

Marketing Agency Request for Proposal



Eastern Caribbean Securities Exchange

St. Kitts

January 2019

Table of Contents

- Summary of Request 1**
- Company Background1**
- Our Vision1**
- Our Mission 1**
- Our Values 2**
- Strategic Statement2**
- Strategic Objectives2**
- Purpose and Objectives.....2**
- Target Market.....3**
- Guidelines3**
- Proposal format and requirements.....3**
- Timelines4**

Summary of Request

The ECSE is seeking to retain a Marketing Agency to provide professional marketing services to effectively promote the ECSE as the medium of choice for wealth creation and capital-raising in the Eastern Caribbean Currency Union.

The shortlisted applicants will be invited to make a short presentation at a meeting with the ECSE and thereafter the successful applicant will be selected.

The ECSE reserves the right to accept or reject any proposal submitted in response to the RFP without the need to provide a detailed explanation.

Company Background

The ECSE was incorporated in the Federation of St Christopher and Nevis under the Companies Act of 1996 as a public limited liability company. It is licensed under the Securities Act of 2001, a uniform regional body of legislation in Anguilla, Antigua and Barbuda, Dominica, Grenada, Montserrat, St Christopher and Nevis, Saint Lucia, and St Vincent and the Grenadines.

The ECSE carries on business as a regional securities exchange and facilitates the buying and selling of financial products, including corporate and government securities for the member territories of the Eastern Caribbean Currency Union.

The registered office is situated at Bird Rock, Basseterre, and St. Kitts.

Vision

To be the medium of choice for wealth creation and capital-raising in the Eastern Caribbean Currency Union

Mission

To provide the Eastern Caribbean Currency Union (ECCU) with an accessible market place in which to issue and trade securities, to clear and settle trades, and to register companies in a transparent, seamless, confidential and secure manner.

Values

Accountability & Transparency

Efficiency, Professionalism & Competence

Integrity, Reliability & Dependability

Responsive & Client-Focused

Strategic Statement

To grow revenues by leveraging our advanced technological capacity to offer the most efficient and appropriate capital market products and services to a broadened clientele, based on responsive, client-focused operations, and strategic marketing and outreach activities.

Strategic Objectives

1. Rationalise the current offerings of products/services and systematically develop, then introduce, carefully selected new products/services based on analysis of the best market data available.
2. Embark on an aggressive revenue growth drive which ensures that as many “significant” companies as possible are listed.
3. Significantly improve access to the exchange by specified segments of the market through deliberate removal or lowering of existing “barriers”.
4. Develop and implement a strategic marketing and outreach plan that appropriately targets specific groups through optimal use of technology while ensuring ECSE’s long term success through cultivating a culture and capability of “healthy trading” among the youth.

Purpose and Objectives

The ECSE, in formulating a clear strategic direction (immediate, medium and long term), has identified one of the impeding factors as insufficient awareness of the role of ECSE in the economic development of the region. To address this shortcoming, it was decided that a Marketing Agency should be engaged to develop and execute a strategic marketing and outreach plan to achieve strategic objective #4 as outlined above.

Target Market

Our target market includes current and potential investors both locally and internationally especially the youth, existing and upcoming public and private companies, government institutions.

Guidelines

Initially this will be a one year contract. The scope of this project should be based on the strategic objective # 4, above. Initiatives should include:

1. “Use the power of technology for outreach initiatives”
2. Use of an effective mix of a broad range of media, traditional and social, to reach potential customers
3. “Create targeted outreach for specific groups - youth, existing businesses; use social media aggressively and effectively”

The successful agency will be required to republish our brochures in both e-copy and hardcopy and procure paraphernalia on our behalf for distribution.

The Proposal Format and Requirements:

Please use the following as a guideline to format your proposal.

1. Title Page

- This should include your company name, address, website address, telephone number and email address of primary contact person.

2. Cover Letter

- A cover letter signed by the person or persons authorized to sign on behalf of the company

3. Proposal

Discuss your proposed solution, including the benefits and uniqueness of your solution as well as your ability to deliver the project within the guidelines listed above. The proposal should also include at least three references based on similar work undertaken.

4. Fees

- A fee schedule should be submitted and the price you quote should be inclusive. If your price excludes certain fees or charges, you must provide a detailed list of excluded fees with a complete explanation of the nature of those fees.

5. Other

- Any other information the applicant deems pertinent for consideration.

Timelines

This RFP is dated January 21st 2019, proposals are due no later than 15th February 2019. Proposals will be evaluated immediately thereafter and agencies may be invited to make presentations to and/or be interviewed by our evaluation team by February 28th 2019. The top agency will be selected by 8th March 2019 and communication to all applicants will be made by March 15th 2019.

Work completion and deliverables date will be determined during the planning phase which should be completed by April 05th 2019.

Submission of Applications

Applications can be sent to:

The Managing Director
Eastern Caribbean Securities Exchange
P O Box 94
Basseterre
St Kitts

Electronic submission and requests for additional information should be forwarded to info@ecseonline.com.