Winity.Life eMarketing Call Notes

# 1. Minutes of the Meeting (MoM)

* Reviewed the core proposition of the platform: enabling users to load a prepaid card with stablecoins (USDT, USDC) and spend in USD internationally via Apple Pay, Google Pay, and fiat gateways.
* Clarified that all marketing content must be approved by the issuer due to strict compliance; messaging must avoid direct crypto card claims and use compliant language.
* Discussed target audiences: crypto enthusiasts, digital nomads, unbanked/underbanked, high net worth individuals, global freelancers, gig workers, tech-savvy early adopters, and virtual asset-savvy companies.
* Outlined a five-phase digital marketing approach: foundation/positioning, early demand/community building, paid acquisition/conversion optimization, user activation/retention, and scale/ecosystem integration.
* Identified key marketing platforms: LinkedIn (Sales Navigator for B2B), YouTube, Google Ads, Meta (Facebook/Instagram), Twitter, Telegram, Discord, Reddit, TikTok, email marketing, and crypto-native ad networks.
* Explained lead management and nurturing via WhatsApp and Telegram drip sequences, with automation and personalization based on user data and UTM parameters.
* Discussed technical requirements for automation: need for user data, USPs, content assets, and integration via API or landing pages to capture and segment leads.
* Highlighted the need for app download campaigns and Play Store/App Store marketing, including SDK integration for tracking and campaign optimization.
* Agreed to include pre-order functionality for cards as part of the marketing funnel.
* Confirmed agency capabilities: Google Ads, Meta Ads, SEO, YouTube, LinkedIn, email marketing, website development, content writing, graphic design, and account setup/verification.

# 2. To-Do List

* Agency (Abhishek) to share the prepared document and media plan, including app download strategy, with the client within the next few days.
* Client to provide product USPs, benefits, content assets (images, videos), and detailed information for campaign personalization as soon as possible.
* Agency to adjust all communications and ad creatives to comply with issuer's strict marketing guidelines and submit for approval before launch.
* Agency to add 'KAST' to the competitor list in the documentation immediately.
* Agency to develop and propose a detailed plan for app download campaigns, including Play Store/App Store marketing and SDK integration, within one week.
* Agency to set up lead capture mechanisms (landing pages, UTM tracking) and automation for WhatsApp/Telegram/email drip sequences after receiving required data from the client.
* Agency to include pre-order card functionality in the marketing funnel and update the plan accordingly.
* Agency to provide an overview of capabilities and support for Meta account creation, verification, and website business setup upon client request.
* Client to review and approve audience segmentation, communications, and campaign structure once shared by the agency.

# 3. Action Points / Action Plan

## Key Decisions Made

* Adopt a phased digital marketing approach targeting both B2C and B2B segments.
* Comply strictly with issuer's marketing guidelines, avoiding direct crypto card claims.
* Utilize automation and personalization in lead nurturing via WhatsApp, Telegram, and email.
* Implement app download and pre-order card campaigns alongside lead generation.

## Key Services to Promote

* Prepaid card loaded with stablecoins (USDT, USDC)
* Seamless crypto-to-fiat spending via Apple Pay, Google Pay, and international POS/ATM
* Virtual and physical card options
* Tiered rewards and premium (elite) card offerings
* B2B solutions for companies to offer cards to employees/customers

## Target Geography

* International markets (users can spend globally in local currencies)
* Specific focus on regions with high crypto adoption and digital nomads (e.g., Singapore, India, Bali, Berlin, etc.)

## Budget and Timeline

* No specific budget discussed; phased approach over several months (first three months for foundation/positioning, subsequent phases for demand generation and scaling)
* Immediate next steps to be completed within 1-2 weeks (media plan, campaign setup, compliance review)

## Lead Management Strategy

* Capture leads via landing pages with UTM tracking for source attribution.
* Segment leads based on inquiry source and user profile (nomad, elite, etc.).
* Nurture leads using automated, personalized drip sequences on WhatsApp, Telegram, and email.
* Use API or Google Sheets for lead data transfer and automation triggers.
* Focus on compliance with data privacy and platform policies (especially WhatsApp).

## Next Steps and Ownership

* Agency (Abhishek) to deliver media plan and updated documentation (including app download and pre-order strategies).
* Client to supply product information, USPs, and creative assets for campaign development.
* Agency to revise and submit all communications for issuer compliance approval.
* Agency to set up technical integrations for lead capture and automation.
* Client to review and approve proposed audience segments, creatives, and campaign structure.