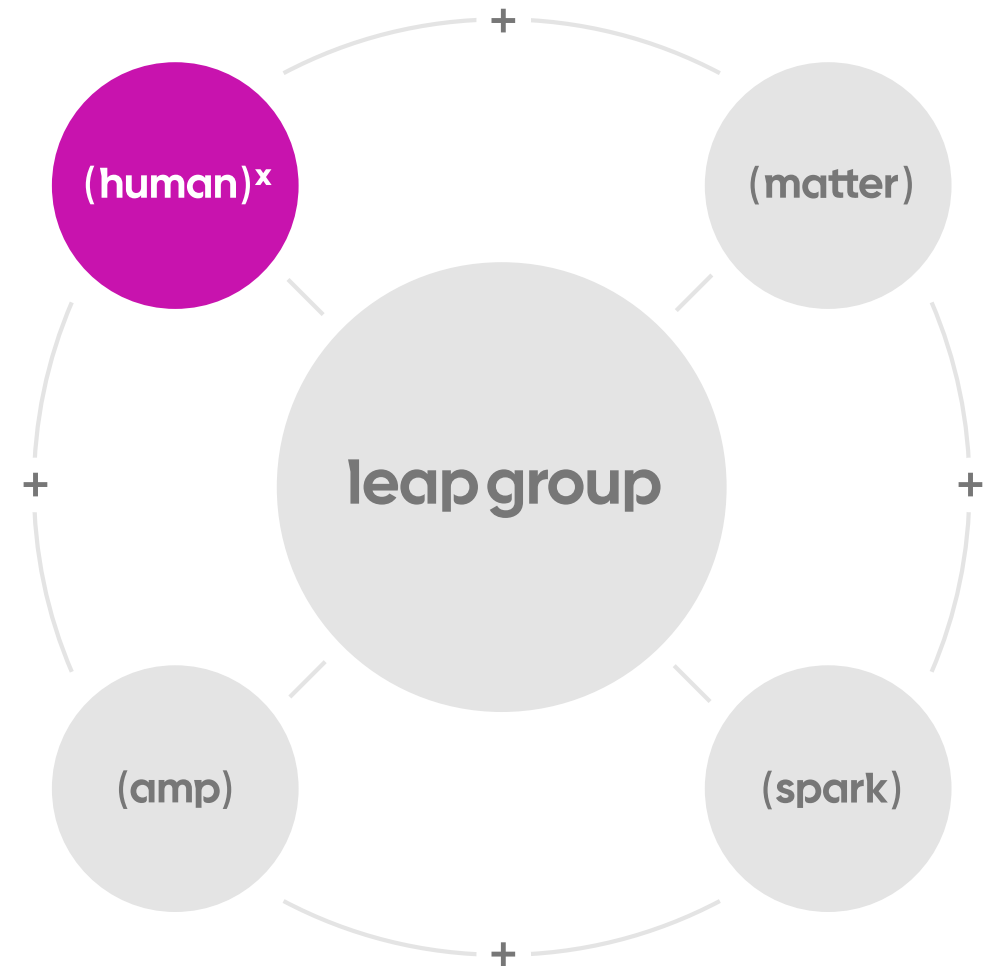
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Creative Agency

Creative that resonates. We exist to make your brand matter more to real people making real decisions in the real world—and deliver real, measurable results.

Storytelling

Brand Strategy + Activation

Advertising Campaigns

Design

Packaging

Print + Design Collateral

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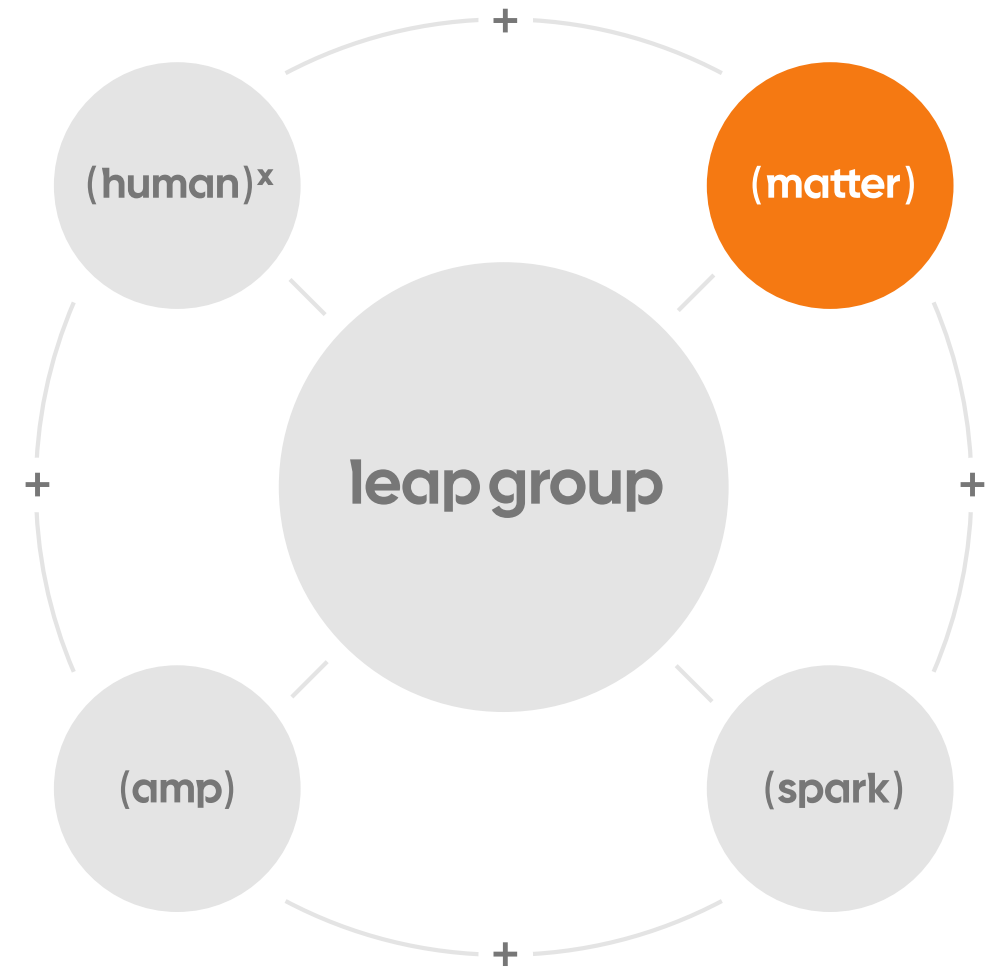
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Production Studio

Big ideas. Bold content. No drama. We bring your vision to life with nimble production and cinematic execution to deliver stories that stick and content that connects.

Design + Illustration

Content Production

Scoring, Sound Design + Mix Video

Production

Post-Production

Photography

Motion Graphics + Animation

Social Content

Experiential + AR/VR

Web + App Development
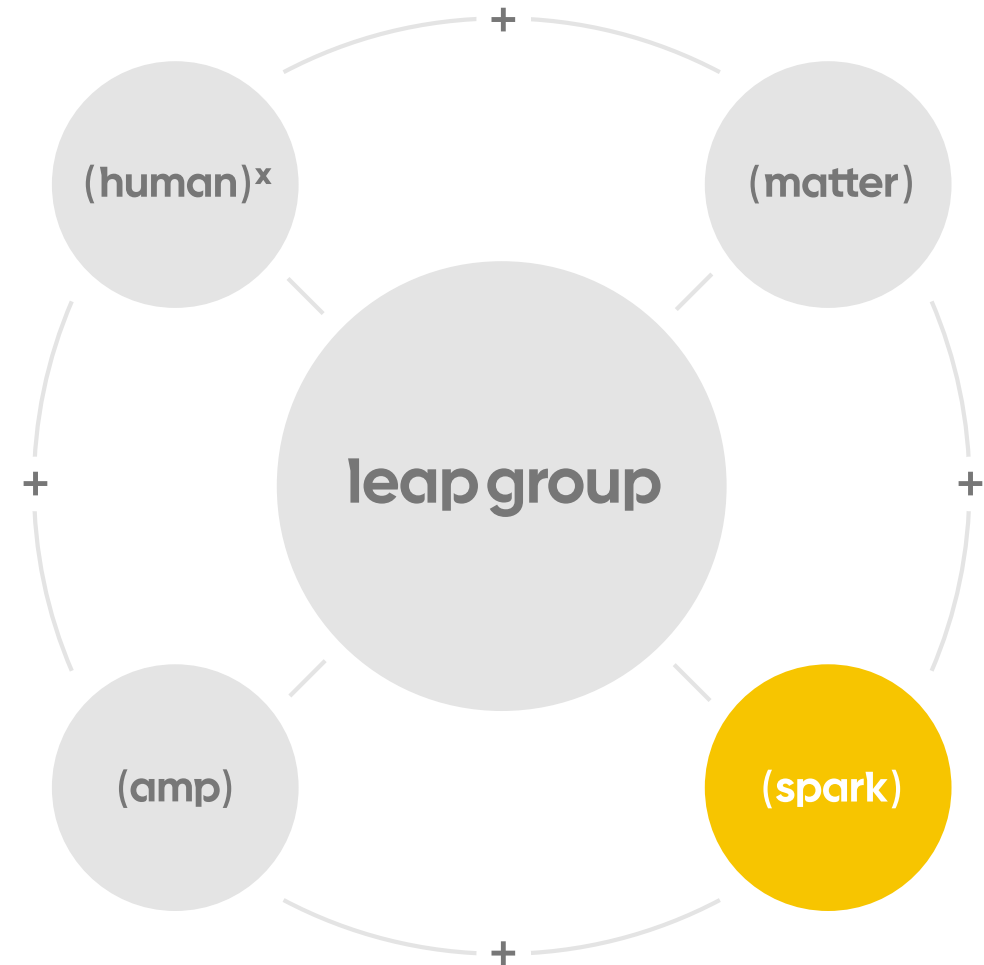
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Media +
Search Agency

Messaging that resonates. We use smart media, sharp creative, and real-time optimization to reach the right people at the right moment for meaningful engagement and measurable results.

Media Strategy + Consulting

Media Planning + Buying

Programmatic

Social + Influencer

Community Media Management

Demand Generation

Paid Search

Paid Social

Paid Media for Recruiting

Consumer Insights

Analytics + Reporting

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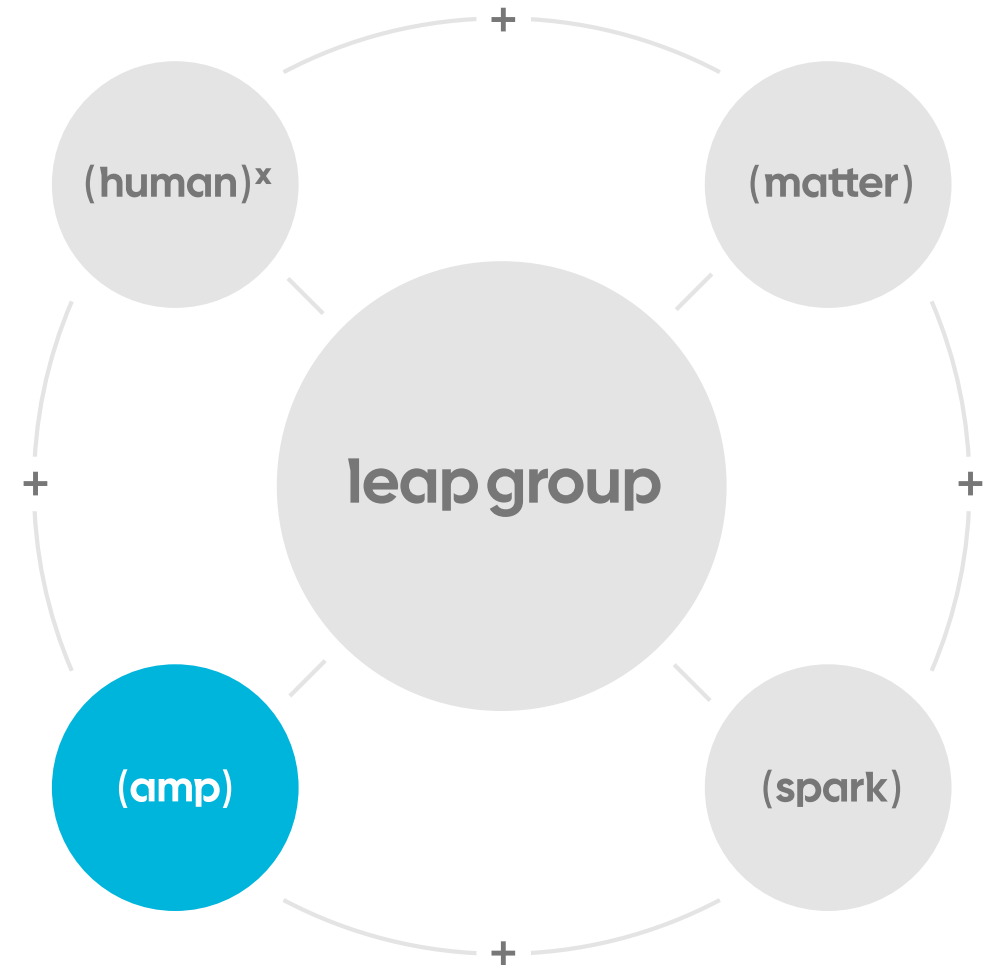
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Years in Business
Independently Owned

4

Specialized
Agencies

4

Locations
Louisville • Indianapolis
Chicago • Cincinnati

125

Subject Matter
Experts

Named to the top 50% of America's **fastest-growing companies in 2023 & 2024** – proving our model works.

Experience you can trust

CPG + Retail

E-Commerce + Tech

Financial + Insurance

B2B + Manufacturing

Food + Beverage

Healthcare

Restaurants

Sports + Active Lifestyle

Non-profit

Government

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Franchise vs. Corporate-Owned Marketing Dynamics

Ownership Structures Shape Strategy

Marketing strategies diverge sharply between franchise and corporate-owned models due to differences in operational control, budget management, and decision-making flow.

Franchise Models

- Independent operators license the brand, often with varying marketing expertise, local autonomy, and budget commitment. Corporate may guide—but not directly control—execution.

Corporate-Owned Multi-Locations

- All locations are managed under one entity. Strategy, creative, media, and performance tracking are centralized, enabling consistent execution and more efficient scale.

Brand Management Spectrum

We've seen it all—from brands that centralize every message and asset, to those that empower local operators with broad autonomy:

Tightly Controlled Systems

- HQ owns the brand narrative and campaign execution. Franchisees or store managers act as brand implementers—often with templated or mandated creative.

Decentralized Networks

- Franchisees operate as individual marketers. In these environments, corporate sets guardrails while local partners control spend, channels, and execution—often needing direct support.

Our Experience Across Ownership Models

We Operate Across the Spectrum

Our client base includes:

- Fully franchised systems (e.g., national tax prep, tanning, or fitness brands)
- Corporate-owned multi-locations (e.g., QSR, healthcare, and specialty retail chains)
- Hybrid models where brands:
  - Own domestic stores but franchise internationally
  - Operate a dual system where a core portfolio of corporate-owned locations is surrounded by a broader network of franchisees.

How We Adapt

We understand the nuance of each model and adjust how we support based on structure:

Corporate-Owned Systems

- We act as an extension of the brand team
- Build campaign toolkits, manage national media, optimize omnichannel presence
- Create consistent, brand-forward marketing across every location

Franchise-Led or Hybrid Models

- We support both corporate and individual franchisees
- Manage co-op budgets and regional media
- Educate and empower local marketers to execute effectively within brand standards
- Roll out national promotions with flexibility for local adaptation

The Result

We bridge the gap between brand strategy and local execution—whether we're rolling out a national rebrand across 600 locations or supporting a single franchisee with their first paid media buy. This balance of structure and flexibility is what drives results in complex models.

Navigating Co-Op Media Funding Models

Understanding the Balance of Power and Spend

In co-op marketing models, media funding is shared between corporate and local operators—
requiring careful coordination, education, and execution support.

How We Work Within Co-Op Structures

Strategic Planning Support:

- We help corporate teams define national campaign windows, messaging priorities, and budget tiers—then create media playbooks that local operators can align to.

Franchisee Enablement:

- We educate and equip franchisees with the tools they need to participate:
    - Budget recommendations based on market size
    - Channel-specific tactics (e.g., local search, social, OTT)
    - Step-by-step media kits and promotional timelines

Co-Funded Media Activation:

- We manage and deploy media buys funded by both corporate and franchisees.
    - Corporate may contribute a base investment or matching percentage
    - We handle the logistics—planning, creative adaptation, media placement, and performance tracking

Performance Transparency:

- We provide clear reporting back to both corporate and franchisees—showing ROI by market and ensuring accountability on all sides.
- Our dashboards often show:
    - Spend by party (corporate vs franchisee)
    - Channel mix and creative usage
    - Store-level results and optimizations

Why It Matters

In co-op models, success depends on trust, clarity, and results. We play the neutral, strategic partner—driving alignment, simplifying execution, and maximizing return for both the brand and the local business owner.

Franchise Experience

Multi-Location Experience

Key Tech

Social Media

Key Tech

Search

Key Tech

Media Buying & Research

Key Partnerships

Meta

Meta
Business Partner

Leap Group is proudly recognized as a Meta Business Partner. This partnership affords our agency the following benefits that we utilize for our client engagements:

- Dedicated Meta Account Manager

- Prioritized VIP Support for our clients

- Direct training for Leap Group staff

- Access to beta programs and what's new in the Meta family of apps and services

- Direct creative consultations with Meta support

Key
Partnerships

Google

Leap Group is proudly recognized as a Google Partner. This partnership affords our agency the following benefits that we utilize for our client engagements:

- Product education & certifications

- Consumer insights reports

- Account & technical support

Key Partnerships

Microsoft

Microsoft | Advertising

Partner

Leap Group is proudly recognized as a Microsoft Ads Partner. This partnership affords our agency and clients exclusive access to Microsoft Advertising resources and more, such as:

- Free training and certifications, industry insights

- Partner community

- Account & technical support

We're authentically Midwestern and proudly independent.

We're as talented as anyone in New York or LA, we just don't feel the need to talk about ourselves all the time. We're prone to politeness, with an aw-shucks attitude about the awe-inspiring work we create for our clients.

We're honest, hardworking and genuine. We're friendly, fun, and approachable. We have tattoos and thrifted threads and we still love eating at Pizza Hut unironically. We are gay and straight, conservative and liberal, dog people and cat people and family people and get-that-baby- away- from-me people.

And you know who that makes us like? Most of the country. We have a personal understanding of how the majority of consumers actually live, work and play - and what really matters to them.

Maybe that's why we've remained independently-owned for 25 years and counting. It means we make our own decisions. Put our clients first in everything we do. And make those meaningful connections between our clients and their consumers.

Market Less.
Matter More.

We exist to make brands relevant—to connect real people with the products and services they actually want in a smart, beautiful, and meaningful way—and create a world with less noise, less BS, and more of the stuff that really matters.

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Logic + Magic

We're driven by understanding how people think and make decisions. And the way we do that is through logic and magic.

Armed with insights that give us a deep understanding of your audience, we build real experiences to connect brands with consumers in an increasingly digital world.

Logic is the structure of the world around us: data, research, and careful analysis. Magic, meanwhile, encompasses emotions, intuition and transcendence.

And where logic and magic come together is the heart of human decision-making.

This unique approach—embracing specific and measurable business objectives and the latest AI-powered data and analytics technologies, along with bold, authentic, and uniquely human storytelling and creative—has enabled us to develop award-winning, highly effective campaigns for brands across all industries for a quarter of a century.

And we think that's pretty magical in itself.

Core Team
& Structure

Partnership Overview

Cohen's Fashion Optical needs a partner who delivers visible impact, strategic clarity, and performance you can demonstrate —not just promises. This section outlines Leap Group's recommended workstreams to build a performance-first, insight-led marketing engine that shows leadership exactly what's working—and why. We're not a "just trust us" agency. We prove it.

Leap Group proposes a fully integrated in-house core team to meet the strategic, creative, and technical needs of Cohen's Fashion Optical. Our services are structured around seven interconnected workstreams.

1. Account & Program Management

- Central point of contact for cross-functional coordination
- Bi-weekly status calls and bi-annual strategic planning meetings
- Project planning, billing, and contract management
- Platform/vendor oversight and escalation readiness
- Ongoing consultation and strategic leadership
- Consumer, Category and Competitor monitoring

2. Research, Planning & Audience Strategy

- Audience segmentation, list refresh, and persona development
- Platform and channel planning aligned to campaign goals
- Campaign planning and performance-based audience optimization
- Quarterly strategic consultations to refine creative and targeting strategies

3. Media Management

- Media strategy, placement, and operations
- Campaign setup, QA, and trafficking
- Budget pacing and performance optimization
- Real-time coordination with client and platform reps

Search Strategy – Organic & Paid

- SEO audits and technical optimization
- Keyword strategy and content alignment
- Competitive and backlink analysis
- Paid search campaign builds and restructures
- Audience targeting and retargeting tactics
- Budget pacing, bidding, and ad testing
- Full tracking and conversion infrastructure

Social Media – Organic & Paid

- Platform strategy
- Content creation, scheduling, and publishing
- Community engagement and moderation
- Paid social media planning, execution, and testing
- Performance optimization and ROI reporting

Email Marketing & CRM

- Weekly scheduled and ad hoc campaign execution
- Copywriting, design, segmentation, and A/B testing
- Analytics on open, click, and conversion rates
- Lifecycle messaging support and triggered automation

7. Advanced Analytics & Reporting

- Analytics audits and full tracking validation
- KPI development workshops and tech stack evaluation
- Custom dashboards for real-time visibility (Looker Studio)
- Budget pacing and media performance optimization
- Monthly cross-channel performance reporting
- Competitive benchmarking and year-end reporting
- Dedicated hours for ad hoc insights and deep dives

Maureen Johnson

Senior Account Director

Maureen is a one of the senior leaders at Leap Group. While her title is Account Director, her true specialization is digital advertising strategy. With over a decade of experience as a strategic marketing leader, Maureen has helped lead some of Leap's most important accounts. She has a proven track record of driving tangible business results.

Some of Maureen's notable account experience includes Atlas Van Lines, Heaven Hill Brands, Pinstripes, Fair Harbor, and many more. She is an excellent team leader that works hard to find the right balance of serving and leading her clients.

Maureen resides in Louisville, KY and works out of the Leap Group HQ office.

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Jordan Turner

Sr. Director, Performance Media

Jordan Turner is our Senor Director of Performance Media. Jordan oversees media execution with a personal focus on driving business performance for our clients through their media and search activities. With over 15 years experience in digital marketing and as a Google specialist, Jordan has a unique capability to help his clients win fast when it comes to media performance.

Jordan leads a team of fourteen media managers from all over the world. While most of the media team is based in Indianapolis, there are Leap Group media buyers located through the US and UK that help provide our clients a robust pool of talent to accomplish their goals. Some of Jordan's notable clients include True Food Kitchen, Pinstripes, AKC, Third Federal, Fair Harbor, Zout, Glisten, and Progress Software.

Jordan became a Hoosier last summer when he moved to Franklin, IN from Denver, CO.

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Ruby DeWitt

Vice President, Media Strategy

Ruby is an expert in paid media with more than 15 years of experience. She started her career in social media working on large scale brands such as Walmart, Bass Pro Shops, Super Bowl, and Tuner Sports. She has evolved into a world class media mind with experience planning, buying, and reporting on every type of digital and traditional media.

Ruby leads client strategy across the media portfolio and oversees the media planning and strategy teams at Leap Group. Some of her notable clients include Heaven Hill Brands, Eli Lilly, and AKC. Ruby has developed a culture at Leap Group around audience first media strategy. This approach starts with utilizing research, data analysis, and technology to ensure that every media plan is developed with hearts and minds of the target audience being the primary consideration.

Ruby has been with Leap Group for over 7 years. She is an amazing mother to Charlie (3) and Mary-Kate (6 months).

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Timothy Sauer, PhD

Vice President, Research and Consumer Strategy

Timothy builds strategy and brand experiences grounded in empirical research and real human insight. With a PhD in research and program evaluation, he leads Leap Group's in-house research team and serves as a strategic advisor on some of the agency's largest, most complex accounts. His background spans academia, behavioral research, and applied marketing—bringing deep, actionable understanding of audiences, markets, and cultural context.

He has guided insight-driven work across healthcare, CPG, and retail and e-commerce sectors for brands like Hershey's, UofL Health, Transitions Optical, and U-Pull-&-Pay. Whether through stakeholder interviews, persona development, or product testing, Timothy ensures every strategy is rooted in understanding people— not guesswork.

Outside of Leap, he runs an independent record label, collects Cold War propaganda and vintage advertising, and maintains an encyclopedic knowledge of professional wrestling. Research is his day job—and his passion project.

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Rebecca McBride

Integrated Marketing Manager

Rebecca is a seasoned integrated marketing strategist with over a decade of experience leading performance-driven campaigns across industries including e-commerce, healthcare, legal, SaaS, tourism, and government. Since 2015, she has developed and executed omni-channel strategies that deliver measurable impact.

Her work includes a standout project with a regional Chamber of Commerce, where she spearheaded a tourism campaign aimed at attracting bicycle enthusiasts, skiers, and hikers—successfully expanding the town's visibility and seasonal appeal. She also played a strategic role within a 22-hospital health system, collaborating closely with individual hospital marketing teams to boost service line awareness and drive quantifiable growth across the network. She has a passion for marketing and working with clients to achieve true results.

With a strong passion for data-informed marketing, she combines analytical insights with creative execution to ensure every initiative is optimized for performance and aligned with strategic goals.

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Kenny Friedman

Executive Creative Director

Kenny is a seasoned creative leader known for his ability to turn stories into compelling visual experiences and bringing brands to life. His passion for creativity drives him to consistently exceed client expectations by leading diverse teams in delivering innovative creative solutions that elevate brands. Kenny's expertise spans a wide spectrum, including production, branding, web design, retail, and comprehensive 360-degree marketing strategies.

With more than 20+ years of experience, Kenny has held executive creative positions at prominent agencies such as Known, Upshot, and JWT. He has also worked client-side for major companies like Target and FLOR.

Throughout his career, Kenny has partnered with notable clients, including Home Depot, P&G, Elkay, Target, Target Electronics, Walmart, Energizer, 3M, and Therma-Tru Doors.

His work delivers on his commitment to push creative boundaries and deliver results. In a world where creative ingenuity is essential to turning ideas into reality, Kenny is a true master of his craft.

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Clayton Sheppard

Director, Senior Consultant of Data Strategy & Analytics

Clayton Sheppard is an experienced analytics and marketing leader with over 20 years of success driving business growth through data-informed strategy. He specializes in leveraging first-party data, consumer trends, and advanced analytics to optimize marketing performance, improve product engagement, and increase customer acquisition and retention. Clayton has led multi-million dollar digital programs, delivered actionable insights, and aligned cross-functional teams with business goals.

He brings a unique perspective from working both client-side for major organizations like Bankrate and agency-side for brands such as Bridgestone, Domino's, and the Las Vegas Convention and Visitors Bureau. Clayton lives in Austin, Texas.

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Your Full Team

Media Strategy & Execution

Ruby DeWitt
VP, Media Strategy

Jordan Turner
Sr. Director, Performance Marketing

Media Execution and Moderation

Kaitlyn Croner
Media Manager

Rebecca McBride
Integrated Marketing Manager

Derelle Hankins
Media Manager

Account & Project Management

Walter Harris
VP, Director of Client Service

Maureen Johnson
Senior Account Director

Taylor Bird
Senior Account Manager

Jacquie Marroquin
Project Management Supervisor

Your Full Team

Creative Leadership & Production

Kenny Friedman
Executive Creative Director

Madison Asher
Associate Creative Director

Kim Pegram
Director of Brand and
Creative Implementation

Audience Insight & Campaign Planning

Laura Valentine
Senior Market Research Analyst

Andrea Renzi
Senior Media Buyer &
Market Research Analyst

Timothy Sauer, PhD
Vice President, Research and
Consumer Strategy

Analytics & Reporting

Clayton Sheppard
Director, Senior Consultant
of Data Strategy & Analytics

Clark Frye
Senior Consultant of
Data Strategy & Analytics

Cayman Hubbard
Technical Analyst

Executive Sponsorship

Ryan Smith
President/Principal

Onboarding:

Implementation & Transition Plan

Implementation Plan Overview

Leap Group is committed to a seamless and collaborative integration with the client's corporate environment, with an emphasis on embedded project management, team communication, and alignment with internal workflows. We prioritize a thorough onboarding, training, and discovery process to ensure a smooth and effective transition.

Leap Group proposes a four-phase onboarding and transition plan designed to establish alignment, integrate with your digital and appointment systems, and lay the foundation for scalable, results-driven campaign execution across retail and online touchpoints.

Phase 1: Alignment & Discovery

- Initial kickoff with key client stakeholders

- Kickoff with Cohen's Fashion Optical leadership and key stakeholders

- Deep dive into brand positioning, business goals, and seasonal retail drivers

- Audit of audience segments, media performance, content strategy, and store-level assets

- Review of CRM, appointment booking platforms, and analytics setup

- Access and documentation collection for current tools (Google, Meta, email platform, CMS, etc.)

Phase 2: Integration & Setup

- Admin and pixel configuration for Google and Meta

- Setup of campaign tracking, analytics dashboards, and ROI benchmarks

- Migration and refinement of existing customer lists and audience segments

- Campaign planning for next 1–2 quarters, including appointment-push and seasonal promotions

- Onboarding of Leap's cross-functional team: media, creative, analytics, and strategy

Leap Group proposes a four-phase onboarding and transition plan designed to establish alignment, integrate with your digital and appointment systems, and lay the foundation for scalable, results-driven campaign execution across retail and online touchpoints.

Phase 3: Soft Launch & Calibration

- Launch of initial paid and organic campaigns with close performance monitoring

- Establishment of baselines for media performance, bookings, and store engagement

- Development of optimization playbooks from early learnings

- Rapid feedback loop with Cohen's team for creative iteration and targeting refinement

- Escalation path testing for media, content, and reporting issues

Phase 4: Full Operation

- Ongoing campaign rotation and creative refresh cycles

- Bi-weekly syncs and monthly performance reporting

- Quarterly planning and seasonal readiness reviews

- Continuous improvement loop: audience refinement, message testing, and budget reallocation

- Visibility into performance across appointments, store traffic, and digital engagement
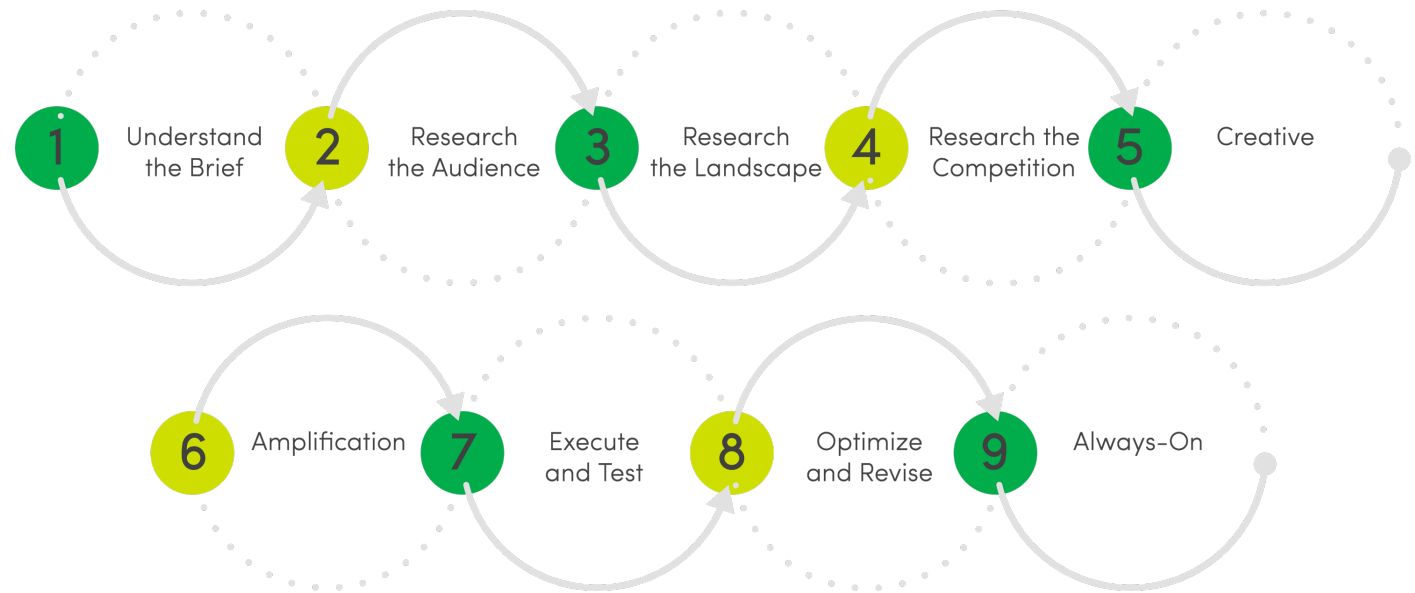
Campaign & Media Strategy:

Audience Strategy and Persona Development

Strategy First

The most expensive mistake a brand can make in social media is launching channels or programs without a strategy. We don't believe in over complicating this process. Our goal is to quickly and efficiently **get to execution** with a plan that can be tested and optimized over time.

Our strategy process starts with audience research.

Audience Driven Insights + KPI Inspired Tactics = Successful Digital Strategy

1 Understand the Brief
2 Research the Audience
3 Research the Landscape
4 Research the Competition
5 Creative
6 Amplification
7 Execute and Test
8 Optimize and Revise
9 Always-On

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Audience Strategy & Persona Development

At Leap Group, we begin every marketing strategy by developing detailed shopper personas. Our process blends first-party data, instore insights, and real-world behavior to define key audience archetypes—whether they're booking appointments, browsing for new frames, or taking advantage of promotions.

Persona Development Process
We ground our personas in actionable research drawn from a variety of sources:

- **First-party data and CRM insights** (past purchases, appointment history, location data)
- **Platform-level trends** from Meta, Google, and email
- engagement behavior
- **Retail behavior and demographic data** (from third-party sources and in-store analytics)
- **Internal interviews** with store teams and **sentiment analysis** from reviews, social media, and customer feedback

These insights help us map each persona's decision-making journey—including motivations, barriers, preferred communication channels, and timing triggers (e.g., vision insurance cycles, back-to-school, holiday sales). Personas are then used to guide:

- Campaign segmentation
- Messaging strategy
- Media channel mix
- Offer and creative customization

Campaign & Media Strategy:

Media Execution & Optimization

From Insight to Impact.

At Leap Group, media execution is never just placement—it's the final step in a deliberate, insight-led strategy designed to build relevance and drive measurable outcomes.

We don't just serve impressions; we create meaningful connections. Our mission is to connect real people with the products and services they actually want in a smart, beautiful, and strategic way—turning noise into clarity, content into connection, and data into decisions.

Our approach is rooted in logic and magic.

Logic is the structure: data, research, targeting models, and attribution frameworks.

Magic is the spark: emotion, timing, storytelling, and platform-native creativity that makes people stop, engage, and remember.

Where logic and magic meet is where real decision-making happens. That's where our media strategy lives.

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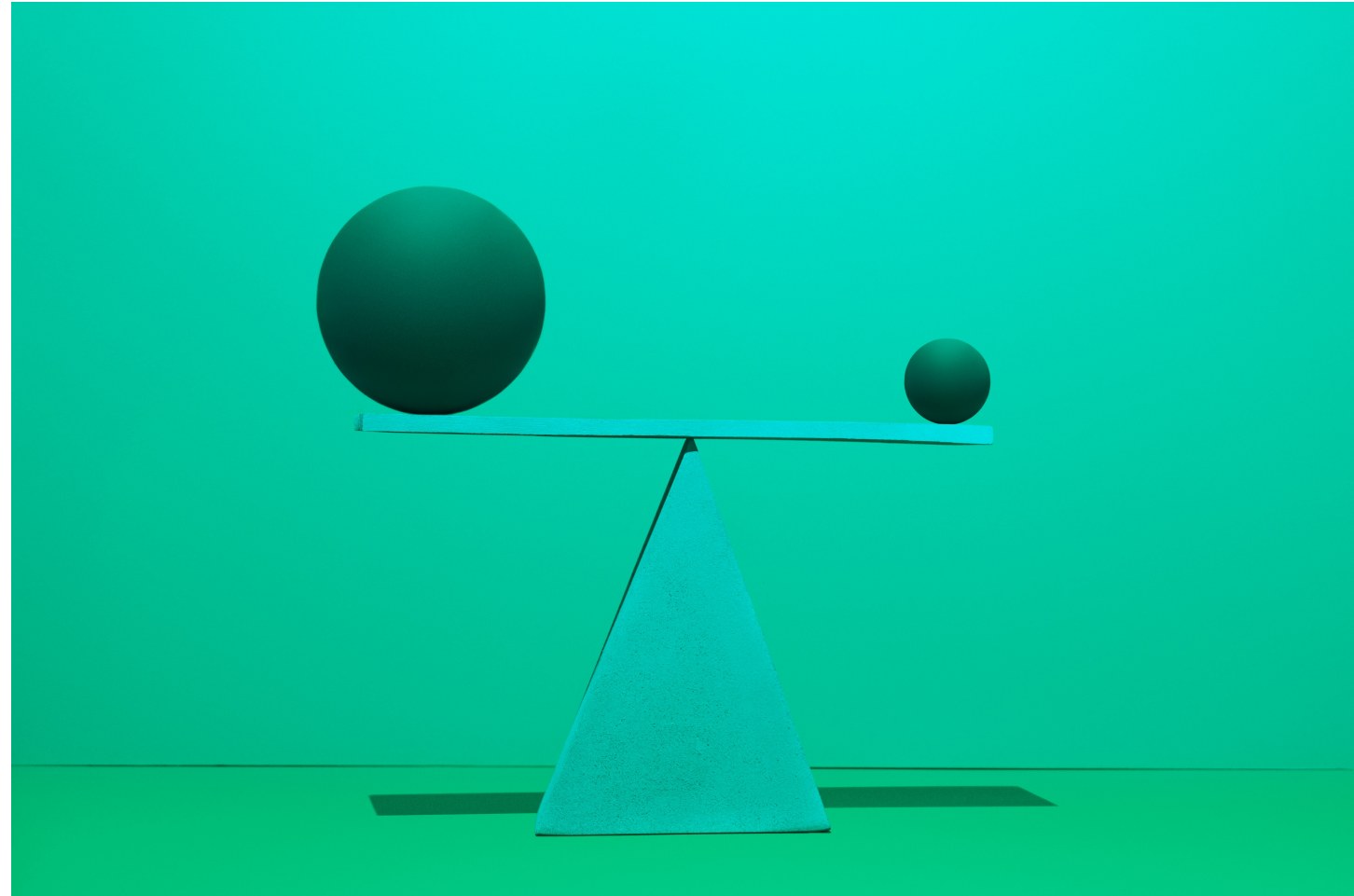
From Persona to Performance: Campaign Activation Strategy

Once personas are defined, we translate them into actionable campaign segments—mapped across platforms, creative formats, and conversion goals. Our goal is to make sure the right message reaches the right shopper, in the right moment, with purpose.

We always ask:

- What message will move this shopper toward booking or buying?
- What format will make them stop scrolling—or step into a store?

From there, we build campaign plans that don't just reach people—they resonate. Each message is matched to a platform. Each format is chosen for purpose.

And each insight is carried through to execution, so the strategy isn't something that gets left in a deck—it lives in the media.

Step 1: Persona-to-Platform Mapping

Each of Cohen's Fashion Optical persona—whether it's a Vision Plan Holder, Trend-Driven Shopper, or Budget-Minded Parent—is mapped to the right media and messaging environment based on:

- **Platform mix:** e.g., Instagram for fashion-conscious shoppers, Google for intent-based bookings, Facebook for family decision-makers
- **Targeting logic:** first-party CRM lists, interest-based targeting, geo-targeting near store locations, and lookalikes from past converters
- **Tone and messaging:** style-forward, value-driven, or care-based—depending on motivation and stage in the journey

Step 2: Message-to-Format Strategy

Each message is tailored to match the shopper's context and the format's purpose:

- **Short-form video:** Highlight new arrivals, brand partnerships, or exam reminders
- **Carousel ads:** Feature multiple frame styles, seasonal offers, or insurance benefits
- **Static images:** Promote store openings, walk-in availability, or book-now CTAs
- **Local campaign formats:** Click-to-call, click-to-book, and map-based store visit ads
- **Email campaigns:** Target lapsed patients, vision plan expiring reminders, or post-visit offers

Content isn't repurposed—it's reimagined for each audience and touchpoint.

Step 3: Execution & Optimization

Once live, we track every asset and audience combination to learn and improve in real-time:

- Performance is monitored by **persona, format, and offer**
- High-performers are scaled, and underperformers are quickly reworked
- Weekly insights feed directly into creative, targeting, and spend allocation
- Budgets shift dynamically across platforms to maximize bookings and ROI

dynamically based on efficiency (e.g., moving from static to video if VCR is outperforming CTR)

The result is a flywheel: insight feeds strategy, strategy feeds execution, execution feeds performance—and performance feeds back into insight.

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Optional: Creative Validation & Optimization

Understanding your audience is only step one. We use ongoing testing and creative validation to make sure campaigns actually land.

Before launch, we can survey priority personas to evaluate positioning, creative concepts, and message clarity — testing which executions drive relevance and intent. These pre-market insights guide final creative refinement and asset development.

During and after launch, we measure audience-specific performance and optimize. When creative underperforms, we don't guess — we test. Whether it's new copy, new visuals, or entirely new positioning angles, we use survey validation and/or multivariate in-market testing to identify what's working and what's not.

These insights feed a continuous performance loop:

- Messaging and creative refinements

- Budget reallocations across channels or segments

- New audience testing or segmentation adjustments

All updates are tracked in a centralized Audience Optimization Hub for transparency, continuity, and shared learning across teams.

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Performance and KPI Framework

TL;DR

Performance and KPI Framework Overview

Our KPI framework is not just a scorecard—it's a value engine. We don't just report data—we turn it into direction. Our KPI framework connects performance across paid, organic, email, and local efforts to the outcomes that matter most: appointments booked, store traffic generated, and marketing dollars maximized.

With real-time dashboards, persona-level insights, and a built-in feedback loop, our system ensures every campaign evolves, every channel earns its keep, and every dollar has a job.

KPI Alignment Workshop

Setting the Foundation for Smarter Measurement

Before launching any campaign, we lead a dedicated KPI workshop to align around the business outcomes that matter most—and build a framework that tracks toward them with precision.

What We'll Do Together:

- Define success: bookings, store traffic, revenue, brand awareness, or a combination
- Align on leading indicators vs. lagging outcomes
- Establish baseline performance from current platforms and historical data
- Prioritize KPI hierarchy across performance, engagement, and brand visibility
- Identify gaps in tracking, attribution, or reporting infrastructure
- Build a shared measurement model that's actionable and repeatable

Why It Matters:

- Ensures every campaign, channel, and dollar is tied to your business goals
- Eliminates vanity metrics and misaligned reporting
- Speeds up optimization by giving us the right signals from the start
- Creates transparency and shared accountability for results

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Our KPI framework isn't just a reporting tool—it's a real-time performance engine.
Each KPI is tied to outcomes that matter for retail and healthcare service delivery:
booked appointments, foot traffic, online engagement, and sales.

We organize KPIs into three strategic tiers:

1. Media & Campaign Efficiency

These metrics measure how efficiently your paid media budget drives traffic and results
across Google, Meta, YouTube, and emerging channels:

- **Cost Per Click (CPC)** – Spend efficiency benchmarked by location and audience segment
- **Cost Per Lead (CPL)** – Focused on booked eye exams or email opt-ins
- **Cost Per Appointment** – Ultimate efficiency metric for in-store or online bookings
- **Cost Per View (CPV)** – For scroll-stopping video performance
- **Impressions & Reach** – Localized and benchmarked against store targets
- **Click-to-Call Rate** – For direct phone bookings from search ads
- **Store Visit Attribution** – Google GMB feed + ad connection to track footfall
- **Budget Pacing** – Mid-month and monthly pacing aligned to planned allocations

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2. Engagement & Creative Performance

These KPIs evaluate how well messaging and creative assets drive interaction, influence, and relevance:

- **Click-Through Rate (CTR)** – Creative resonance by format, audience, and platform
- **Engagement Rate** – Comments, saves, shares, and reactions across social posts
- **Video Completion Rate (VCR)** – Depth of content consumption
- **Scroll-Stop Rate / Thumb-Stop Ratio** – For short-form video effectiveness
- **Content Testing Performance** – Ad variant performance in split tests
- **Follower Growth / Community Health** – Brand channel visibility trends
- **Email Open & Click Rates** – Campaign effectiveness for segmentation and triggers

3. Business & Booking Performance

These KPIs connect marketing to measurable business outcomes:

- **Online Booking Rate** – % of site visitors completing a booking
- **Appointment Confirmation Rate** – From initial interest to conversion
- **Revenue per Campaign** – Used where eComm or POS data is available
- **Booking Source Attribution** – By ad, platform, audience, or campaign
- **Branded Search Lift** – More consumers searching for your name means marketing is working
- **Share of Voice (SOV)** – Competitive visibility across paid channels
- **Competitor Benchmarking** – Tracking media spend, tactics, and promotions

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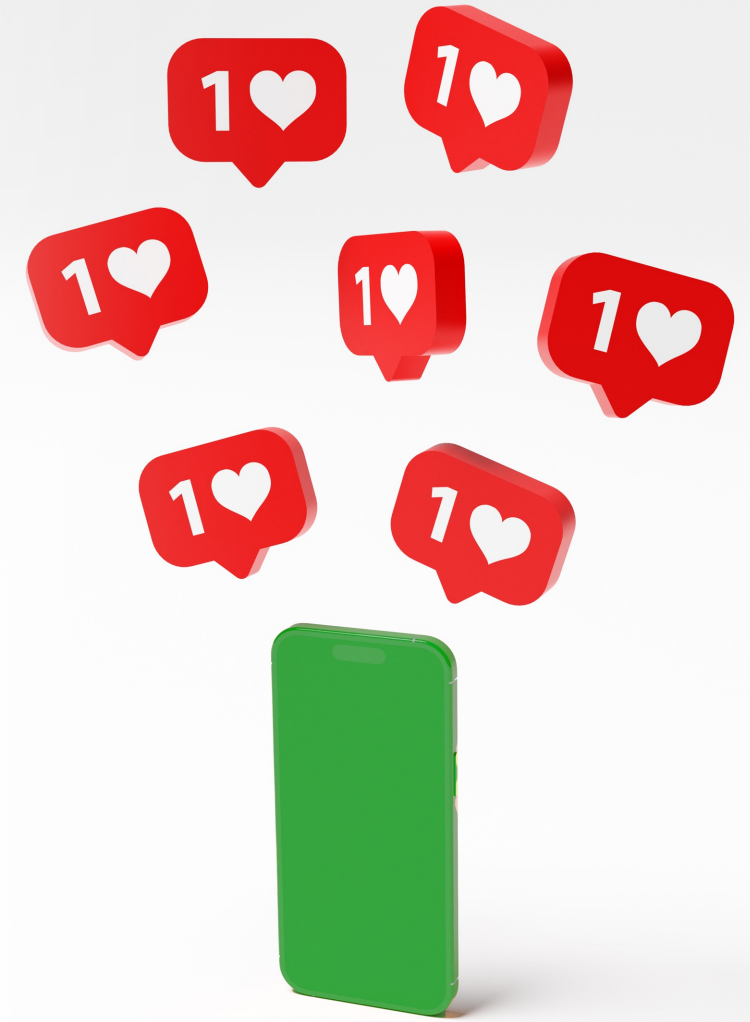
Optional KPI Framework:

Brand Awareness & Lift

Focus: Measuring how paid and organic media impact overall brand perception, visibility, and downstream customer behavior—especially during major campaigns, brand updates, or market expansion.

This framework is modular—**we can activate parts or all of it** depending on campaign objectives and data access. It's ideal when Cohen's wants to go beyond just appointments and clicks—to truly understand how the brand is growing in-market.

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Brand Awareness & Lift KPIs

Metric	Description
Store Traffic Lift	Compare foot traffic during vs. pre-campaign using Google Business Profile insights or store POS
Appointment Volume Uplift	Analyze total eye exam bookings compared to baseline periods or same timeframe YoY
Traffic Quality (via GA4)	Track session depth, bounce rate, and page path behavior post-ad click or organic discovery
Branded Search Interest	Monitor search demand for "Cohen's Fashion Optical" via Google Trends across campaign windows
Branded Click Growth	Track growth in branded keyword click-throughs in paid and organic search via Google Ads + GA4
Ad Recall / Awareness Lift	Where available (Meta/YouTube), use platform brand lift surveys to gauge awareness or recall
Brand Lift Study (Optional)	Custom survey-based studies to assess shifts in awareness, consideration, or perception
Share of Voice (SOV)	Measure Cohen's presence vs. competitors in search, social, and media placement share
Sentiment Monitoring	Use social listening (via native tools or Brandwatch) to gauge tone and consumer response trends
Channel Health Review	Quarterly platform audits to assess cost-efficiency, creative wear out, and targeting performance

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Reporting

Insights-to-Strategy Feedback Loop

We don't report data—we activate it.

Every reporting cycle includes four core components:

- **What We Saw** – Campaign performance across platforms and personas
- **What It Means** – Insights on efficiency, engagement, and impact
- **What We Changed** – Updates made based on those insights
- **What We Recommend** – Actions for next cycle (creative, budget, targeting)

These insights power weekly optimizations and quarterly planning, so campaigns stay relevant, cost-efficient, and outcome-driven

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Reporting

Our digital marketing reporting solutions are highly adaptable and can be customized to meet your specific requirements. We offer a range of reporting formats, including PDF reports, PowerPoint presentations, interactive dashboards, and shared spreadsheets, ensuring that your reporting is tailored to your preferences and needs.
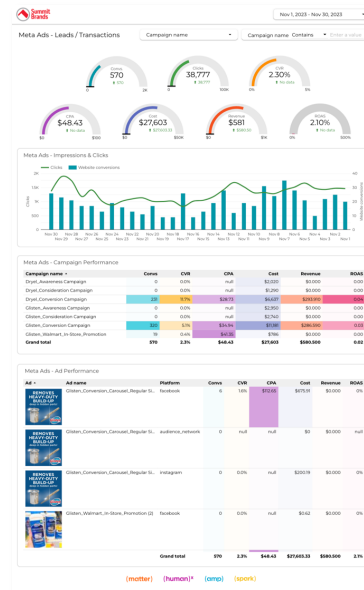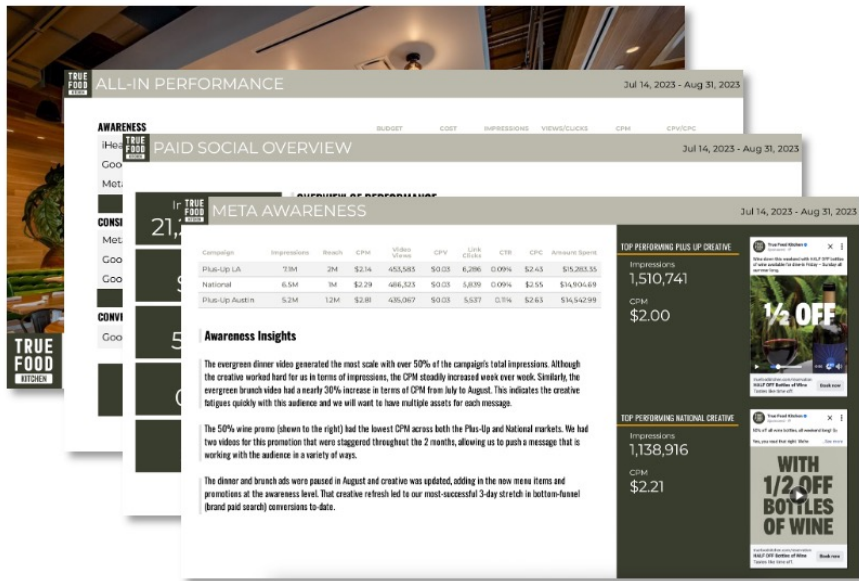
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Proposal and Budget

Proposal & Budget Overview

At Leap Group, we are focused on driving cost efficiency and business value with a strategic approach, grounded in data and streamlined workflows.

We've structured our proposal to directly address Cohen's most urgent needs: performance clarity, creative alignment, and ROI you can see. The budget reflects the level of service required to deliver fast wins while building long-term marketing value—backed by data, accountability, and leadership visibility.

Our Approach & Proposal:

What We Heard:	How We Deliver:	Audit Issues Solved:
Clarity on ROI & Performance	Unified KPI framework and real-time dashboards with store-level attribution and pacing alerts	Fragmented conversion tracking; no clear performance visibility
A Strategic Partner, Not Just an Executor	Persona-driven strategy, behavioral segmentation, channel-specific planning, and testing based on actual shopper behavior	Campaign/ad group chaos; no targeting differentiation
Actionable Insights, Not Just Data	Monthly optimization reporting, QBRs, weekly insights—with clear recommendations and rationale	Raw data dumps; underutilized analytics; unclear optimization path
Creative Aligned to Strategy	Format-purpose matching (e.g., scroll-stopping video, carousel for comparisons), retail-first storytelling, and conversion-optimized messaging	Creative misalignment; disconnected content strategy
Proof for Leadership	Tangible impact visuals: placements, local rollout maps, channel comparisons, budget efficiency reports	Lack of brand-safe placement controls; sitelinks created by Google; limited campaign visibility
Efficient Local Campaign Management	Consolidated paid search structure, smart bidding, geo-targeting, and GMB-linked local action tracking	100+ disjointed campaigns, keyword overload, no store visit tracking
A Transparent, Collaborative Partner	Clear "why" behind every recommendation; open communication loop with strategy, media, and creative synced in real-time	Lack of communication, no rationale behind tactics, "just trust us" approach

Performance Marketing Program

Total Fee (Annually)

$367,800

Media and Related Passthrough:

Approved media plan budget shall be invoiced quarterly not less than 30-days in advance of each quarterly period. Program Fees noted herein support total media spend of up to $2,500,000.00 each calendar year. An incremental fee of 12.0% shall apply for media spend in excess of this threshold, which shall be deducted from the media placed.

1. Initial Setup, Planning, Strategy & Onboarding

- Conduct initial account and web property audits

- Implement administrative and operational setup changes across Google, Meta, and other platforms

- Restructure paid accounts based on audit findings and best practices

- Develop a 3–6 month strategic performance marketing plan

- Audit and enhance tracking infrastructure to support media performance and attribution

- Overhaul and consult on evergreen paid media creative assets

- Recommend and support UX/UI enhancements to landing pages or digital experiences

- Refresh and optimize business location feeds (starting with Google; expansion to other platforms as needed)

2. Integrated Marketing Strategic Counsel

- Ongoing strategic partnership to guide and align marketing activities with business goals

- Development of **cross-channel content strategy** to support campaign performance and brand consistency

  o Includes messaging frameworks, content pillars, and channel-specific creative briefs

  o Collaboration on key campaign themes and evergreen content

  o Strategic counsel on creative testing and performance-based content optimization

- Support for aligning content with customer journey stages, including TOF/MOF/BOF strategy

- Strategic input across campaign planning, editorial calendars, and integrated communications

- Strategic counsel to be provided for SMS Marketing and Marketing Automation initiatives

3. Ongoing Digital Media & Advertising Management

- Ongoing adjustments to the media plan and mix across digital and traditional platforms

- Full media placement and trafficking support

- Campaign optimization on a weekly/monthly basis

- Development of media insights and strategic recommendations

- Coordination across channels to maintain cohesive messaging and maximize performance

- Annual media planning to take place in Q3 for subsequent year

4. Search Management – Organic & Paid

Organic:

- Conduct ongoing SEO audits (technical, on-page, and off-page)
- Keyword research and mapping aligned to user intent and business goals
- On-page optimization: meta tags, headers, internal linking, and schema markup
- Content recommendations to drive traffic and improve rankings
- Monitoring and optimization of Core Web Vitals, mobile performance, and page speed
- Competitive analysis and backlink opportunity identification

Paid Search:

- Campaign buildout and restructuring across Google Ads
- Audience targeting strategies including retargeting, customer match, and in-market segments
- Budget pacing and bid strategy optimization (manual and automated bidding)
- Development and testing of ad copy, sitelinks, and creative variations
- Keyword management: discovery, match type strategy, and negative keyword refinement
- Implementation of conversion tracking, event tagging, and pixel validation

5. Social Media Management – Organic & Paid

Organic Social:

- Strategy, creative development, and publishing: 5 feed posts and 2 stories per month on Facebook and Instagram
- Community engagement and management
- Monthly reporting on reach, engagement, and growth

Paid Social:

- Audience targeting and media strategy
- Campaign execution, A/B testing, and creative optimization
- Ongoing platform management and monthly ROI reporting

6. Email Marketing

- Creation and deployment of 2 scheduled emails per week within client's preferred email platform
- Two ad hoc email campaigns per month
- Copywriting, design, segmentation, and testing
- Reporting on engagement, deliverability, and conversion metrics

7. Advanced Analytics & Reporting

- Full **analytics audit** and tracking validation
- **KPI Workshop** with the client to define performance benchmarks
- **Tech Stack Review** with specific focus on analytics, tracking, and dashboarding tools
- Setup and management of automated **Looker Studio dashboards**
- Bi-Monthly Media Budget Pacing Insights and recommendation on reallocation of underspend
- Monthly **strategic reporting** with expert insights and optimization recommendations
  - Inclusion of SEO, email marketing, organic/paid social and search performance insights
- Up to **5 hours/month** allocated for ad hoc or one-off data requests related to scope services
- End of Year Reporting Recap with Performance and Competitor Analysis Meeting
  - Competitor analysis to include up to 5 competitors and will include details related to creative, media spend and overall share of voice.

Flex
Retainer

Range (Quarterly)

$30,000–$80,000

Set at (Quarterly)

$30,000

Partnership Credit: Upon execution of all scopes

$20,000
Research Credit

AM/PM Program

Strategic Partnership, Not Billable Overhead

Our AM/PM program isn't just account coordination—it's built to give you **unfettered access to a team of experienced, strategic partners** who serve as an extension of your organization. From big-picture thinking to day-to-day momentum, this team ensures your investment works harder at every level.

- **Continuity You Can Count On:** Our layered structure ensures smooth transitions, shared knowledge, and uninterrupted progress—even through personnel shifts on either side.
- **High-Touch Communication:** You'll never wonder who to call or whether you can ask. This program ensures proactive, ongoing contact—so you're always in the loop and never waiting on answers.
- **Strategic Accountability:** We guide everything from workstreams to KPIs to creative alignment, keeping the full agency machine focused and moving with purpose.
- **Built-In Quality Assurance:** Project Managers own timelines, resourcing, and deliverable flow—catching potential issues before they become real ones.
- **No Surprise Costs:** Consulting time, quick-turn strategy sessions, and senior leadership input are all baked in—so collaboration is free-flowing, not nickel-and-dimed.
- **Elite Talent Access:** Clients who invest at this level work directly with our most experienced, strategic thinkers—division heads, directors, and team leads.

A program means never having to think twice about reaching out—and always knowing someone's got your back, your business, and your best outcome in mind.

Established at (Monthly)

$9,350

In support of

$475-550K

Anticipated annualized billings

Thank You!

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