6. Marketing Strategy

*Quote: What must our business be in the minds of our customers in order for them to choose us over everyone else. Your marketing strategy and business starts, ends, lives, and dies with your customer.* ***Nothing else matters****.*

# Customer Profile

### Segment

**Customer:** Small Business Owners  
**Demographics:** Typically male over 30  
**Psychographics:** Swamped, running around putting out fires, has not taken a holiday in years too scared that something will break while they are away, living from day-to-day.  
**Industry:** Engineering, Manufacturing, Trade Services  
**Business Size:** 5 - 200 staff  
**Business Type:** Sell and/or manufacturers of industrial equipment - supply, install, maintain. IE: Large industrial Air Conditioners, Pumps for irrigation, Mining equipment, Weighbridges, Electric Car Charging stations, etc.  
**Technographics:** Currently uses Xero or Odoo and possibly a host of other software tools

### Utopia

Have the business run without them. Total financial independence. Take holidays whenever they want to wherever they want not matter the cost in time or money.  
Can be involved in the business as much or as little as they want.

### Obstacles

* Tacit knowledge is everywhere in everyone's heads.
* There are inconsistencies with how various staff carry out tasks.
* Dependant on key people who, if they leave, would certainly disrupt the business
* High turnover of staff means that the boss it constantly retraining people resulting in lost time and money.
* He loves the hustle and bustle of sorting out issues, barking orders, and working IN the business. He does not have the time or energy to work ON the business.
* Constantly stressed will put pressure on his health and relationships
* He feels he needs to be there all the time or everything will come crashing down. He need to inspect every outgoing order to ensure it is right. He needs to be seen around the factory or the staff will bludge or do things half arsed.
* Does not have the free time to develop the business any further so has subconsciously decided that this is the maximum he can scale.
* Pays for a plethora of small, standalone applications which cannot be fully integrated without human intervention. Many of these apps have been requested by office staff who insist on them although he is not clear on why they are really needed. It's easier to pay than to argue.
* In its current state, no-one would be interested in buying the business. There is too much work for the owner and too much reliance on key staff.

### Offer

TODO  
An offer they would feel stupid to refuse  
start small and up-sell when prospect trusts us.  
Free assessment??

### Services

#### Free Assessment

##### Objective

Provide the owner with a current state assessment, a potential achievable future state with detailed steps, time frame, and Return on Investment (ROI) to achieve the future state.

##### Process

* Pre-Visit
  + Review org chart
  + Review existing documentation
  + Draft key questions and areas of investigation
  + Schedule interviews
* On-site
  + Interview key people
  + Validate documented processes against actual practices
  + Identify gaps or Single Points of Failure (SPOF)
* Post-Visit
  + Build Draft Report
    - Assess finding
    - Gap Analysis
    - Create action plan
    - Cost recommendations
  + Walk through draft report with Owner
  + Make adjustments
* On-site
  + Deliver final report in person

#### Odoo Scoping Service

* Some BA service to scope migration project to Odoo

#### Retainer

* 12 Month contract for ongoing support
* Monthly fee includes X hours per month non-accumulative
* Annual upgrade of Odoo included in the retainer fee (excludes third party app)

#### Projects including Development

* Project management oversight
* Some soft of charge for development of new apps, reports, templates, etc.

#### Migration Projects

* Must migrate from Xero to Odoo only. We do not do any other migrations.
* Retainer contract agreement is not bundled but must be included.

## Leads

### Lead Generation

* TODO Facebook ads
  + Given the demographic, I believe FB is the most likely place to spend on advertisements. Insta, ticktok seems to me to be a younger crowd. LI is a different audience.
* Current 8 week campaign
  + Write blog and 3 tips
    - Where: website
    - When: Mon
  + Post to socials new blog posts
    - Where: Facebook, LinkedIn, Insta
    - When: Tue
  + 3 x automation tip posts to socials
    - Where: Facebook, LinkedIn, Insta
    - When: Wed, Thur, Fri
  + Week 1 complete
* Open to suggestions  
  Notes:
* have considered Firmable (<https://www.firmable.com>) however found the data to be quite old.
* I've always been skeptical about buying mail lists.

### Lead to Conversions

Entice the target prospect, a small business owner, through offering small automation and build trust. Small, easy to do, modest profit, charge just enough to cover expenses and a bit of buffer. Then, when we have rapport and trust, we can up-sell them on more lucrative offerings.  
Small automation:

* Use Make.com or IFTTT to connect their Facebook Ads to their google sheets or CRM software.
* Possibly some analysis involving AI of leads or opportunities
* Possibly see our weekly tips and blog posts for ideas.

### Budget

Today, basically $0. Fund are extremely tight at the moment - long story...  
In the short term, there will be modest funds I can commit so we will be operating on a shoe string. There is a possibility of an injection in 3 to 6 months but lets forget about that for now.  
We need the marketing to be self-supporting. The more conversions, the more we can pump into marketing campaigns etc. I would like to use a reasonable percentage of profit generated to be put back into marketing. Therefore, as the profit grows, so does the marketing opportunities.

### Outsourcing Marketing Thoughts

Paying a fee based on lead generation will produce quantity with low quality

* Needs to be extremely cheap per lead!  
  Paying a fee based on sales will produce low quantity with high quality.
* Can be priced proportionally to the value of the sale.  
  In either case, the engagement should be no longer than 6 months during which the process will be replicated internally. From that time onwards, all marketing will be in-sourced.

## Practice

#### Identification

Specifically, who are your current or potential customers?  
What is their profile

* Demographic
* Psychographic
* Geographic  
  What other brands or products do they buy and why are they appealing? What traits do they look for in a product they have purchased in the past? Consider what selling methods are already appealing to them?