Zoom Call Notes

# 1. Minutes of the Meeting (MoM)

* Agency to create a comprehensive digital marketing proposal after understanding client's business objectives and target audience.
* Client's offering has two main parts: a product (Panels - a project/communication management portal) and a high-end consulting service for US college admissions.
* Panels product targets both B2B (event managers, corporates) and B2C (parents, students, wedding planners, etc.) segments.
* Consulting service targets upper middle class/HNI parents in India with children in grades 9-12 aiming for top 50-100 US colleges.
* Client emphasizes premium positioning and exclusivity for consulting services; not targeting mass-market or low-cost segments.
* Current marketing efforts have included Meta ads (with some traction in India and US), but budget constraints limit scale.
* Agency suggests multi-platform approach: Google, Meta, LinkedIn, YouTube, WhatsApp for lead generation and nurturing.
* Discussion on lead management: foot-in-the-door offers (free consulting hour with trial subscription), webinars, and drip marketing for nurturing.
* Budget constraints: Client is self-funded/bootstrapped; initial marketing budget is limited (20-25k INR per month per service/product).
* Agency recommends minimum 50-60k INR per month per product/service for meaningful results, considering both media spend and agency fees.
* Strategy to start with focused campaigns (possibly on Meta/Google), test and iterate based on data, and expand as traction and funding allow.
* Client requests proposal with phased approach, budget breakdown, and recommendations for both consulting and product marketing.
* Agency to provide follow-up questions if needed and share proposal for client review.

# 2. To-Do List

* Agency to prepare and send a detailed digital marketing proposal covering both Panels product and consulting services.
* Client to provide access to Meta/Google ad accounts and any historical campaign data for review.
* Agency to break down minimum recommended budgets (media spend vs. agency fees) for each platform and service.
* Agency to outline phased marketing approach (initial focus, expansion plan, platform prioritization).
* Client to review proposal and provide feedback or additional questions.
* Agency to clarify any further requirements or missing information from client before finalizing the proposal.

# 3. Action Points / Action Plan

## Key Decisions Made

* Marketing to be split and targeted separately for Panels product and consulting services.
* Premium positioning and exclusivity to be maintained for consulting services.
* Initial campaigns to be focused and data-driven, with expansion based on results and available budget.

## Key Services to Promote

* Panels product (project/communication management portal)
* High-end US college admissions consulting (with bundled Panels subscription for consulting clients)
* Standalone Panels subscription for broader use cases (events, corporates, project management)

## Target Geography

* India (primary for consulting services, especially metro cities and HNI/upper middle class clusters)
* US (for Panels product and for Indian diaspora/immigrant populations)
* Specific pockets in India and US with high density of target audience (e.g., West Coast, East Coast US, major Indian metros)

## Budget and Timeline

* Initial suggested marketing budget: 20-25k INR per month per product/service (client's current limit), but agency recommends 50-60k INR per month for meaningful results.
* Phased approach: Start with focused campaigns on 1-2 platforms, test for 2-4 weeks, iterate based on data, and expand as traction and funding allow.
* Long-term: Scale up marketing spend and platforms as business and funding grow.

## Lead Management Strategy

* Foot-in-the-door offers: Free consulting hour with Panels trial subscription.
* Webinars and educational content for brand awareness and credibility.
* Drip marketing and retargeting using Meta and Google audiences.
* Segmented nurturing based on user journey (e.g., video views, website visits, form submissions).
* Emphasis on building trust and credibility for premium consulting audience.

## Next Steps and Ownership

* Agency: Prepare and share detailed proposal with phased strategy, budget breakdown, and platform recommendations.
* Client: Share access to ad accounts and any relevant historical data.
* Agency: Follow up with clarifying questions if needed.
* Client: Review proposal and provide feedback for next iteration.