

## **Business Model: Stock Investment Online Consulting**

### **Introduction:**

- **Description:** Stock Investment Online Consulting is a business that provides expert guidance and advice to individuals seeking to invest in the stock market. The business operates primarily through an online platform, connecting investors with experienced consultants who can help them make informed investment decisions. The primary activity of the business is to offer consulting services to clients who want assistance with their stock market investments.
- **Revenue:** The primary revenue stream comes from charging consulting fees for the services provided. Fees may be based on hourly rates, subscription models, or a percentage of the client's investment portfolio. Other flows include: Portfolio Management Fees, Referral Commissions,...

### **Stage 1: Situation Analysis**

#### **SWOT**

##### **Strengths:**

- Knowledgeable, individualized direction.
- Scalability and a broader audience.
- Easy access for customers.
- Customized investing plans.

##### **Weaknesses:**

- Little in-person interaction..
- Reliance on technology.
- Difficulties in verifying the accuracy of the data.

##### **Opportunities:**

- An increasing need for professional assistance due to market volatility. Growing demand for financial advice.
- Machine learning-enhanced prediction abilities and tailored services.

##### **Threats:**

- Rapid technological advancements in the machine learning industry.
- Compliance and legal risks.
- Investor confidence is impacted by economic downturns.

### ***How are we performing?***

- 300+ new users every month
- 2000+ active users
- One of the best new consulting online platform on the internet

***What are our distinctive competitive (marketing) advantages?***

- Scalability, global reach, knowledge, and tailored guidance.
- Advanced Machine Learning and Data Analysis.
- Regulatory Change Adaptation.
- Making Use of Market Volatility.

***How effective is our Marketing Mix***

- Product:
  - Highlight the consultants' research capabilities and ability
  - Portfolio Management
  - Provide informative tutorials, guides, and downloadable resources
- Price:
  - Set reasonable and competitive prices
  - Offer premium educational content at higher price points
  - Charge a percentage of the client's investment portfolio
- Place:
  - Allowing clients to access the services on-the-go.
  - Well-designed, intuitive, and user-friendly online platform
- Promotion
  - Maintaining active profiles on popular social media platforms
  - Webinars and Speaking Engagements
  - Collaborate with financial institutions, brokerage firms,...

***Are we focusing on the best segments with the right type of customer?***

The business will focus on two main customer segments:

- Investors: Individuals investors and High-Net-Worth individuals seeking professional advice and guidance to make informed investment decisions in the stock market.
- Small business owners: Entrepreneurs and small business owners looking to invest surplus capital in the stock market and seeking expert advice to maximize returns.

***Are we using the most appropriate channels for communication and distribution? (kênh truyền thông phù hợp & lý do)***

- Facebook: Facebook offers plenty of options to find and interact with potential clients, resulting in significant traffic for the company
- TikTok: Provides a cost-efficient approach to connect with and engage potential clients, maximizing the impact of marketing initiatives

***What uncontrollable event(s) or trend(s) can impact my business?***

- Economic conditions

- Regulatory changes
- Technological advancements
- Market competition
- Geopolitical events

## **Stage 2: Set Objectives**

### *Business Mission?*

The mission to empower individuals and businesses to make informed and successful investments in the stock market through personalized consulting services and comprehensive education. By delivering tailored investment strategies, valuable insights, and ongoing support, we aim to help our clients achieve their financial goals and build long-term wealth

### *Business Objectives?*

- Acquire 400 new clients within the next fiscal year.
- Revenue will grow by 20% compared to the previous year..
- Establish partnerships with three major brokerage firms or financial institutions.
- Publish at least 10 thought leadership articles in reputable industry
- Maintain a client satisfaction rating of at least 80%.

### *Marketing Objectives - Business Development?*

- Increase online engagement by achieving a 25% growth in website traffic and social media followers.
- Increase market share: Capture a larger share of the consulting market by acquiring new clients and expanding our client base. Aim to increase market share by 10% within the next year.
- Increase brand recognition by achieving an increase in online brand mentions and social media engagement within the next fiscal year
- Develop strategic partnerships
- Generate 1,000 qualified leads within the next fiscal year
- Foster customer loyalty

### *Marketing Communication Objectives?*

- Increase lead generation and drive conversions by achieving a 25% growth in qualified leads and inquiries.
- Gain positive customer testimonials and online reviews.
- Acquire 8,000 platform-wide subscribers.
- 4,000 social media engagements should be produced.

## **Stage 3: Strategy**

### *Segmentation:*

- Age: Young professionals, middle-aged individuals, and retirees.

- Income: Individuals with disposable income to invest in the stock market.
- Occupation: Salaried employees, business owners, or self-employed individuals.

*Targeting:*

- Young professionals: Tech-savvy, seeking long-term wealth accumulation, open to learning and utilizing digital platforms.
- Middle-aged Individuals: Stable income, focused on retirement planning, looking for expert advice and guidance.

*Positioning:*

- Trusted investment guidance and personalized strategies
- Tailored investment strategies and specialized expertise for affluent individuals with significant investable assets.
- Investment advice and retirement planning solutions for small business owners

#### **Stage 4: Tactical plan**

*Which Communication Tools are we going to use?*

- Facebook & Tiktok
- Email Marketing
- Website and Blog
- Online Advertising
- Webminars and Events

*How are we going to use them?*

- Facebook and TikTok: Share informative material and promote audience participation.
- Email Marketing: Send customized newsletters with information on investments.
- Website and Blog: Maintain an informative website with blog articles on investment strategies.
- Online Advertising: Advertise to certain demographics with eye-catching imagery and copy.
- Webinars and Events: Host educational webinars and live events to engage the audience.

*What message(s) do we wish to communicate?*

- Expertise and Personalized Guidance
- Time-Saving Solution for Informed Investment Decisions.
- Trust and foster long-term relationships with clients.
- User-friendly and secure online platform.
- Data-Driven Strategies for Optimized Returns.

*Are we being consistent across different tools and messages?*

All platforms should consist of the big idea given by the marketing team and follow the campaign road map for the campaign mission “Empower Investors with Expert Guidance for Successful Investment Decisions.”

*Do we have the necessary resources/budgets?*

Resource/Budget Assessment: Evaluate availability of resources and budgets to support marketing objectives and activities.

## **Stage 5: Action plan**

*Who is going to do what?*

- Marketing Team: Create and enhance comprehensive marketing strategies.
- Content Creation: produces interesting and educational stuff relating to coding and programming. Post a video with a hashtag on the Facebook and tiktok sites.
- Social Media Manager: Manage social media content calendars and schedules posts.
- Advertising Manager: controls the management of digital advertising efforts, including display, social media, and Google Ads.
- Event Coordinator: planning and organizing various events, both online and offline,
- Customer Support Team: Offers guidance and support for customers.
- Analytics and Reporting: Collects, analyzes, and interprets data to gain insights into the performance.

*When are they going to do it?*

- Marketing Team: lasting the entire year.
- Content Creation: perpetual creation and publication.
- Social Media Manager: daily administration and involvement.
- Advertising Manager: starting a paid campaign.
- Event Coordinator: hold exhibitions every 3 months.
- Customer Support Team: continue assisting people and gathering comments.
- Analytics and Reporting: Regular monitoring and analysis.

*What is the resource allocation for the action?*

- Marketing Team: 6 individuals who are in charge of carrying out strategy and initiatives.
- Content Creators: 2 content creators responsible for producing engaging content.

- Social Media Manager: Spends 18 hours each week managing social media platforms and engagement.
- Advertising Manager: gives \$2000 for focused advertising initiatives..
- Event Coordinator: Plans and manages 3 exhibitions and events annually..
- Customer Support Team: Consists of 3 members providing ongoing client support.

Budget allocated: 250.000.000 for advertising, content creation, events, and analytics tools. Time and effort allocated based on task requirements and deadlines, with an average of 40 hours per week per team member.

*What are the key performance measurements?*

Key Performance Measurements:

- Website Traffic Increase
- Conversion Rate
- Social Media Engagement
- Customer Satisfaction
- Return on Investment (ROI)
- Cost per Acquisition (CPA)
- Campaign-specific Metrics

These measurements help evaluate marketing effectiveness, customer satisfaction, and financial performance.

*How is the performance going to be recorded?*

- Google Analytics 4
- Tiktok for Business
- Business Department of Company