Swift Check-in

Diagnostic & Audit

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Executive Summary

Following a two-week intensive diagnostic it has been concluded that Swift Check-in is a technologically capable company with a passionate team. However, it is currently a solution in search of a well-defined, high-value problem. The company's pre-revenue status is not a failure of individual effort or technical execution but a direct and predictable consequence of a critical strategic misalignment. Swift Check-in has prematurely invested in scaling a go-to-market (GTM) engine before achieving the foundational prerequisite for growth: product-market fit.

The diagnosis covered multiple facets of the business. This particular report has excluded Financial health and runway, customer success, customer support and brand audit details.

Key Findings

The current "*all-in-one*" product strategy is a significant liability in the mature and saturated Australian construction technology market. The inability to convert leads or close deals is not a sales or marketing problem; it is a symptom of this fundamental disconnect between the product's capabilities and the market's specific, urgent needs.

The audit surfaced three interconnected issues that collectively explain the current stagnation:

- ***Strategy*** has been pursuing too broad a market and reacting opportunistically to feature requests, without a clear niche or "north star" problem to solve.
- ***Undefined Ideal Customer Profile*** means efforts in product, sales, and marketing lack focus. Analysis reveals two high-potential ICPs with unmet pains.
- ***Broken Sales Funnel*** where outbound lead sourcing relies on low-quality, untargeted lists like the Yellow Pages, and the sales script is a feature-led pitch that fails to resonate. This has resulted in a 0% meeting conversion rate from 99 conversations with decision-makers, a clear indicator of a non-viable process.
- ***Negative ROI Marketing Spend*** where expenditure represents a direct financial loss. Paid advertising on platforms like Reddit has a demonstrably negative return, generating high volumes of low-intent traffic with low engagement rates (often below 10%). Similarly, SEO efforts are failing to convert thousands of impressions on high-intent keywords into meaningful traffic, with a click-through rate near zero for critical terms.

Strategic Imperative

The company must abandon its current "all-in-one" positioning and instead adopt a new, disciplined approach: Pick → Prove → Build.

1. ***Pick*** and hyper focus around one (max two) high-pain problem for one specific customer segment.
2. ***Prove*** willingness to pay by securing the first 5+ paying customers through problem-centric demos and a focused outbound list.
3. ***Build*** only after evidence of traction then the company invest in scaling the team, product, and GTM engine.

Strategic Situation & Root Cause Analysis

A company's journey from idea to scale can be understood in three distinct phases: *Traction*, *Transition*, and *Growth*. The Traction phase is a search for product-market fit. The Growth phase is the scaling of a proven, repeatable business model. A critical error for any startup is to operate in one phase while believing it is in another.

Swift Check-in is operating with a Growth-phase mindset—investing in a sales manager, an SDR, and paid advertising—while being firmly in the pre-revenue Traction phase. This fundamental mismatch is the primary driver of its current financial distress.

The company is funding an *execution engine* designed to scale a proven model when it should be funding a *learning engine* designed to discover that model in the first place.

This has resulted in a bloated operational structure, a premature and complex tech stack, and a high monthly burn rate of $20,000-25,000 with no offsetting revenue.

Falling into the "All-in-One Platform" Trap

The company fell into the "*all-in-one platform*" trap, leading to a diluted product strategy. Instead of a clear flagship use-case, the product tries to do a bit of everything – time tracking, scheduling, project management, compliance, budgeting, etc. – and ends up doing none of these exceptionally well. This stems from reactive development: after a pivot from a different sector (TAFE), the team added features piecemeal based on assorted customer requests, without a guiding framework. The result is strategic diffusion: a demo that touches high-level on many modules (as one prospect put it, "*a bit confusing*" with irrelevant sections), leaving prospects unclear on the core value.

One illustrative example was a demo with a mid-sized construction firm where the platform's breadth (scheduling, finance, safety modules all shown in one go) confused the prospect – she questioned why a field worker would need a finance module, indicating misalignment to her needs. The meeting ended without traction, just a polite request for a brochure, a common outcome when no urgent problem is conveyed.

In a mature market, an "*all-in-one*" strategy becomes a significant liability. Prospects quickly compare Swift Check-In to established solutions they already use. Conversations repeatedly raised incumbents like *Simpro*, *Procore*, *Fergus*, *Deputy* as existing systems.

Challenges of Entering a Mature Market ("Red Ocean")

The market is not a "*blue ocean*" of new buyers but a "*red ocean*" of existing software users who have high switching which require financial, operational, and psychological investments. Competing as a lesser version of these comprehensive tools is a losing proposition.

To overcome this inertia, a new entrant must offer a 10x value proposition. By spreading resources thin it makes it impossible to be 10x better at anything; at best, it can only be a 0.8x version of multiple incumbent products

This strategy forces any tiny startup to compete on every front at once – an impossible task that dilutes the team's focus and the product's value. The direct consequence is a generic, uninspired pitch ("*we do automated timesheets and scheduling*") that fails to give any compelling reason to switch from known solutions. In short, trying to be everything to everyone will result in being nothing special to anyone.

SWOT Analysis

Strengths	***Weaknesses***
Technically proficient team with fast build capacity and shipping ability. Passionate and committed founders and team dedicated to solving construction ops problems. Customizable and integratable SaaS with flexible architecture and integration potential (e.g., payroll). Functional and reliable core check-in and timesheet product. Website representation is strong	No Validated ICP A wide-but-shallow "all-in-one" that fails to differentiate in a saturated market Zero revenue & no proof of product-market fit, no customer validation beyond free trials. The sales process is amateurish and marketing spend is being wasted due to lack of targeting and messaging. With limited runway, the company cannot sustain trial-and-error for long.
Opportunities	***Threats***
Two specific profiles have voiced urgent pain that is not fully solved by incumbents. Large competitors are broad and serve many needs; they can be "overkill" or too complex for smaller players and/or pricing mismatch for mid tiers The identified problems have clear dollars attached. Solving these yields immediate ROI for customers. This makes value-based selling and pricing feasible. Swift Check-In can move faster than large firms to add a niche feature if it laser-focuses. Competitor pricing models, particularly Fergus's per-user, create a vulnerability that a new pricing strategy can exploit.	The construction tech market in Australia is crowded with well-funded players - gaining attention and trust as a new vendor is hard. Construction companies have invested time/money in current systems (and staff training). Getting them to switch, or even adopt an additional specialized tool, faces inertia and resistance Without revenue, the company could run out of cash before proving the new strategy. If the pivot doesn't yield traction quickly, there may be no second chance. Bigger players could mimic the key features relatively quickly.

Market & Competitive Analysis

Total Addressable Market (TAM)

Broadly defined, the market for construction operations and workforce management software in Australia is large (in the order of tens of thousands of contracting businesses, worth hundreds of millions in software spend annually). While the TAM is immense, valued at $538.6 billion, this macro figure is strategically irrelevant for a pre-revenue startup.

Every construction company that manages field workers or subcontractors is a potential user of some system to track time, jobs, compliance, or project progress.

However, this TAM is already largely penetrated by existing solutions or manual processes – it's not a greenfield.

As one SDR call after another revealed, prospects "already have a system in place" in most cases (be it a software or some manual method). The TAM is fragmented by sub-segment and use-case, which leads to the importance of focusing on a Serviceable Obtainable Market (SOM) for an early-stage startup.

Serviceable Addressable Market (SAM)

For Swift Check-In's purposes for the future state of an "all in one", the relevant market narrows to two primary segments:

- Trade Contractors (20–100 employees) – e.g. electrical, plumbing, or specialty contractors who directly employ crews. There are thousands of such businesses in Australia. They typically use either generic solutions (Excel, basic timesheet apps) or an SME-oriented tool (like Simpro, Fergus) for operations. This segment cares about internal workforce productivity and cost.

- General Contractors / Fit-out Firms (using many subcontractors) – e.g. commercial fit-out companies, small general builders who sub out most work. There are fewer of these (perhaps a few hundred medium-sized ones in target regions), but they handle high project volume. They likely use project management systems (Procore, etc.) plus require site attendance tracking (some use sign-in apps like SignOnSite or generic visitor logs). They care about verifying subcontractor work and compliance.

Serviceable Obtainable Market (SOM)

In the next few months, Swift Check-In can realistically aim to capture a slice of one of these segments – essentially a handful of early adopters in one niche. For example, if targeting trade contractors, the SOM could be "electrical contractors with 5–50 staff who are actively suffering overtime overruns."

There are about 1500 *(based on my early research and prospecting)* of those; obtaining 5–10 as paying clients would be a huge victory.

In summary, the realistic near-term market is not the whole construction industry but rather a carefully chosen micro-market where Swift Check-In can win quickly and then expand. This market will be the stepping stone to the wider TAM and market penetration.

Competitive Landscape

The Australian construction tech landscape is a red ocean: crowded, mature, and highly competitive. Target customers are already using a mix of software tools.

The competitive landscape is dominated by two primary categories of players, both of which create significant barriers to entry for a new, undifferentiated product.

The All-in-One Platforms: These are comprehensive, deeply entrenched Field Service Management (FSM) platforms that aim to manage a company's entire workflow.

- ***Simpro:*** An upper-tier, all-in-one solution frequently cited by prospects as their incumbent system. Its breadth makes it extremely "sticky," creating massive disruption and cost for any business considering a change.[1]
- **Fergus & ServiceM8**: Strong competitors in the trades space, these platforms offer robust job management from quote to invoice. Their presence means that even smaller trade businesses have already adopted sophisticated digital workflows.

The Specialists & "Good Enough" Ecosystem: Beyond the giants, the most formidable competitive force is the constellation of specialized tools that, when combined, create a "good enough" solution for many businesses.

- ***Deputy***: A powerful, dedicated tool for workforce management and scheduling.[1]
- ***Xero***: Accounting software whose basic timesheet functionality is sufficient for

businesses that prioritize seamless financial integration above all else.[1]

- ***Procore & Hammertech***: Enterprise-grade platforms for large-scale project management and safety, demonstrating the technological maturity at all levels of the market

Our diagnostic calls confirmed that the first objection Swift Check-In hears on cold calls is usually "We already use [Competitor X]." In fact, across outreach, prospects mentioned a wide array of established solutions: i.e. comprehensive Field Service Management platforms like Simpro and AroFlo, job management apps like ServiceM8 and Fergus, workforce/HR tools like Deputy, and heavy-duty construction management suites like Procore. Table summarizes key players:

Selected Competitors in Construction Ops Tech (Australia)

Competitor	*Target Segment*	*Market Perception*	*Pricing (Typical)*
Simpro / AroFlo	Trades & Field Service SMEs	Very deep feature set for end-to-end workflow (job costing, invoicing, scheduling). **Integrated all-in-one** for small/medium contractors.	Per-user per month (+ onboarding fees). Mid-priced SaaS.
Procore	Mid-to-Large General Contractors	**Comprehensive project management** for large, complex projects; strong financial controls and document management. Industry standard for enterprise-level construction.	High-end (enterprise pricing, often based on project volume) – significant annual contracts.
Deputy	Horizontal (any industry with shift workers; some construction use)	Excellent for **employee time & attendance**, scheduling, and award wage compliance. User-friendly mobile app.	Per-user per month; tiered plans (affordable).

ServiceM8	Small Trades Businesses (1-20 staff)	Very easy to use, **mobile-first** app. Great for simple jobs: quoting, scheduling, invoicing in one. Popular with small contractors (esp. on iOS).	Tiered plans based on job volume (monthly subscription).
Fergus	Trades SMEs (e.g. plumbing, electrical)	Built by tradies for tradies. Solid workflow from quote->schedule->timesheet->invoice. Good supplier integrations (parts, materials).	Per-user per month; SMB-friendly pricing.
Hammertech	Safety & Compliance on Large Sites	Best-in-class for **site safety management**: inductions, permits, safety audits, compliance documentation. Often mandated on commercial projects.	Typically priced per project or based on construction value.
SignOnSite	Construction site attendance (all sizes)	Simple mobile check-in app for job sites, used to track who's on site (often for safety).	Per-site or per-user licensing, relatively low cost.

Problem Solution Fit & Profiling

The wide net of calls and progress on 2 trials have resulted in good learnings. The nuggets of gold extracted from SDR notes and demo calls show two distinct problems and viable profiles.

Profile A: "Overtime & Overrun" Contractor

This profile, modeled on the detailed feedback from Current Group, represents project-based trade businesses whose profitability is directly tied to managing their internal, employee workforce

Profile: Mid-sized electrical (or other sub categories like plumbing) contractors with 20-50 employees, managing multiple job sites.

Mission-Critical Pains;

- ***Uncontrolled Labour Cost Overruns:*** This is the primary, visceral pain. The directors "only care about the overtime". Because projects are quoted at a fixed price, every hour of unbudgeted overtime is a direct erosion of profit margin. As Andrew from Current Group stated, "paying overtime means we failed".
- ***Fraudulent Timesheets & Lack of Accountability:*** The inability to verify employee-submitted hours is a significant financial risk. The team needs a system that provides irrefutable evidence to "go down a disciplinary route with them if they are completing fraudulent time sheets".
- ***Administrative Burden:*** The manual workflow of collecting paper timesheets, deciphering handwritten notes, and manually entering data into MYOB is a major bottleneck. Andrew (prospect) quantified this pain, stating an automated system would "save me like half a day".

Core Job-to-be-Done: "Help me protect my project profitability by giving me real-time, exception-based control over my internal labour costs." As Andrew articulated, they don't want to monitor every activity; they want "exception reporting... if it's not going the way it's meant to, then they need to know".

Current workflow

Many of these companies use paper or Excel combined with something like MYOB for payroll. They rely on trust and after-the-fact review to catch overtime. For instance, Current Group currently collects timesheets manually and then Steve and another manager review a pivot table of hours to decide what overtime they will refuse to pay. This is reactive and could cause employee friction. They expressed that real-time alerts (e.g. "John is on overtime as of today") would let them intervene or at least not be surprised at week's end.

Ideal Solution Vision

They effectively want a laser-focused timesheet system that acts as a watchdog: automatically flagging any overtime or anomaly so it can be addressed immediately. Andrew put it as "what they want is exception reporting... if it's not going the way it's meant to, then they need to know. If everything's fine, then they don't need to know.".

In other words, a quiet system that only makes noise when something's off-track. They do not want a heavy project management suite – Steve even cut off a demo explanation to say, "I don't care about [workers] taking a break... I just care when they get there and when they leave," refocusing on the core issue of hours on site. The financial driver is paramount: save money by reducing overtime and save time by automating payroll prep.

Value Proposition to Validate

"Swift Check-In helps contractors protect project profit by eliminating unplanned overtime and automating timesheets." In financial terms, if a 25-person company has a $1.5M annual payroll, even a 5% reduction in overtime waste saves ~$75k/year.

We need to better understand this problem to better develop ROI but however if we assume proposed pricing is say ~$10k/year is trivial compared to the savings – a compelling ROI. This plus also values getting rid of tedious admin; freeing 150+ hours a year of a manager's time from data entry is another quantifiable benefit in the case of current group.

Key Requirements for Profile A

- Real-time overtime calculation and alerts (text/email) to foremen or managers when a worker is about to go into overtime.
- Exception reports highlighting any hours beyond standard, or missing clock-ins, etc., at daily/weekly intervals.
- Seamless Payroll Integration – push approved hours to MYOB, Xero, etc., to eliminate manual entry.
- Ease of use for crew – a simple mobile or kiosk check-in that even tech-unsavvy workers can handle (possibly with GPS or QR to verify location).
- Audit trail – secure records of who clocked in where and when (to prevent or catch any falsification). Possibly photos or GPS tags for fraud prevention.

Secondary nice-to-haves: Scheduling interface that ties into the above (they do scheduling in Google Calendar now, so integration or replication of that could be considered later), and basic project budget vs actual reporting (they manually pivot now – the system could auto-generate overtime cost reports per project).

Profile B: "Subcontractor Verification" Contractor

This profile, modeled on the feedback from Slyco Group (prospect), represents businesses whose model relies heavily on external subcontractors ("subbies"), often for work that occurs without direct supervision.

Profile: Commercial, retail, or shopfitting contractors who subcontract a significant portion of on-site labour, often at night in locations like shopping centres.

Mission-Critical Pains;

- ***Subcontractor Invoice Verification:*** This is the paramount issue. The primary function of a check-in system is as a financial verification tool to prevent overbilling. Gina Sly's position was unequivocal: "We need to know exactly how many were there and exactly how long they were there so that when we receive the invoice from them, we know that invoice is correct... If they haven't scanned in... then we wouldn't pay that invoice".
- ***Lack of On-Site Supervision:*** Much of their work takes place at night, making a reliable, tamper-proof check-in system a mission-critical requirement for financial control.
- ***Need for Granular, Job-Specific Tracking:*** A generic, site-wide check-in is useless. They require the ability to track subcontractor time against specific jobs within a single physical site. Gina emphasized this, noting "there could be up to five jobs in that Westfield... The check-in code would need to be specific for that job".

Core Job-to-be-Done: "Help me eliminate the financial risk of overpaying subcontractors by providing indisputable, job-specific proof of their presence."

Current Workflow

Some use manual sign-in sheets or generic apps. For instance, some GCs use SignOnSite (mobile app) to have workers sign in on their phone when on a site. However, those solutions often are site-wide only (not job-specific) and just give presence, not linking to cost codes. In absence of anything, GCs rely on trust or post-facto disputes (“prove your guys were there 10 hours”). Slyco’s interest shows that existing tools (like their mention of “scanning in”) might not meet their specific need of job-level granularity. They actually had a partially manual workaround: possibly unique codes per job (like site supervisors manually ensuring subs sign something per area). But it’s inefficient and error-prone.

Ideal Solution Vision

A digital check-in system specifically designed for subcontractors. It would issue unique QR codes per job area (since a single site like a mall can have multiple jobs) that workers scan to check in/out. This gives a granular log of time spent on each specific job by each subcontractor employee. Then, when a subcontractor submits an invoice claiming "X hours by Y workers," the GC can cross-verify against the system's records and only pay for what's verified.

Gina basically described this: if someone didn't scan in, they wouldn't get paid for that claim. (Also, the system would track which individuals came so it could flag if someone's induction or insurance expired – ideally blocking them from checking in until resolved; this could be a separate usecase/product on its own).

The value is straightforward, prevent overbilling (which directly improves the GC's margin on the project) and ensure compliance (reducing risk of fines or accidents).

Value Proposition to Validate

"Swift Check-In provides undeniable proof of work for every subcontractor, saving GCs 10-15% on payout by eliminating overcharges." Gina (prospect) herself suggested it could save 10-15% on sub invoices, which for a company managing say $2M in sub contracts a year is ~$200-300k – huge value. Even a smaller firm with $500k in sub labor could save $50k.

If our software charged even $500/month, that's $6k/year – a fraction of the savings (ROI ~10x or more). It's compelling. They also gain peace of mind and less admin reconciliation. One can imagine them telling their clients (like mall owners) that "we have a system to ensure no fraudulent billing," which could differentiate them. (This was similar scenario to drilling contractors wanting to digitise their operation and system where they would use that fact to secure contracts)

Key Requirements for Profile B:

- Ability to generate and place multiple QR codes in different areas of a site, corresponding to different jobs. The system must record not just location but which job a person is clocking into; ie. Job-specific QR code check-in
- Real-time view of who is on site (and on which job) for the GC's project managers. Possibly with geofence or periodic check (to avoid someone checking in then leaving).
- Easy way to export or view total hours per subcontractor company, per job, per period – to match against invoices. Possibly even an approval workflow where subs' hours are confirmed by the system data.
- Store each subcontractor worker's induction status, licenses, etc. – and block check-in if not compliant (or at least flag it). This ensures only approved folks are on site - This could be a separate module/product.
- Likely just scanning a QR with a phone camera and maybe a one-tap web form to sign in (no lengthy forms every time). Possibly an app if needed, but might be better app-less via QR to web to reduce barriers.
- Since the GC's ROI is tied to project volume, the software might charge per project or monthly flat fee rather than per user. GCs won't pay per sub user because subs are transient; a model like "$X per month per active project site" could align with value.

Hyperfocusing on Customer Profiles

These two profiles represent fundamentally different businesses with distinct operational models, financial drivers, and technological needs. Profile A is solving an internal HR and project management problem. Profile B is solving an external, third-party financial verification problem. Attempting to build, market, and sell a single product to both has resulted in a confused value proposition that fully satisfies neither.

A strategic choice should be made for the initial beachhead to get traction unless we are confident we can do both.

Attribute	***"Overtime & Overrun" Contractor***	***"Subcontractor Verification"***
Industry Vertical	Electrical, Plumbing, Project-Based Trades	Commercial Fitout, Shopfitting, Subcontractor-Heavy GC
Workforce Focus	Internal Employees (Payroll)	External Subcontractors (Invoices)
Economic Champion	Director / Owner	Director / Operations Manager
Core Business Driver	Protecting Project Profit Margins	Ensuring Invoice Accuracy & Financial Control
Primary Pain Point	Uncontrolled overtime costs and fraudulent timesheets from internal employees.	Overbilling and lack of verification for subcontractor invoices.
Key Feature Requirements	Exception-based alerts for overtime/lateness, seamless payroll integration (MYOB/Xero), individual accountability.	Job-specific QR codes for granular tracking, simple web-based check-in for subbies, robust attendance reports for invoice verification.
"How They Talk"	"We only care about the overtime." "We need to be able to go down a disciplinary route with them if they are completing fraudulent time sheets."	"We need to know exactly how many were there... so that when we receive the invoice from them, we know that invoice is correct."

The single most critical action for Swift Check-in is to abandon the "all-in-one" strategy and commit to solving one problem for one of these personas. The leadership team must convene and make a decisive choice.

Go-to-Market Engine Audit

Pipeline Development Audit (Outbound)

The diagnostic data shows an alarming picture of the outbound cold-call campaign: hundreds of dials, almost zero results. 592 cold calls were made, 35% connected to someone, 99 conversations with decision-makers occurred – and 0 meetings were booked. That is a 0% conversion on actual conversations.

The funnel "leaks" at every stage, as illustrated below:

- ***Lead Sourcing:*** The SDR was calling through generic lists (e.g. contacts from Yellow Pages). This is extremely low intent data – essentially like cold-calling a phone book. Many contacts were not even proper targets (e.g., wrong industries, too large/small).
    - Wasted effort on people who were never likely to buy. The targeting was not ICP-specific at all.
- ***Initial Contact (Cold Call):*** Of those called, ~35% picked up – a decent reach rate. However, the approach on the call immediately failed to generate interest. The SDR's opening line was a generic product pitch: "Hi, I'm from Swift Check-In, we do automated timesheets and scheduling...". This led prospects to quickly brush off the call, often saying "we already have that." Indeed, our SDR logs noted immediate objections like "We use Simpro, not interested." The script essentially commoditized us in one sentence.
    - The value proposition was not coming across; instead, we positioned ourselves as just another software, triggering the "I'm fine with what I have" response.
- ***Initial Contact (Email):*** Outbound email activity was low. A review of the Sales Manager's outreach revealed excessively long emails lacking clarity and personalization. Lengthy emails are ineffective for outbound efforts specially into a trades market where people are time poor and have low attention spans thus do not yield positive results.
- ***Objection Handling:*** When prospects raised objections (e.g., "We already use Simpro"), the SDR struggled to offer any compelling response. With no niche value prop at hand, the calls quickly died. There was little attempt or ability to steer the conversation toward the prospect's pain. For instance, a skilled rep might

respond, “Understood – many of our clients used Simpro but still had issues with [pain point]. Can I ask how you handle that today?” Our SDR did not do this, partly due to lack of training and partly because we hadn’t defined a specific pain to focus on.

    - Once the prospect voiced an objection, the call was essentially over – no techniques were used to re-engage interest.

- ***Trust & Rapport:*** Several tactical errors hurt the chances of building rapport. The calls began with an automated “this call will be recorded” message, which immediately puts people on edge for a cold call. Then, the SDR’s accent and script reading gave a telemarketing vibe – not ideal for a local industry that values personal connection. Additionally, prospects had zero prior familiarity with Swift Check-In so it was truly ice cold.

    - The combination of a jarring intro and a lack of contextual marketing made the SDR’s job near impossible – prospects were defensive from the outset.

- ***Follow-up (or none)***: The data shows that over 80% of prospects were only called once. There was virtually no multi-touch cadence (calls, voicemails, follow-up emails) executed. If the person didn’t say “yes” on that first cold call, they were essentially dropped. This is a huge miss as in B2B sales, it often takes 5-8 touches to engage a busy prospect. The SDR process lacked any structured follow-up plan, and the CRM had few if any scheduled callbacks or sequences.

    - Potentially interested prospects who didn’t engage on call 1 were never nurtured; a lot of effort was wasted by not persisting systematically.

Area	What We're Currently Doing	Reaction	The Result
Lack of orchestration outreach and followup	The SDR calls are happening in a vacuum via calls only and there is no structured follow up.	Prospects have no prior context or brand awareness. The call is a completely cold interruption with no familiarity.	The SDR has to do all the heavy lifting of building trust and educating the prospect from a standing start, making an already difficult job nearly impossible.
Leading with features, not problems	Starting the call with a feature dump: "Hi, I'm from Swift Check-in, we do automated timesheets and scheduling..."	Positions us as a generic software commodity. The prospect immediately thinks, "I already have that," and tunes out.	We invite immediate objections and fail to create any curiosity or establish value.
Ineffective objection handling	When a prospect says, "We already use Simpro," our SDR struggles to differentiate or offer a compelling reason to look at an alternative.	The prospect's belief that they don't need us is reinforced. They feel justified in ending the call.	The conversation stalls, and the SDR has no clear path forward.
Creating mistrust from start	Starting every call with an automated "This call will be recorded..." message and using an SDR with a thick overseas accent.	The call feels impersonal, untrustworthy, and immediately puts the prospect on the defensive. It breaks rapport before it can be built.	We create a barrier to genuine conversation, making it much harder to connect with the Australian tradie market.
Asking for the demo too soon	Pushing for a demo without first understanding the prospect's needs or building any interest in our solution.	The request feels like a waste of their time. They see no value in the demo because we haven't shown them a problem we can solve.	A quick "no" and a missed opportunity to have a meaningful discovery conversation.

In summary, initial outbound sales efforts, a "spray-and-pray" approach, failed to generate meetings, wasting SDR resources and potentially damaging our brand.

To fix this, outbound sales needs a complete overhaul: highly targeted lists, personalized outreach focused on pain points, and a multi-touch cadence. Initially, Boney or senior staff should handle early sales to refine the pitch and gather customer insights. If successful, SDRs can be reintroduced with better training and scripts.

For now, SDR calls should be paused to prioritize direct strategies for acquiring pilot customers.

Pipeline Conversion Audit (Demo to Close)

Swift Check-In has conducted numerous product demos (either from cold call hand-offs or inbound inquiries), yet none have closed to a sale. By reviewing call recordings and notes, a pattern emerges explaining why demoed prospects do not convert them to buyers: the sales process was feature-led instead of problem-led, and there was no structured closing strategy or next-step push.

Key observations:

- ***Poor Discovery & Control:*** The demo calls often lacked an upfront discovery or agenda-setting. Instead of confirming the prospect's biggest pain and then tailoring the demo to it, we often launched into "let me show you how it works." In one case, the prospect talked at length about their business initially but questioning was ineffective to uncover pain. Later, when we did discover a key pain mid-demo (overtime control), the demo had to be awkwardly steered back to it.
    - Not controlling the conversation from the start meant we failed to highlight how the product addresses the prospect's specific problem until they explicitly asked. A well-run sales call would have established, "Your key issue is X, today we'll show you how we solve X," but that didn't happen until the prospect pulled it out of us.
- ***Feature Dump Demo:*** The demos show the entire platform, every feature and module in a grand tour. This often overwhelmed or bored the prospect, as many features were not relevant to their specific needs. For example, in one call with Slyco, the prospect only cared about check-in and compliance, but the demo also went through scheduling and budgeting modules, which prompted confusion. In another with Current, complex scheduling interfaces were shown when the prospect was only concerned about timesheet/overtime – leading Steve to interject to refocus.
    - Prospects did not clearly see their problem being solved; they saw a generic tool that they had to mentally map to their problem. This diluted the value proposition in their mind.
- **No Value Framing or ROI Discussion:** Pricing was discussed only when prospects asked "How much does it cost?", to which the response was "it depends on... it depends on the motives that you're required" (an unclear answer). Due to the lack of discovery and understanding of ROI , this diversion made us look unprepared or lacking confidence. Importantly, at no point was price framed relative to value. In a consultative sale, after hearing their pain (e.g. $50k overtime overruns last year), one would position pricing like "We charge $X, which for you would pay back after preventing just Y hours of overtime." Instead, our approach left price as a mystery and separate from the problem.

    - Prospects likely left demos unsure of whether the cost would be justified – not a good sign. Also, the ambiguous answer could erode trust ("why can't they just tell me what it costs?")..

- ***Lack of Next-Step & Follow-Through:*** Many demos ended with a passive close like, "We can set you up with a trial, let us know." There wasn't a strong call to action or defined next step (e.g. "How about we do a 2-week pilot on your site A, starting next Monday? I'll be on-site to help."). Also, after demos, follow-up was inconsistent – some got an email with a recap or a generic brochure, but then prospects often went quiet. We did not have a structured follow-up cadence for post-demo nurture.
    - Deals likely lost momentum and died silently after the demo. The prospects didn't have enough urgency or concrete next step, and we didn't push to schedule one, so interest faded.
- ***No Formal Pipeline Management:*** Our HubSpot deals board exists but had no clear stages beyond Demo, Trial, Close. But the criteria for moving stages or actions at each stage were undefined. It appears no trial was actually structured – if someone said "we might try this," it went to 'Trial' stage but without a start/end plan. This lack of sales process meant opportunities were not systematically worked.
    - Our internal focus perhaps went back to product dev, and deals weren't actively pursued; hence no closure.

Overall, the sales execution has been "show up and throw up" rather than consultative selling. This is common but must be corrected. The prospects basically had to convince themselves why they needed the product, instead of us artfully leading them to that conclusion. A particularly telling moment: in the Current Group demo, Steve literally had to say what he wanted ("I just care when they arrive and leave") to redirect us. We should have led with that.

Fixes & Actions: With our new focus, we will redesign the demo approach:

- **Pre-Demo Discovery:** Always spend the first 10 minutes asking targeted questions about their current process, pains, and quantifying the pain (e.g., "How much overtime did you pay last month? How do you handle timesheets now?"). Listen and take notes; this will be used to tailor the demo and later to frame value. For inbound leads, perhaps do a separate discovery call first before a technical demo.

- **Problem-First Demo Flow:** Start the demo by literally stating the prospect's top

problem in their words and promising to show how we solve it. E.g., "You mentioned you often don't know about overtime until payroll – I'll begin by showing how Swift Check-In alerts managers in real-time to overtime situations." Then show the minimal screens to demonstrate that scenario (e.g., an employee clocking out late and an alert being generated). Hide irrelevant modules – log into a pre-set account configured to simulate their use-case only. Keep the demo short and focused (20-30 min max). Extra features can be mentioned only if they ask or if they support the main value (like "by the way, all this data flows to MYOB automatically – no data entry").

- **ROI & Pricing Discussion:** If we have clear ROI established already, then proceed to pricing. Otherwise, we would need to set a time to better understand the operations. And even then, before talking numbers, recap value: "From what you shared, reducing even half of your overtime could save you ~$30k a year. Our solution for a company of your size costs about $X per year, so you'd be getting a tenfold return on investment." Then give a clear pricing tier or pilot offer. E.g., "Our standard pricing is $10 per user/month, so for 25 employees about $250/month. However, as a pilot customer, we'd like to offer you a 3-month trial at a flat $500 total to prove the value." This ties cost to value and gives them a low-risk entry, making it easier to say yes.

- **Clear Next Step:** Always end the meeting with a specific ask: either schedule a follow-up (for multi-stakeholder deals) or propose a start: "Shall we get you started on a pilot? We can get your account set up this week and do a training session with your crew on Monday." Essentially assume they want to move forward (if the demo went well) and guide them. If they need to think, schedule a check-in call a week later on the spot.

- **Pipeline Discipline:** Implement a simple stage exit criteria – e.g., Demo Done -> Proposal Sent or Pilot Offered; Trial -> must have start/end date and success criteria agreed, etc. Use HubSpot tasks to remind follow-ups. No prospect should go dark without at least a couple of attempts to re-engage with new info. If someone doesn't buy, get feedback why and log it ("using competitor X, no budget, etc."). This will help refine our approach.

Implementing these improvements should dramatically increase our conversion from meetings to pilots and pilots to actual paid contracts, especially once the product meets the promised capabilities. We have an advantage now: a very clear value story (once focused on ICP A) that we can confidently tell, rather than meandering through features.

Tactic	What We're Currently Doing	Reaction	Result
Call Opening	Start with small talk, then ask broad, open-ended questions like "tell me about your business."	The prospect gives a long, unfocused answer. We lose control of the call from the start.	No Agenda, No Control
Discovery Phase	We are asking disjointed closed engaged questions and not getting a chance to uncover pain. No flow.	The true, underlying financial pain is never uncovered. The demo isn't tailored to their real needs.	No Business Case (ROI)
The Demo	Give a "grand tour" of the entire platform, showcasing every feature and module.	Becomes confused, overwhelmed, or bored by irrelevant features.	Diluted Value Proposition
Handling Objections	When they say they have other systems (Fergus, Procore, Hammertech), we don't have a strong, differentiated response.	Assumes we are just another "me-too" product with no unique advantage.	Perceived as a Commodity
The Close	End the call with a passive "we can set you up with a trial, let us know."	Feels no urgency or compelling reason to prioritize the next step.	Deal Stalls, No Momentum

Marketing & Demand Generation

The marketing efforts (primarily digital ads and the website) to date have not generated any meaningful leads or ROI.

I assessed web analytics and campaign data to find:

- **Website Representation:** A notable strength for Swift Check-In lies in its website representation. The current website delivers an exceptionally professional and high-quality first impression, which is vital for establishing credibility and trust among potential customers. The design aesthetics are clean, modern, and align well with industry expectations and makes the company look more established thus creating trust.
- **Paid Advertising:** The team experimented with Google Ads and Reddit Ads driving traffic to landing pages. Analytics shows Reddit ad campaigns got some clicks but those visitors spent mere seconds on the landing page – indicating they bounced immediately. Engagement rates were often <10% (meaning 90% left without interacting). This suggests a mismatch of message-to-audience: perhaps the ad wasn't attracting the right people, or the landing page content didn't resonate with those who clicked. Possibly advertising on Reddit (which skews to consumer or tech audiences) for a construction B2B product was misguided.
    - ROI: Given no conversions and low engagement, every dollar spent was essentially wasted. We should cut these campaigns (as already decided) until strategy is refined.
- **SEO and Organic:** The website has been getting impressions on Google for relevant keywords (like "contractor management software" etc.), but the click-through-rate (CTR) is near zero.

  Also, being an unknown brand against known competitors in search results might hinder clicks. Those who did click mostly landed on the homepage or generic pages (not on a tailored landing page per keyword). The site had about 4,228 sessions in a period, with top sources being direct (people directly entering URL or clicking a link) and organic search. Average time on homepage via organic was only ~12 seconds, which implies they likely left immediately – possibly because the homepage message was not immediately clear or relevant. On the other hand, a small number of users who landed on a specific comparison page ("swift-checkin vs simpro") spent 3+ minutes, indicating that type of content was engaging.
    - We need to overhaul the website messaging for clarity, and likely create targeted landing pages for our ICP's specific queries (e.g. "timesheet software for construction overtime" etc.). Also, content like comparison

pages or blog articles could attract the right people if optimized. However, this can be done once we have completed the initial sprint focusing on a highly sales-led outbound motion.

- **Content and Social:** There have been LinkedIn posts and feature videos (as per the team's notes), but consistency and targeting are issues. Posting generic product updates on LinkedIn won't yield leads unless it's hitting the pain point of our ICP and reaching them. The website lacks case studies or educational content that speaks to our customer's problems (e.g. "Top 5 ways to cut overtime in construction projects"). That kind of content could draw our ICP in. Right now, our marketing comes off as feature-centric and random.

- **Marketing Spend vs. Return:** Financially, we spent on Google Ads (some clicks, no conversions), LinkedIn maybe (unclear), and definitely Reddit Ads as. The exact spend I'm not privy to however this, combined with the SDR cost, forms the bulk of wasted burn.

Website Engagement

Session Source / Medium	Page They Land On	Sessions	Avg. Engagement Time
(direct) / (none)	/ (Homepage)	422	48.6 seconds
google / organic	/ (Homepage)	390	12.6 seconds
(direct) / (none)	/features	158	59.8 seconds
google / cpc	/features	91	15 min 49 sec
linkedin.com / referral	/swift-checkin-vs-simpro	15	3 min 25 sec

Reddit Ads Performance

Page They Land On	Sessions	Avg. Engagement
/timesheets-lp	148	0.2 seconds
/scheduling-lp	129	0.5 seconds
/scheduling-allocation-lp	39	0.9 seconds
/timesheets-admin-chaos-lp	52	1.1 seconds

SEO Performance

Search Query	Impressions	Clicks	Position
Contractor Management Software	2161	0	46
Contractor Management Software Australia	1386	1	14
Subcontractor Management Software Australia	535	0	16
Contractor management App	432	0	60
Contractor software	400	0	21

In summary, marketing needs to shift from broad and passive to targeted and supportive. We likely overspent on top-of-funnel awareness without having product-market fit; now we should spend almost nothing on ads and instead invest time in content and website tweaks that align to our niche value proposition.

Once we have established revenue traction, we can revisit a scaled marketing plan, but for now the motto is "market by educating the customer about their problem and our solution" in very specific terms.

Revenue Operations Audit

"Revenue operations" refers to the systems and processes to manage leads and customers through the funnel. Currently, our RevOps is rudimentary and needs improvement to ensure nothing falls through cracks as we execute the new strategy:

- **CRM Usage:** We have HubSpot, but as noted, it wasn't being used to full potential. For instance, many leads/prospects did not have follow-up tasks set, stages were not clearly defined, and data like "why lost" was often blank for closed deals. We need to clean up the CRM to focus on the new ICP: update fields to track ICP category, pain point, status, etc.
- **Follow-up Cadence:** Implement a structured cadence for both outbound and post-demo: e.g., Day 1 call, Day 3 email, Day 7 call again, etc., with content at each touch (like sending that blog on overtime cost after a call).

Given the low volume of deals we're dealing with, these processes don't need to be complex – just diligently executed. The key is to not let any hot prospect cool off due to our neglect, and to systematically learn and refine our approach with each engagement.

Strategic Recommendations

1. The single most critical action for Swift Check-in is to abandon the "all-in-one" strategy and commit to hyperfocusing on the "One Problem, One Persona" mandate. This requires a decisive strategic choice between the two high-potential ICPs - or committing to both.
2. This alongside the refactor of the Sales/Marketing (GTM) to be problem and customer centric focused on solution selling so that all messaging makes the customer feel seen.
3. And finally, realigning the team and the mindsets, particularly on the hyperfocus. Everyone should understand the mission: X customers or bust – which unites focus.