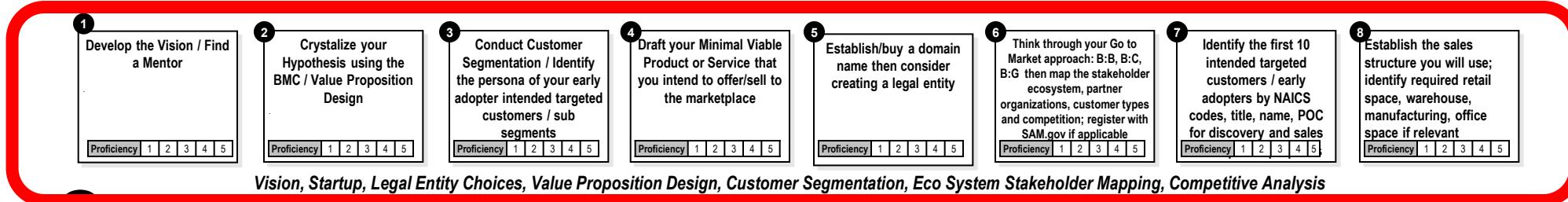


Let's dive in further,  
to this Journey Map,  
and take a closer look at  
*each of the 24 steps,*  
emphasizing  
a few  
points  
along the journey



# “Typical” Small Business Entrepreneurial Journey



Prepare for growth, hyper growth, scaling and / or exiting or negotiating the sale of the business ; succession planning; plans for sale, or exit  
Proficiency 1 2 3 4 5

23 Ensure business is HR compliant; ensure business has the appropriate set of Cybersecurity measures for compliance; set up self audit schedule  
Proficiency 1 2 3 4 5

22 Begin using the structure, approach, frequency of stewardship and key performance metric reporting frequency using the metrics that matter; make business course corrections based on data insights  
Proficiency 1 2 3 4 5

21 Develop Business imperatives for a two year outlook; develop a suite of the fewest correct, simple metrics, conduct stewardship and reporting on regular frequency to track progress.  
Proficiency 1 2 3 4 5

## Self Assessed Proficiency – From Subject Matter Expert to Needing Mentorship

5 = Excellent (We do this regularly, systematically, and with continuous improvement)

4 = Good (We do this regularly and systematically)

3 = Average (We have some skills in this area)

2 = Poor (We do this irregularly and in an ad hoc manner)

1 = Nonexistent (We do not have these skills at all)



## Customer Discovery, Validating the Hypothesis, Early Adopter

9 Launch Customer Discovery Process ; ask “is Intellectual Property” relevant? List / assess discovery lessons learned  
Proficiency 1 2 3 4 5

10 Using learnings from 10-30 discovery interviews/discussions, assess the need to “pivot” or stay the course toward your vision  
Proficiency 1 2 3 4 5

11 Determine if licenses, certifications are needed/required; apply for appropriate SDBVOB, SWAM, 8a or other designations would be beneficial  
Proficiency 1 2 3 4 5

12 Develop full cost stack budget estimates per unit being sold; develop rough 1st draft of year 1 revenue projections by month using projected pricing  
Proficiency 1 2 3 4 5

Developing the Business Plan “pitch” Narrative, Financial Projections (Rev. / Cost), Risk, Funding the Business Stages of Marketing Maturity, Business Development, Sales, Operations , Scaling

20 Consider venture growth staffing needs; internships, training, onboarding; prioritize staffing for growth, i.e. business development, operations, etc.  
Proficiency 1 2 3 4 5

19 Identify, assess 5 elements of business risk and build risk mitigation steps for each as relevant; update pitch  
Proficiency 1 2 3 4 5

18 Determine need for access to capital, funding, and how it would be spent; explore grants if appropriate; reflect any loan repayment in cash flow; ref build cap table if relevant; update pitch  
Proficiency 1 2 3 4 5

17 Validate / Refine / Adjust pricing strategy and tactics; revise revenue forecasts accordingly; update 2 year cash flow spreadsheet; update pitch; establish basic book of business accounting  
Proficiency 1 2 3 4 5

16 Refine then choose channels to market strategy; choose relevant channel design; plan to build and host website in accordance with pre-engineered templates and sound hosting platforms  
Proficiency 1 2 3 4 5

15 Create draft marketing plan based on master branding / positioning, product / service brand current and future product/service architecture; conduct message mapping exercise for social media content creation themes executed via editorial calendar execution plan  
Proficiency 1 2 3 4 5

14 Develop a compelling business narrative; synthesize financial projections into modular pitch suitable for multiple business purposes, i.e. sales, raising capital; iterate, refine, build  
Proficiency 1 2 3 4 5

13 Build/Refine Revenue Projections, COGs, Operating Expense Budget into 2 year cash flow spreadsheet; determine sales milestones  
Proficiency 1 2 3 4 5

# Step # 1 Points of Emphasis

*Develop your Vision and Timeline for the business / business imperative or growth objective.*



*Find a mentor or mentors. Get some assistance.*

**Self Assessed Proficiency – From Subject Matter Expert to Needing Mentorship**  
5 = Excellent (We do this regularly, systematically, and with continuous improvement)  
4 = Good (We do this regularly and systematically)  
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1 = Nonexistent (We do not have these skills at all)



"Typical" Roadmap  
4 Broad "themes"  
24 Work Blocks or "Action" Elements  
Self - Assessment "Proficiency Rating"

# Step # 1 Points of Emphasis

## Benefits of finding Mentors early in the Journey

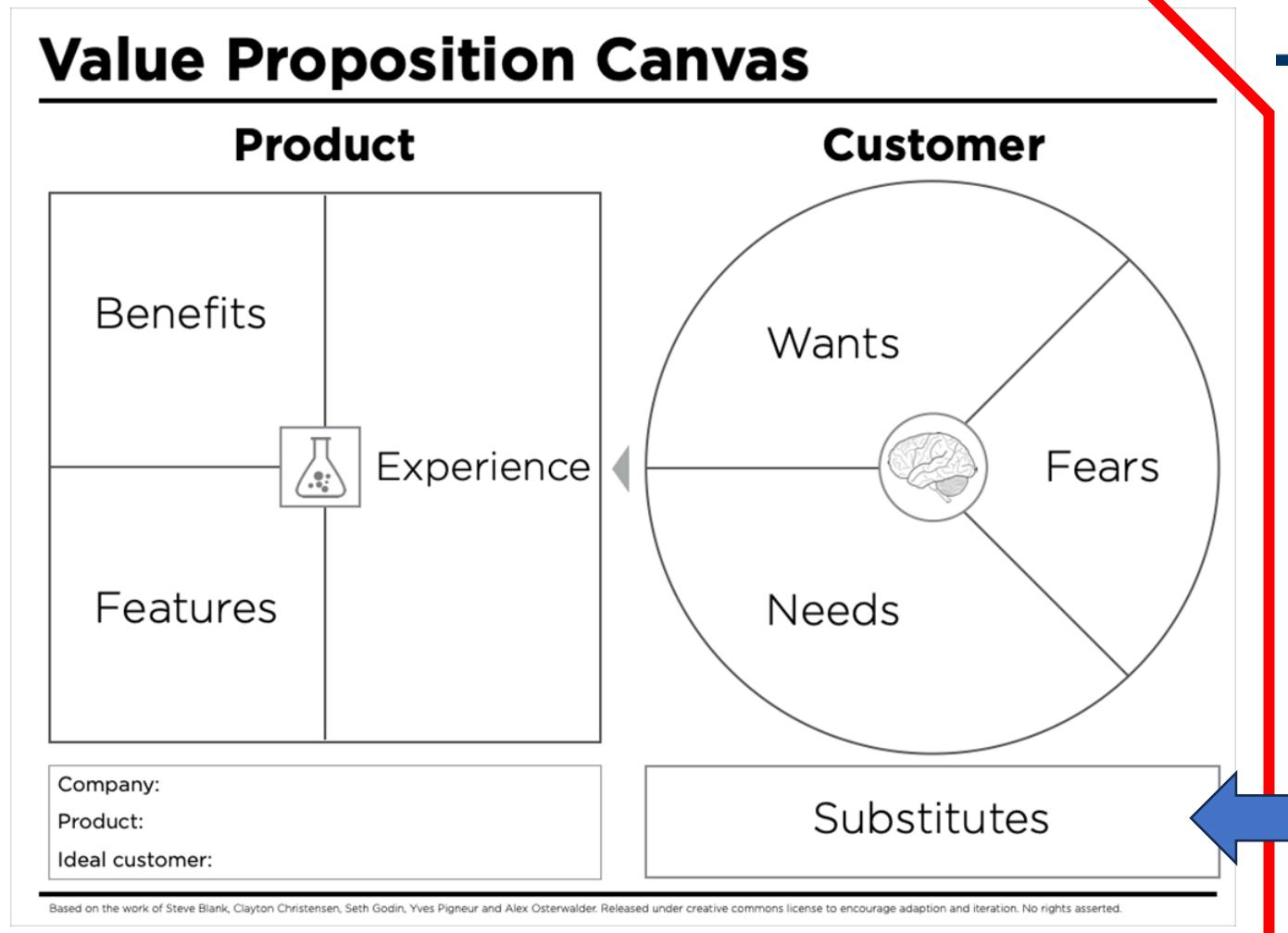
- ✓ Identify pitfalls to avoid, highlight lessons learned from perspective, experiences
- ✓ Potential to shorten the process journey
- ✓ Help stretch and save precious owners investment
- ✓ Make valuable introductions and connections
- ✓ Identify valuable and time saving resources, frameworks
- ✓ Make informed, data driven, actionable decisions
- ✓ Help hold you accountable to milestones and deadlines

Mentors can be guides on your journey !



## Step # 2 - Points of Emphasis

# Complete the Value Proposition Design and worksheet



**This “Typical” Entrepreneurial Journey Map Features:**

**Self-Assessed Proficiency**

5 = Excellent (We do this regularly, systematically, and with continuous improvement)  
 4 = Good (We do this regularly and systematically)  
 3 = Average (We have some skills in this area)  
 2 = Poor (We do this irregularly and in an ad hoc manner)  
 1 = Nonexistent (We do not have these skills at all)

**Developing the Business**

**Scaling**

**Roadmap**

**Broadening**

Did you conduct a thorough side by side comparison of the substitutes, the competition?

## Step # 2 Points of Emphasis

Competitive Comparative Matrix Insights Exercise Template  
NOTE: Create in Excel; minimum of 5 competitors; modify columns as applicable

Competitor Businesses	Website URL Link	Industry/ Sector / Segment Competitor is in	Location Geographic Reach	Phone #	Est. Sales \$USD	Unique Branding	Feature #1	Benefit #1	Point(s) of Differentiation	Sell Through Channels?	Relevant Comments
Competitor # 1											
Competitor # 2											
Competitor # 3											
Competitor # 4											
Competitor # 5											

**It is a Side by Side collection of facts, patterns, themes, etc. that lead to insights, implications and then actions**

```
graph LR; A[Collect Facts] --> B[Look for Patterns]; B --> C[Identify Trends]; C --> D[Look for Insights]; D --> E[Identify Implications]; E --> F[Understand Consequences]; F --> G[Discuss Options]; G --> H[Make Choices / Path]; H --> I[Take Action/Execute];
```

A red circle highlights the steps from 'Look for Insights' to 'Understand Consequences'.



What did you learn from this exercise?

What were your top 3 insights?

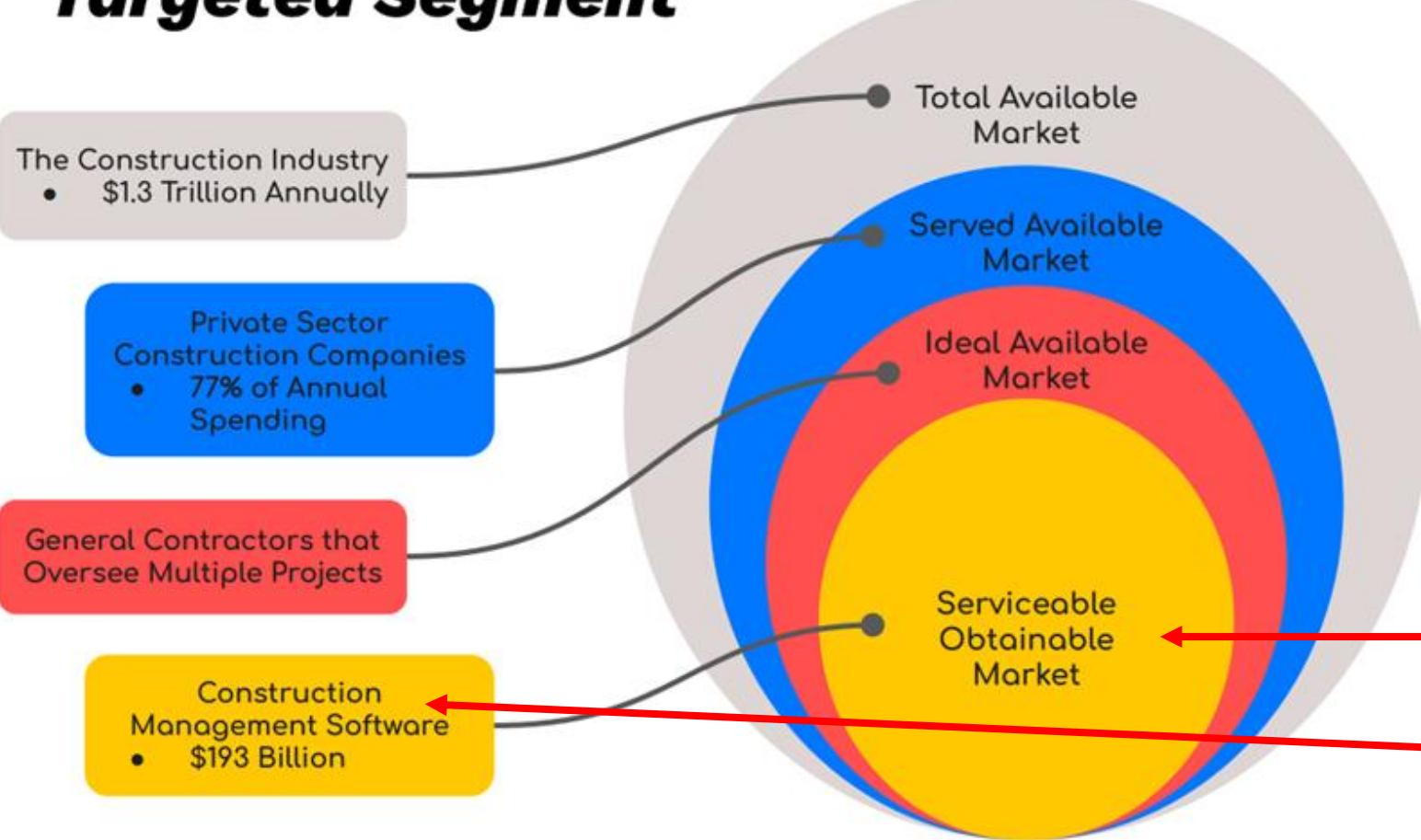
Did those insights have implications?

## Step # 2 - Points of Emphasis



# Step # 3 Points of Emphasis

## ***Targeted Segment***



Now you need to curate a list of your first 5-10 customers!

You need to find the business and the point of contacts!

# Step # 3 Points of Emphasis



**SOL WINDOWS** **Targeted Consumers**

**PAUL RAMIREZ**  
SENIOR PROJECT MANAGER STARTER PACK

POWERED BY ESPRESSO AND RFIs  
CLARK CONSTRUCTION  
INNOVATIVE SUSTAINABLE BUILDING MATERIALS  
INNOVATIVE SUSTAINABLE BUILDING MATERIALS

Is it scalable?  
Is it proven?  
Will it screw with my workflow?

SMART BUILD CONTROL SYSTEM  
DELIVERY TRACKING APP

**Our Buyers**

- Proven, scalable products that don't disrupt workflows
- Deliver sustainable, future-ready buildings on time

**Needs:**  
Reliable supply chain & logistic  
BMS (smart building) compatibility

Using your VPD, develop your intended targeted Customer / client “personas”



Meet our customer, Derek.  
Transportation Director at Community School District

Former school bus driver for 15 years.

Manages \$5.7M/yr (~10% of the district's budget).

Transports 2.7k students with 40 drivers.

communicates with 5k+ parents daily.



## Step # 4 Points of Emphasis

### A Minimal Viable Product (MVP) :

The simplest form of a product or service that still delivers its core value proposition.

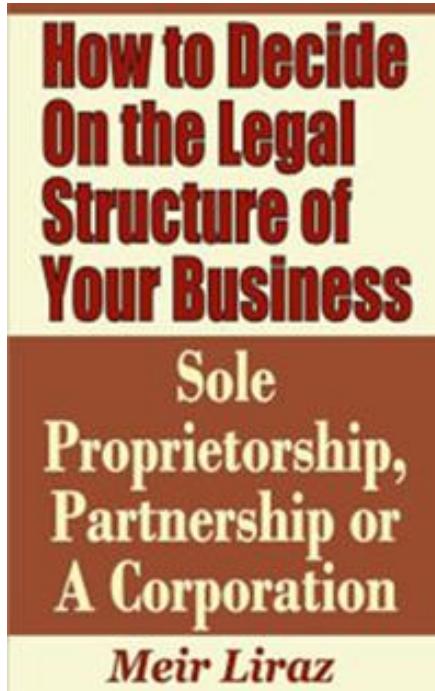
Its purpose is not to be a fully polished or complete product or service.

It allows you to test your primary business assumptions and gather real user feedback -- early on in the journey.



# Step # 5 Points of Emphasis

- *Establish a Domain Name*
- *Consider the implications of your “Master Brand”*
- *Consider creating the most relevant legal entity*
- *Register with the VCC*



# Step # 6 Points of Emphasis

- *Map the EcoSystem in which your business, industry exists*
- *Map all the Stakeholders / Partners / Competitors, etc.*
- *Conduct a comparative competitive analysis*



# Step # 6 Points of Emphasis

Competitive Comparative Matrix Insights Exercise Template  
NOTE: Create in Excel; minimum of 5 competitors; modify columns as applicable

Competitor Businesses	Website URL Link	Industry/ Sector / Segment Competitor is in	Location Geographic Reach	Phone #	Est. Sales \$USD	Unique Branding	Feature #1	Benefit #1	Point(s) of Differentiation	Sell Through Channels?	Relevant Comments
Competitor # 1											
Competitor # 2											
Competitor # 3											
Competitor # 4											
Competitor # 5											

**It is a Side by Side collection of facts, patterns, themes, etc. that lead to insights, implications and then actions**

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graph LR
    A[Collect Facts] --> B[Look for Patterns]
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    C --> D[Look for Insights]
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    E --> F[Understand Consequences]
    F --> G[Discuss Options]
    G --> H[Make Choices / Path]
    H --> I[Take Action/Execute]
    I --> D
    
```

The flowchart illustrates the entrepreneurial journey map. It starts with 'Collect Facts' and 'Look for Patterns', leading to 'Identify Trends' and 'Look for Insights'. This leads to 'Identify Implications' and 'Understand Consequences', which then lead to 'Discuss Options' and 'Make Choices / Path'. Finally, 'Take Action/Execute' leads back to 'Look for Insights'.



## Step # 6 Points of Emphasis

*From your comparative competitive analysis, how is your value proposition :*

- *Differentiated*
- *Novel*
- *Innovative*
- *Unique*
- *Faster*

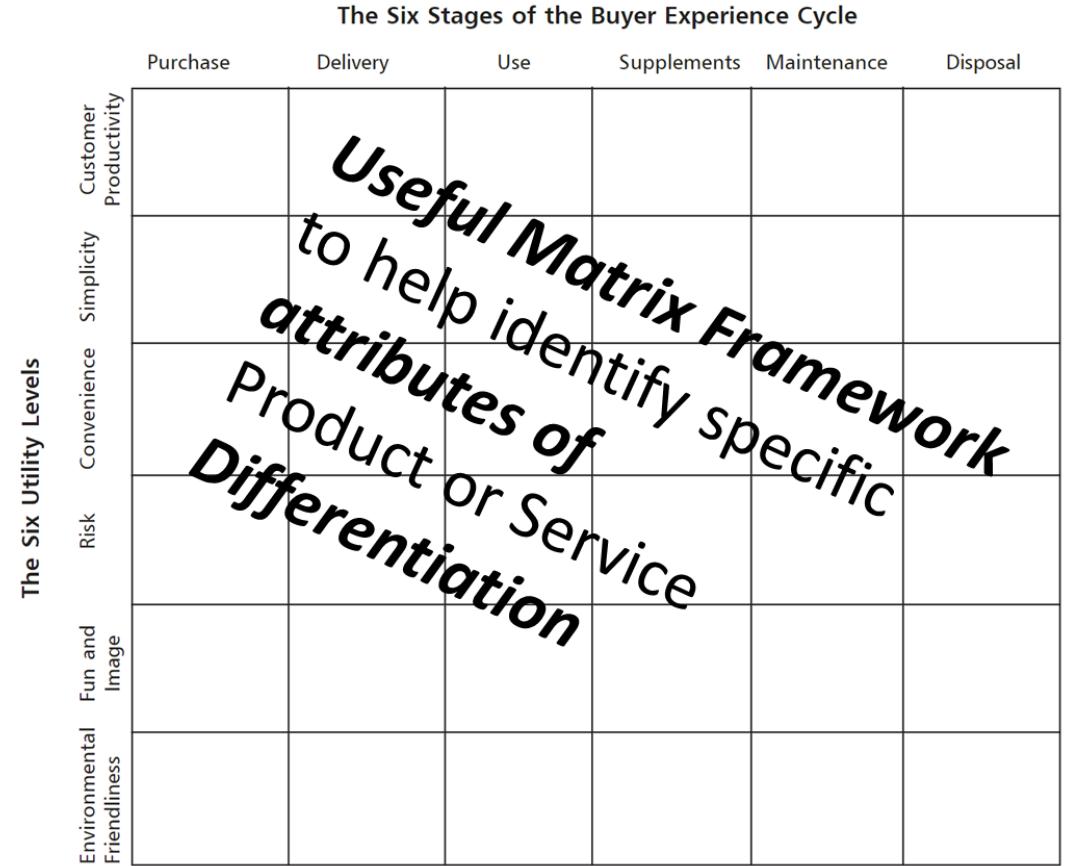
Ask yourself:

***“How is your value proposition to the marketplace as good as or better than the top 3 leading substitutes? “...***

***...in at least 1 dimension***



# Step # 6 Points of Emphasis



Source: Chan Kim and Renee Mauborgne, "Knowing a Winning Business Idea When You See One", <https://hbr.org/2000/09/knowing-a-winning-business-idea-when-you-see-one/ar/1>, September 2000



## How is your value proposition

- *Differentiated*
- *Novel*
- *Unique*
- *Innovative*

**Ask yourself: How are you as good as or better than the top 3 leading substitutes in the marketplace?**

# Step # 7 Points of Emphasis

*From the Value Proposition Design and the customer segmentation, (step #2, 3), identify...*

*... the first 5 to 10 intended targeted customers to approach for customer discovery / and / or early sales*



You will need to curate a list of your first 5-10 customers!

You need to find the business and the POC info:

- Name
- Title
- Email
- Phone #

# Step # 8 Points of Emphasis

**Your proposed “Go To Market GTM” strategy should be considered here:**

- B:B?
- B:C?
- D:C”?
- B:G?

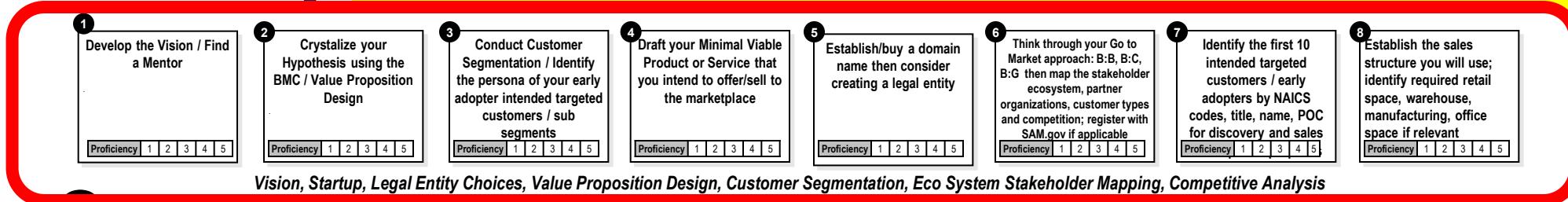
**Ask yourself, “who” in your organizational (now or down the road) will do the Sales Development?**



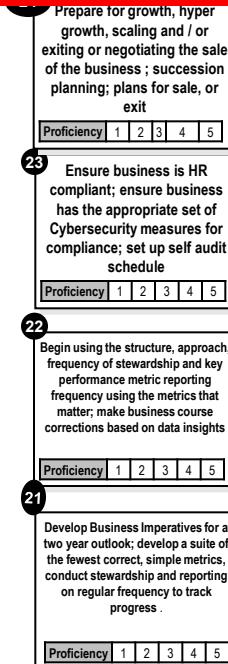
**What is the most appropriate sales structure for your business?**

- Inside Sales?
- Field Sales?
- Technical Sales?
- Outsource Sales to a fractional sale rep?
- Online sales only?
- Sell via intermediary?
- Enterprise Sales?
- Other

# Consider attending MSBDC "How To" Webinars Associated with Phase 1



## Workshops & Events - Mason SBDC



### Strategic Imperatives, Metrics, Cybersecurity

## Anatomy of Small Business Entrepreneurial Journey

### Legal & Admin Steps to Starting a Business

### Value Proposition Design and Message Mapping

### Government Contracting 101

#### Small Business Financing

#### Preparing your Business Briefing / Narrative / Pitch

#### Marketing 101

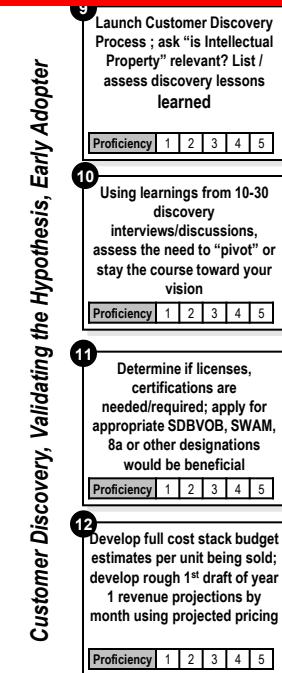
#### Digital Marketing – SEO and Social Media Marketing

#### Accounting, Budgeting, Financial Management

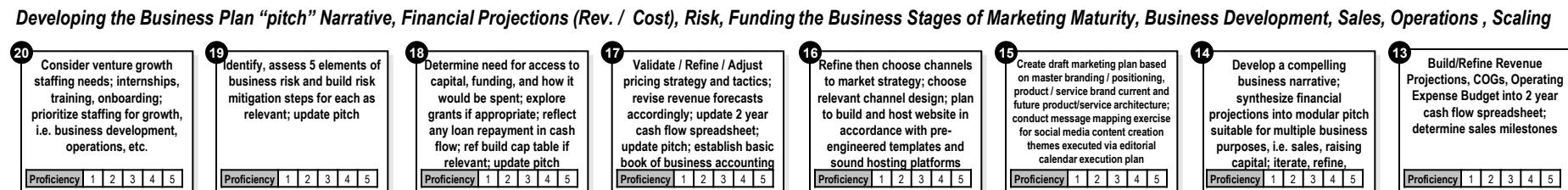
#### Performance Management – Guide to Key Performance Indicators / Biz Dashboards

#### Business Operations: Taxes, HR, Legal, Real Estate, Management, Leadership

#### Cyber Security for Small Business



### Customer Discovery, Validating the Hypothesis, Early Adopter



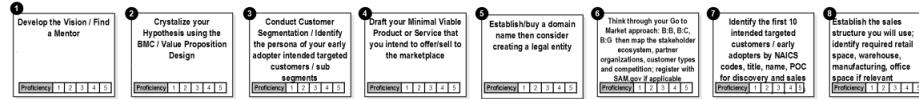


Referencing  
leg 1 of the  
“map”, lets  
pause for  
Questions  
and  
Discussion!

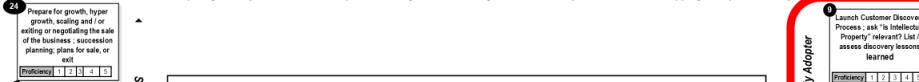
# Leg #2 of the journey

Note:  
Normally this  
would be week  
2....BUT.....

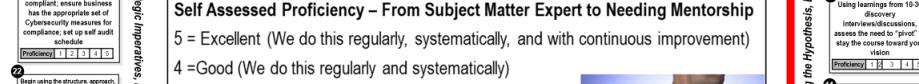
## “Typical” Small Business Entrepreneurial Journey



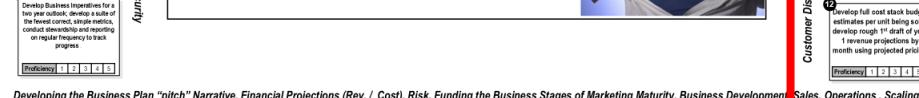
Vision, Startup, Legal Entity Choices, Value Proposition Design, Customer Segmentation, Eco System Stakeholder Mapping, Competitive Analysis



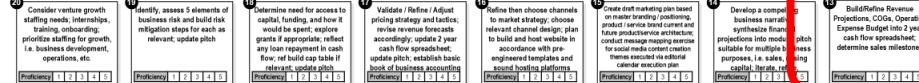
Strategic Imperatives, Metrics, Cybersecurity



Self Assessed Proficiency – From Subject Matter Expert to Needing Mentorship



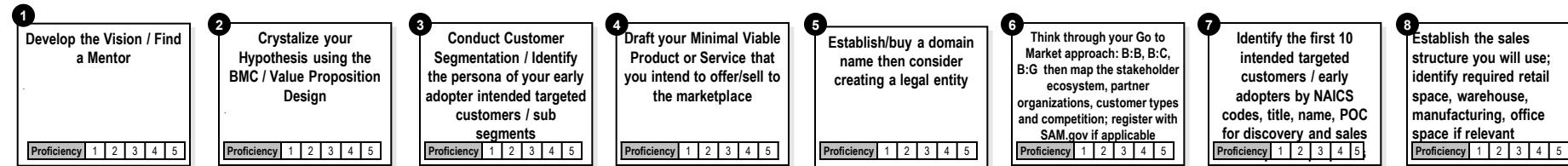
Customer Discovery, Validating the Hypothesis, Early Adopter



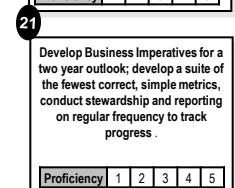
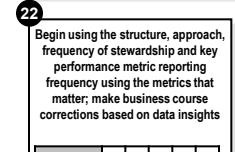
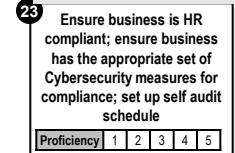
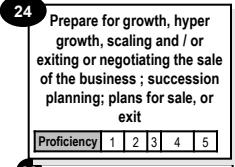
Developing the Business Plan “pitch” Narrative, Financial Projections (Rev. / Cost), Risk, Funding the Business Stages of Marketing Maturity, Business Development, Sales, Operations, Scaling

Small Business Entrepreneurial Map – Original Work by George Johnson, Senior Business Advisor, Mission SBDC – Copyright March 2025

# “Typical” Small Business Entrepreneurial Journey



Vision, Startup, Legal Entity Choices, Value Proposition Design, Customer Segmentation, Eco System Stakeholder Mapping, Competitive Analysis



Strategic Imperatives, Metrics, Cybersecurity

## Self Assessed Proficiency – From Subject Matter Expert to Needing Mentorship

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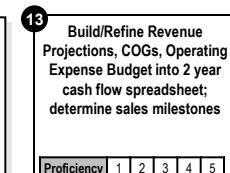
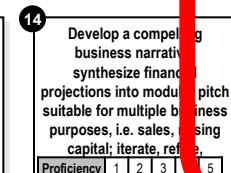
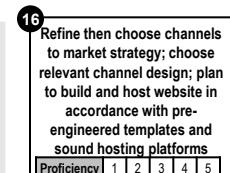
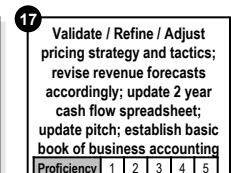
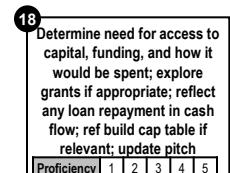
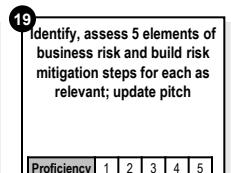
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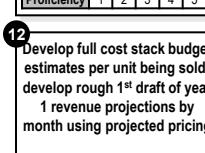
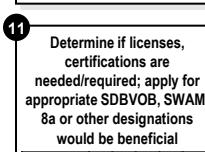
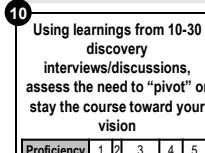
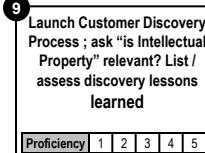
1 = Nonexistent (We do not have these skills at all)



Developing the Business Plan “pitch” Narrative, Financial Projections (Rev. / Cost), Risk, Funding the Business Stages of Marketing Maturity, Business Development, Sales, Operations , Scaling



Customer Discovery, Validating the Hypothesis, Early Adopter



# Step # 8 Points of Emphasis

**Your proposed “Go To Market GTM” strategy should be considered here:**

- B:B?
- B:C?
- D:C”?
- B:G?

**Ask yourself, “who” in your organizational (now or down the road) will do the Sales Development?**



**What is the most appropriate sales structure for your business?**

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# Step # 9 Points of Emphasis

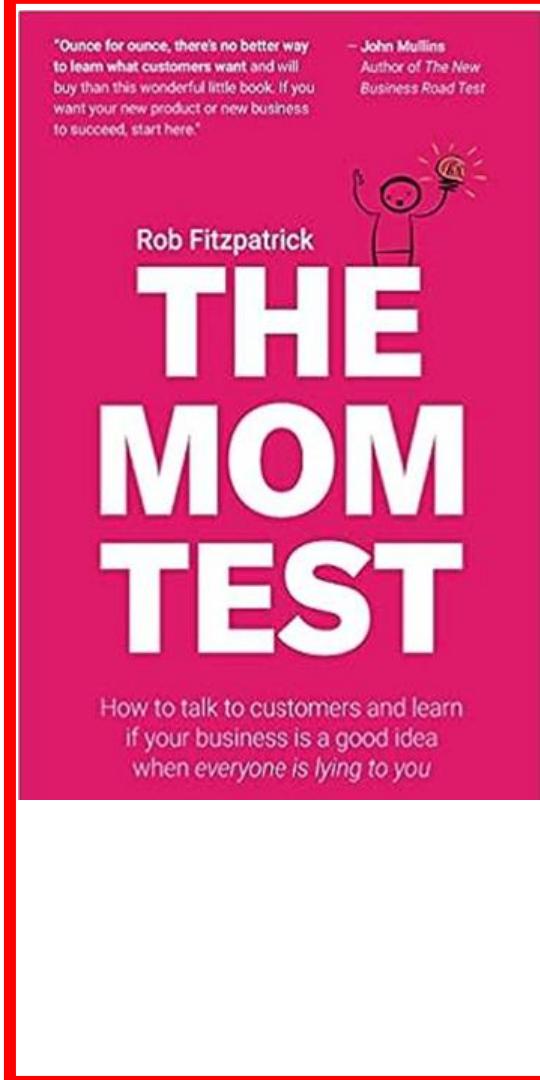
**Is my innovation  
patentable?**

**Should it be?**

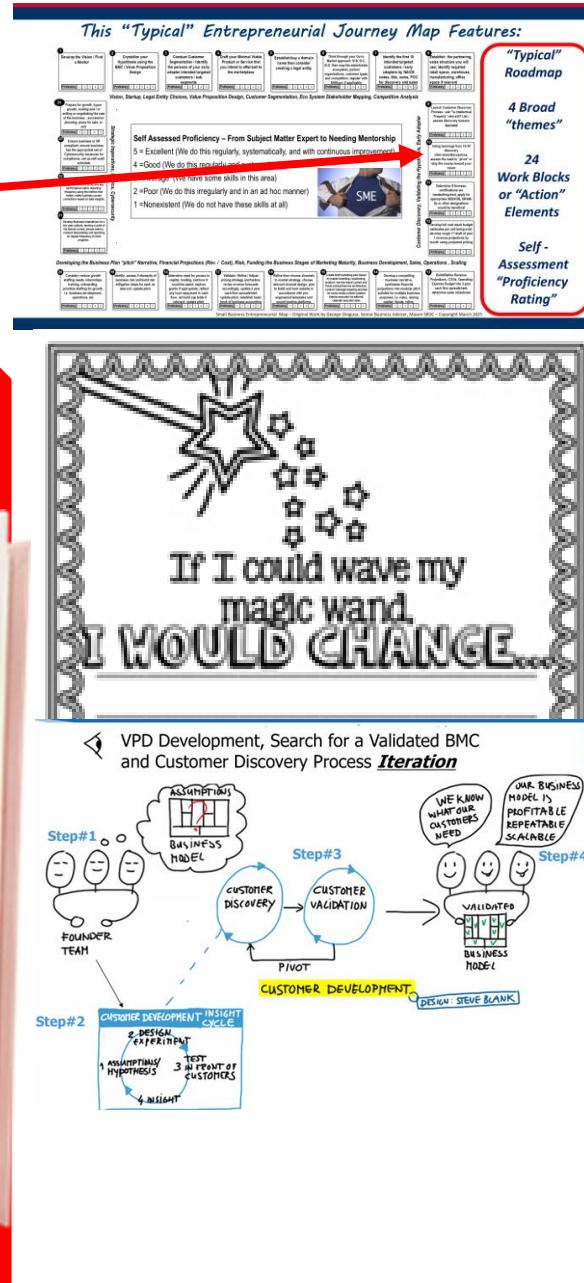
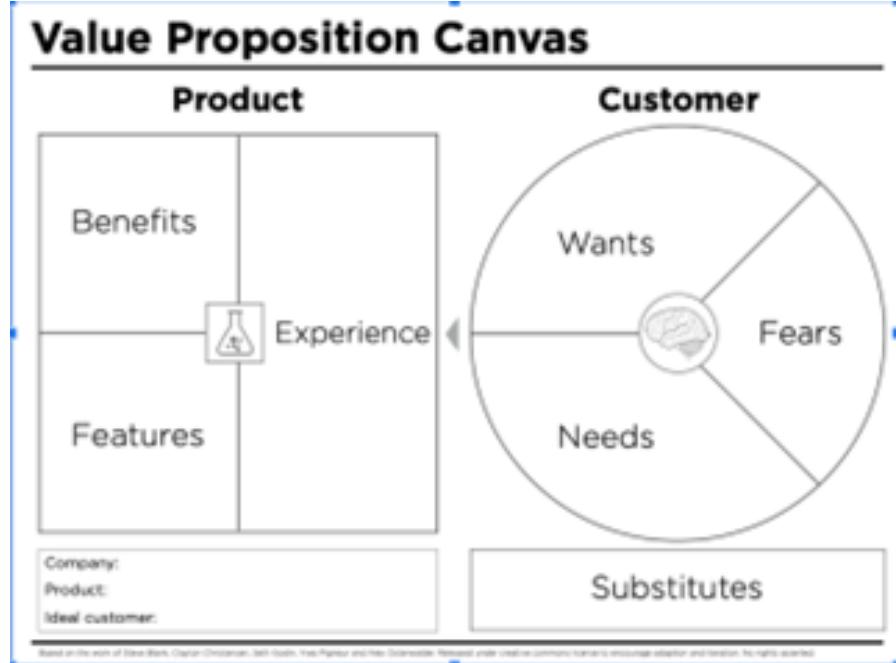
**And if not, how  
do I protect my  
trade secret?**



# Step # 10 Points of Emphasis

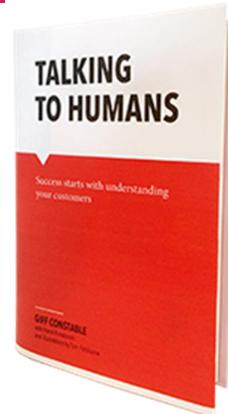
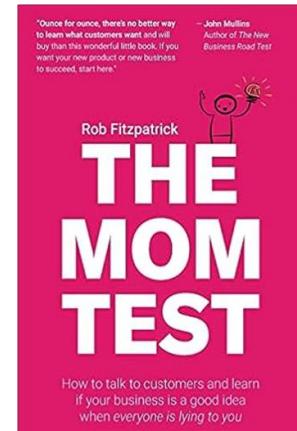
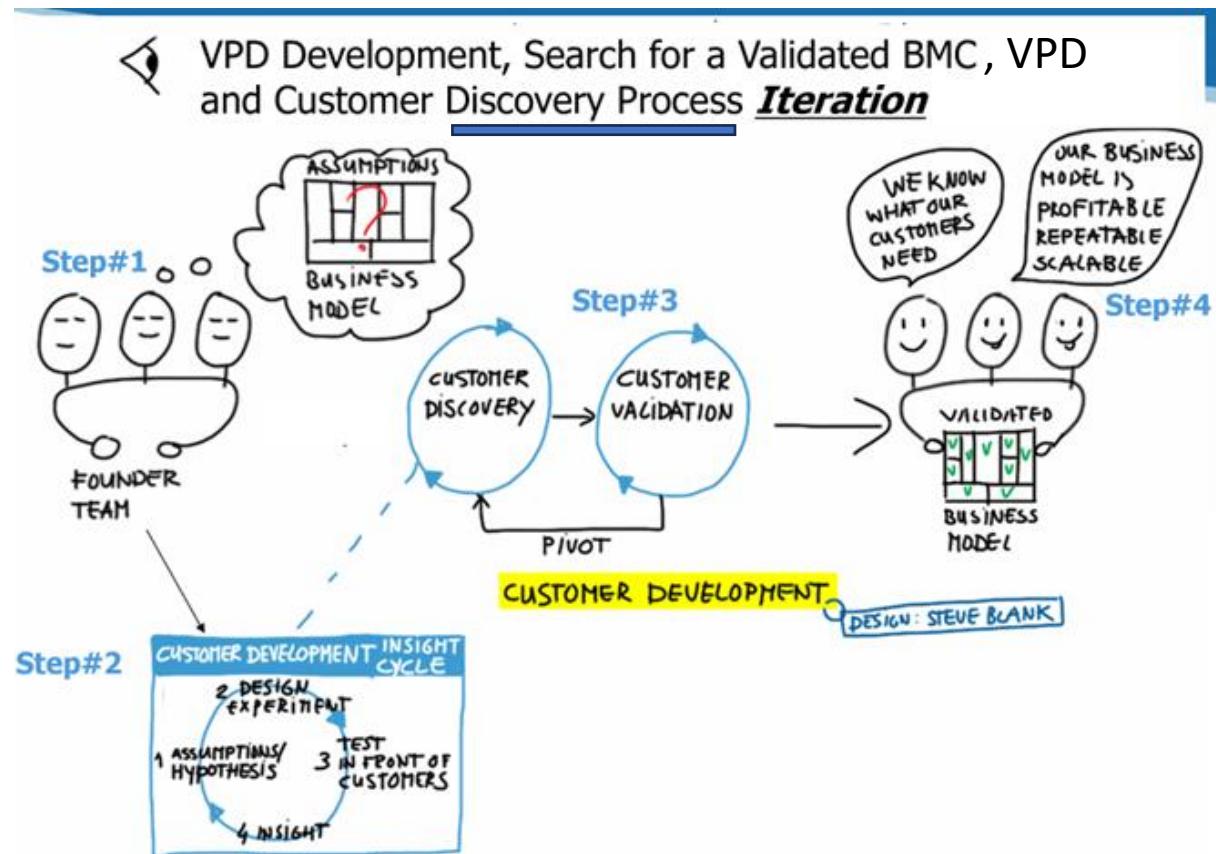


Think you have created value in the marketplace? :  
Test your hypothesis with “Discovery”  
BEFORE you sink big \$\$\$ !



# Step # 10 Points of Emphasis

Do you believe you have created value in the marketplace? :  
Test your hypothesis with “Discovery” BEFORE you sink big \$\$\$ !



## Step # 11 Points of Emphasis



## SBA WOSB Certification Summary Sheet

10306 Eaton PI, Suite 180, Fairfax, Virginia 22030 | [www.masonsbdcc.org](http://www.masonsbdcc.org) | Phone: 703-261-4105

### **Helpful Resources:**

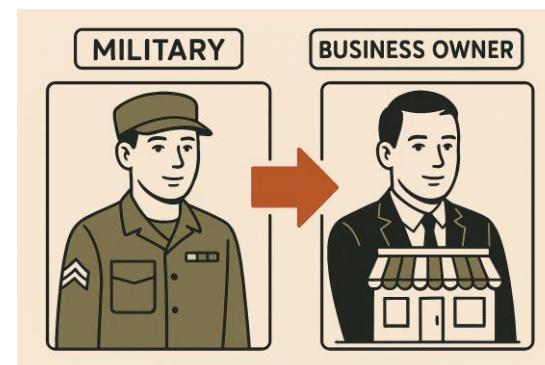
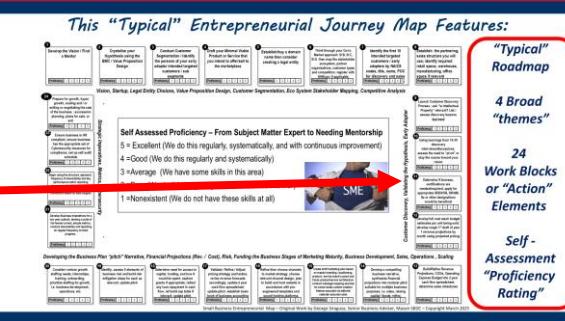
- [U.S. Small Business Administration \(SBA\)](#)
- [WOSB Fact Sheet](#)
- [Certification Options Table](#)
- [Latest FAQs](#)
- [Local Women's Business Center Finder](#)
- [WOSB.Certify Knowledge Base](#)
- [WOSB Quick Start Guide](#)
- [WOSB Website](#)



## SBA Veteran Certification Summary Sheet

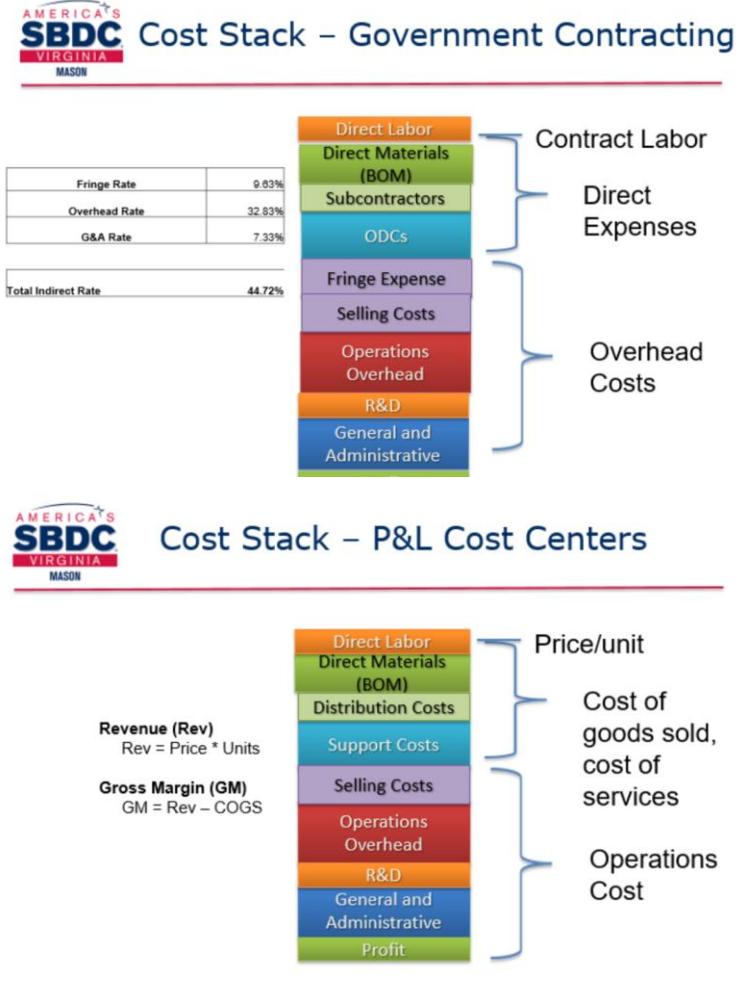
10306 Eaton Pl, Suite 180, Fairfax, Virginia 22030 | [www.masonsbdcc.org](http://www.masonsbdcc.org) | Phone: 703-261-4105

- [VetCert Support](#)
- [VetCert Benefits](#)
- [VetCert Fact Sheet](#)
- [VetCert FAQs](#)
- [Veteran Contracting Assistance Programs](#)
- [Office of Veterans Business Development](#)
- [Surplus Personal Property for Veteran-Owned Small Businesses](#)
- [Service-Disabled Veteran-Owned Small Business Program](#)



# Step # 12 Points of Emphasis

Begin to create a very rough idea of the startup and steady state operational costs buckets for the business you envision



# Step # 12 Points of Emphasis

**Revenue (Rev)**  
Rev = Price X # Units

**Gross Margin (GM)**  
GM = Rev – COGS

## The “Cost Stack”

Use to “test” a price **not** to “set” a price

Use to Calculate the Cost of Customer Acquisition



Ave Price in  
\$USD times # of  
units / of  
products or  
services sold

Operating  
Costs

Cost of  
Goods  
(COGS)



**Your cost stack  
can also help you:**

- **“test”(not set)  
your pricing**
- **determine  
your “Cost of  
Acquiring  
Customers”**

# Step # 13 Points of Emphasis

**Refine and polish your startup / operational costs buckets for the business you envision; identify costs of goods (COGS), utilities, wages, etc.**

**Based on your market discovery, “Ground Truth” the assumptions that will underpin your revenue projections and begin to build your revenue projections for year 1.**

**Ask: “how many services / products will you sell in month 1, 2, 3. etc. and for what price point(s)? ”**



I will sell “X” units of products or services for price points of “Y” \$\$s per unit.

In month 1 it will be “X” units times “Y” price per unit....in month 2 it will be.....in month 3 it will be....

# Consider attending MSBDC "How To" Webinars Associated with Phase 2

## Workshops & Events - Mason SBDC

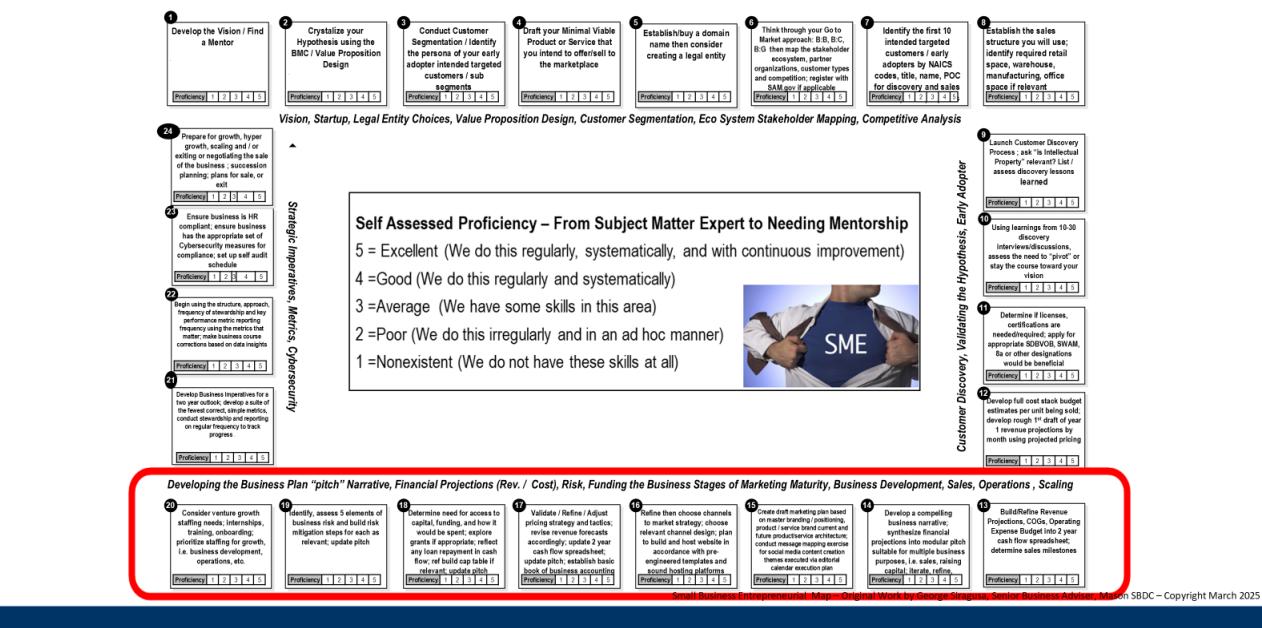


Referencing  
leg 2 of the  
“map”, lets  
pause for  
Questions  
and  
Discussion!

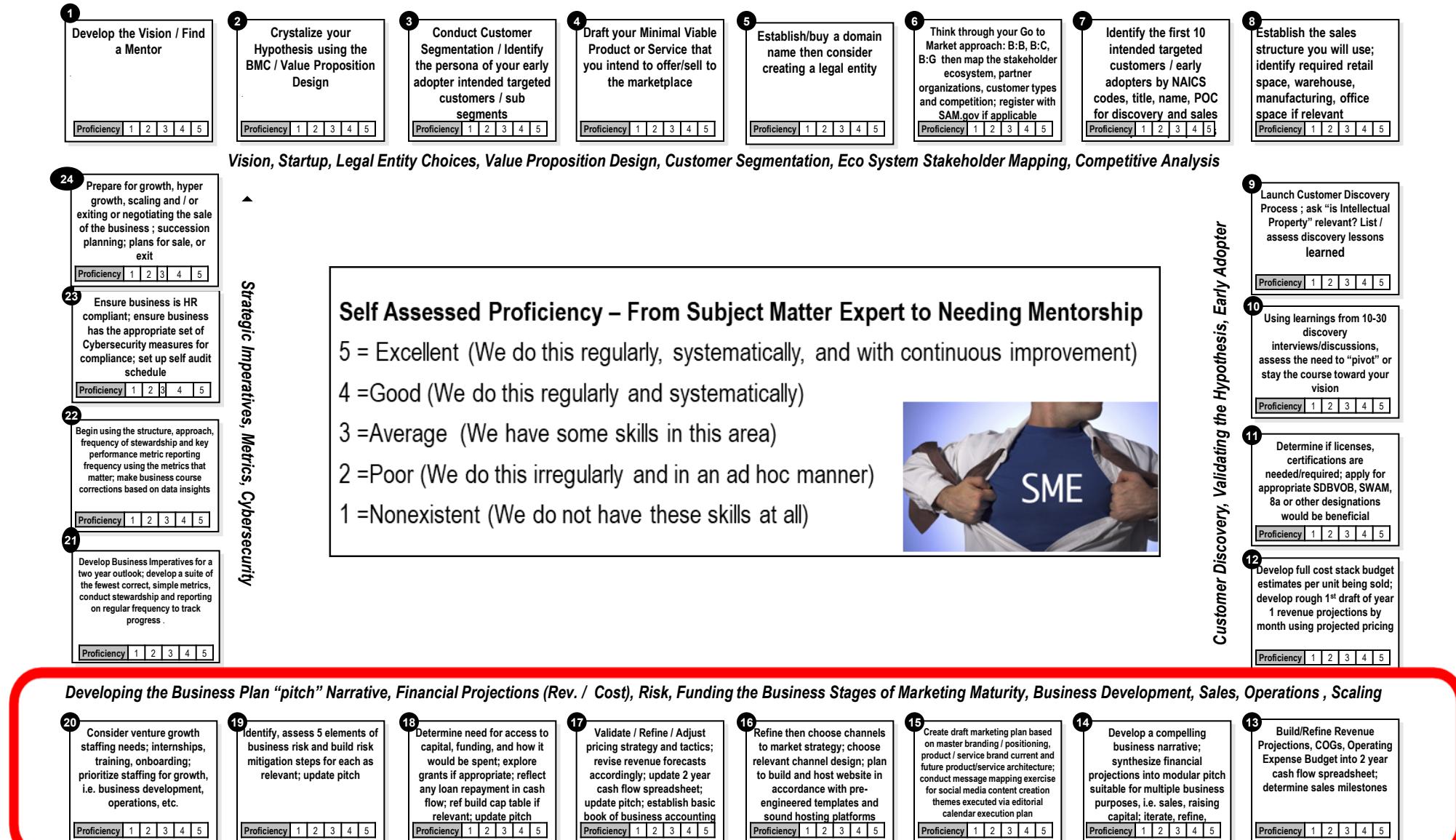


# Leg #3 of the journey

## “Typical” Small Business Entrepreneurial Journey



# “Typical” Small Business Entrepreneurial Journey



## Step # 13 Points of Emphasis

**“Ground truth” assumptions  
that will underpin the  
revenue projections and  
costs**

**Develop your 2-3 year cash  
flow spreadsheet**

**Baseline Revenue Model**

Category, AVERAGES	Coffee Shop	Beer & Wine	Roasted Coffee	Totals
Transactions per Hour	16	8	--	
Customers per Day	200	32	18	
Food Conversion	25%	25%	--	
Daily Revenue	\$849	\$514	\$250	<b>\$1,613</b>
Monthly Revenue	\$25,465	\$15,422	\$7,507	<b>\$48,394</b>
Yearly Revenue	\$305,579	\$185,064	\$90,082	<b>\$580,725</b>

Category	Year 1	As Percent	Year 2	As Percent	Year 3	As Percent
Coffee Shop Revenue	\$256,410	52%	\$367,302	54%	\$448,921	55%
Beer & Wine Revenue	\$124,339	25%	\$171,629	25%	\$180,547	22%
Coffee Bags & Wholesale	\$64,207	13%	\$98,947	14%	\$132,527	16%
Farmers Market	\$43,464	8.9%	\$47,996	7.0%	\$52,528	6.4%
less returns	(\$15,647)	-3.2%	(\$22,148)	-3.2%	(\$25,869)	-3.2%
<b>TOTAL Revenues</b>	<b>\$488,420</b>		<b>\$685,874</b>		<b>\$814,523</b>	
<i>Costs Of Goods Sold</i>	\$167,987	34%	\$234,189	34%	\$277,165	34%
<i>Payroll Expenses</i>	\$191,456	39%	\$223,034	33%	\$296,741	36%
<i>General &amp; Administrative</i>	\$117,140	24%	\$122,446	18%	\$125,859	15%
<b>TOTAL Expenses</b>	<b>\$476,583</b>	98%	<b>\$579,669</b>	85%	<b>\$699,764</b>	86%
<b>GROSS PROFITS</b>	<b>\$11,838</b>	2%	<b>\$106,205</b>	15%	<b>\$114,758</b>	14%



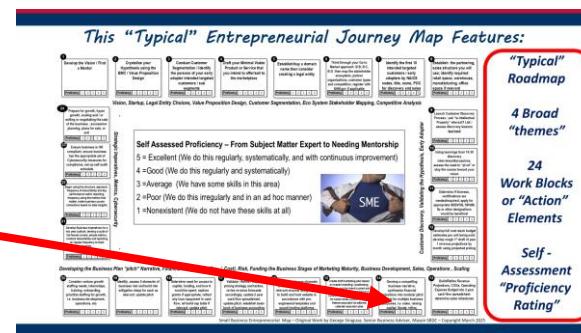
# Step # 14 Points of Emphasis

## Create your business plan modular briefing narrative

### Suggested DRAFT Storyboard Outline Flow for your Investor Pitch Deck

- useful *starting point* PowerPoint template to create a compelling “story” that can be made relevant for a variety of targeted audiences (i.e. Investor, Bank, Customer, Client, etc.)
  - modify pages depending on presentation objectives and type of audience
  - create a draft for review, iteration and edit
    - create the template by making each bolded element its own page title*
    - build 3 bulleted phrases per PowerPoint page to reflect key points to emphasize*

<ul style="list-style-type: none"><li><input type="checkbox"/> <b>Intro: What do you do ? + your "WHY"</b></li><li><input type="checkbox"/> <b>Investment Need Summary</b></li><li><input type="checkbox"/> <b>Scene Set, Context, Statistics, Facts</b></li><li><input type="checkbox"/> <b>The Problem</b></li><li><input type="checkbox"/> <b>The Solution and Value Proposition</b></li><li><input type="checkbox"/> <b>Competition</b></li><li><input type="checkbox"/> <b>Strategic Competitive Advantage</b></li><li><input type="checkbox"/> <b>The Team</b></li><li><input type="checkbox"/> <b>Your Business model</b></li></ul>	<ul style="list-style-type: none"><li><input type="checkbox"/> <b>Route / Path to Market</b></li><li><input type="checkbox"/> <b>Financials: Startup &amp; Operating Cost/Budget Estimates; Revenue Projection Summary</b></li><li><input type="checkbox"/> <b>Traction/Early Adopter Sales/Proof of Concept</b></li><li><input type="checkbox"/> <b>Major Milestone Timeline / Phases</b></li><li><input type="checkbox"/> <b>Strategic Marketing Plan Elements</b></li><li><input type="checkbox"/> <b>Investment Request; Detailed Use of Funds</b></li><li><input type="checkbox"/> <b>Risk Mitigation</b></li><li><input type="checkbox"/> <b>Call to action / Points of Contact</b></li></ul>
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# Step # 14 Points of Emphasis

Integrate your P&L as a summary into the narrative

Category	Year 1	As Percent	Year 2	As Percent	Year 3	As Percent
Coffee Shop Revenue	\$256,410	52%	\$367,302	54%	\$448,921	55%
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## Step # 15 Points of Emphasis

## Marketing Plan Objectives



## BUILDING YOUR BRAND.



## CREATING COMMUNITY.



## GENERATING SALES.



## BUILDING YOUR REPUTATION.



## GENERATING LEADS.

## Your Strategic Marketing Plan should address its purpose



## Step # 15 Points of Emphasis

# Sales vs. marketing

In its simplest form, the marketing team creates content about a company's products and services to generate brand awareness and fill the prospect pipeline.

From there, the sales team is responsible for converting customers in the pipeline to generate revenue.



# Step # 15 Points of Emphasis



3 "Pillars"

Supporting themes

## Weathervane Coffee Message Mapping Example

**Rational element**

*"We are a family owned, local specialty coffee roaster designed for coffee lovers"*

**Rational element**

*"We curate all our beans at the source, then artisanally roast them for freshness, on premises, to perfection"*

**Emotional element**

*"We create a fresh, exquisite, enjoyable, subtly complex and memorable cup of coffee and the experience to with it!"*

Grew up in South America on coffee plantation

Growing up in South American coffee bean plantation we know what growing conditions make good beans

We have a beautiful barista in the ground floor of our luxury apartment

Developed a love for both great coffee and the entrepreneurial spirit for local business success

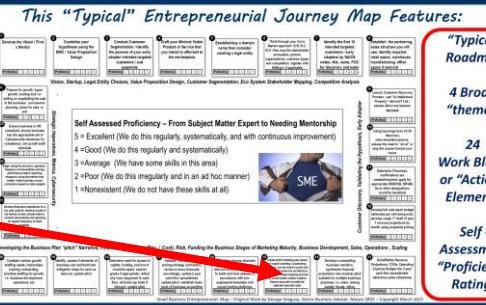
We have our own roasting equipment on premises and use carefully quality controlled methods to roast and brew our coffee selections.

We sell small bites for breakfast and for lunch in a pleasant and comfortable atmosphere

We started our business with a popup tent near our 1<sup>st</sup> location in Reston

We only procure the finest coffee beans from our trusted, eco friendly and fair trade suppliers

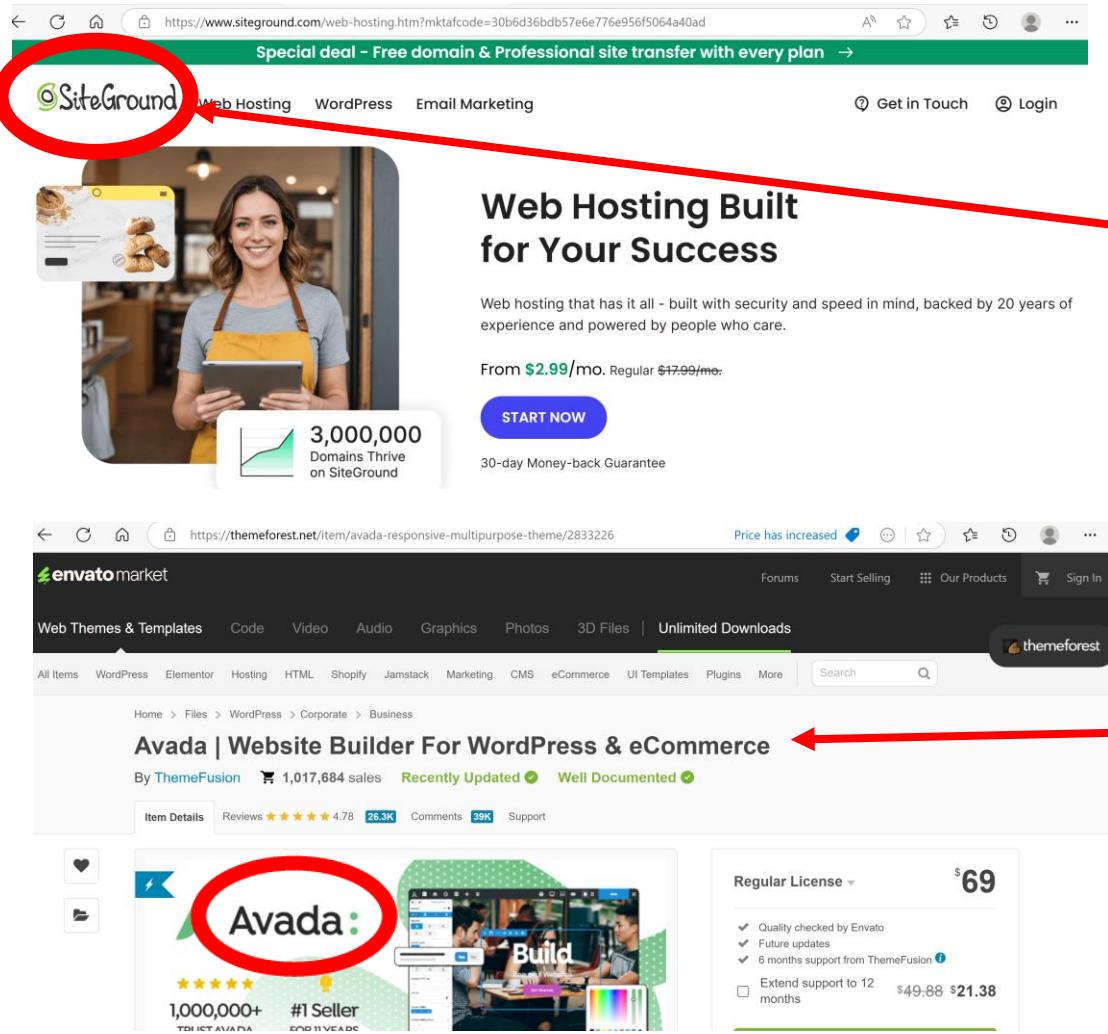
We have repeat customers who enjoy the coffee, our pleasant staff and each other



Developed from the thinking coming from your Value Proposition Design and Discovery, build your Message Map.

This is your strategic framework around which you can plan, develop, schedule, execute and tactically launch your digital marketing content campaign.

# Step # 15 Points of Emphasis



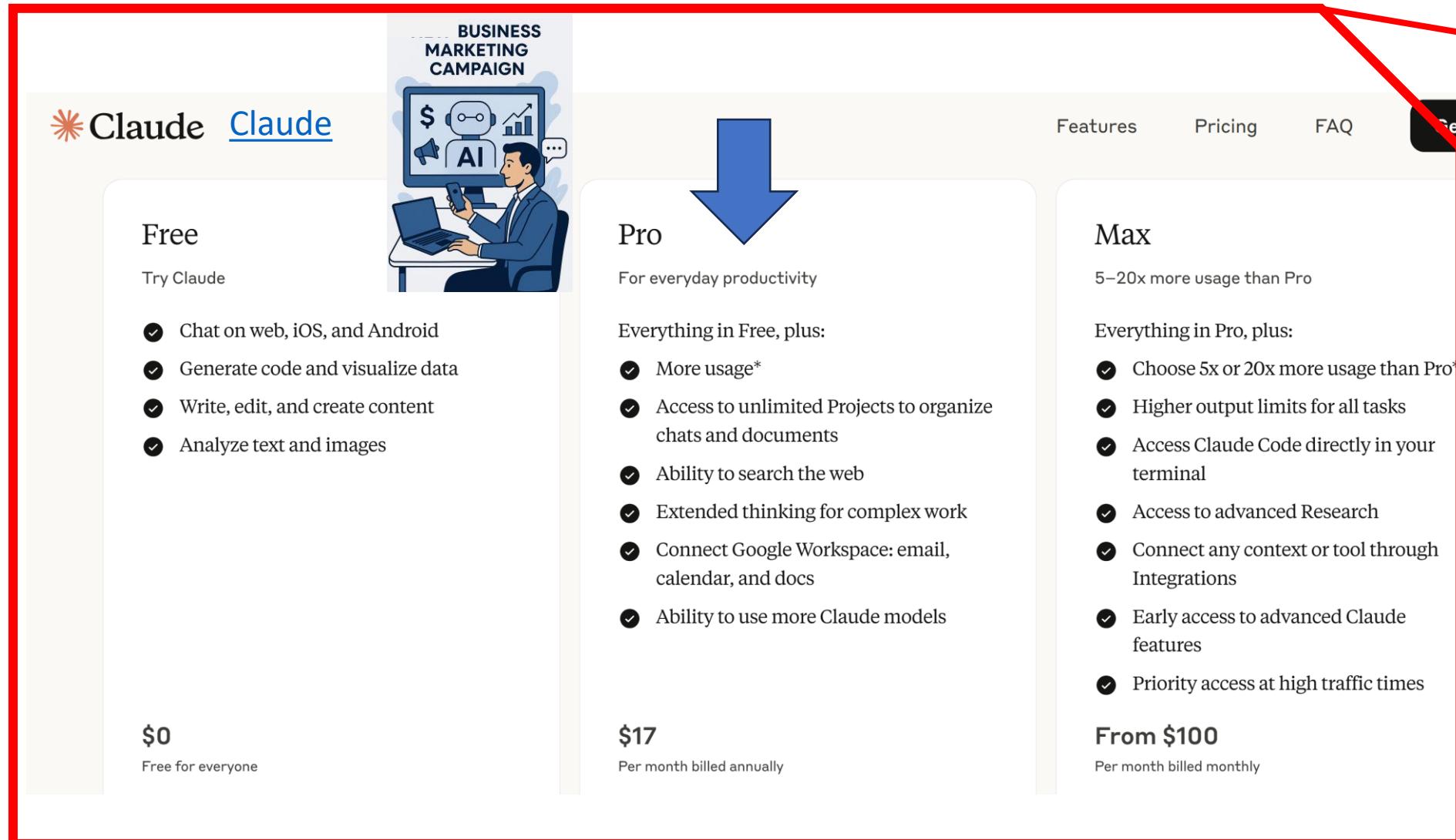
Chose a **Professionally Managed** website hosting service.

Build your website in WordPress using “pre-engineered” templates that are recognized by organic search to optimize your SEO.



[SEO Tools, Software and Articles](#) | [SEO Site Checkup](#)

# Step # 15 Points of Emphasis



**Claude** [Claude](#)

**Free**  
Try Claude

- ✓ Chat on web, iOS, and Android
- ✓ Generate code and visualize data
- ✓ Write, edit, and create content
- ✓ Analyze text and images

**\$0**  
Free for everyone

**Pro**  
For everyday productivity

Everything in Free, plus:

- ✓ More usage\*
- ✓ Access to unlimited Projects to organize chats and documents
- ✓ Ability to search the web
- ✓ Extended thinking for complex work
- ✓ Connect Google Workspace: email, calendar, and docs
- ✓ Ability to use more Claude models

**\$17**  
Per month billed annually

**Features** **Pricing** **FAQ** **Set started**

**Max**  
5–20x more usage than Pro

Everything in Pro, plus:

- ✓ Choose 5x or 20x more usage than Pro\*
- ✓ Higher output limits for all tasks
- ✓ Access Claude Code directly in your terminal
- ✓ Access to advanced Research
- ✓ Connect any context or tool through Integrations
- ✓ Early access to advanced Claude features
- ✓ Priority access at high traffic times

**From \$100**  
Per month billed monthly



**Consider using an “Ai” platform like CLAUDE (the paid version) to aid in finding relevant key words and helping to create your digital Marketing campaign.**

## Step # 15 Points of Emphasis

- 3 “Pillars are Strategic
- Supporting Element themes become your content
- Content Calendar aids in determining, directing, distributing
  - identifies channels
  - Facilitates campaign timing execution



## Strategic Marketing Execution Plan Summary for 2H2022

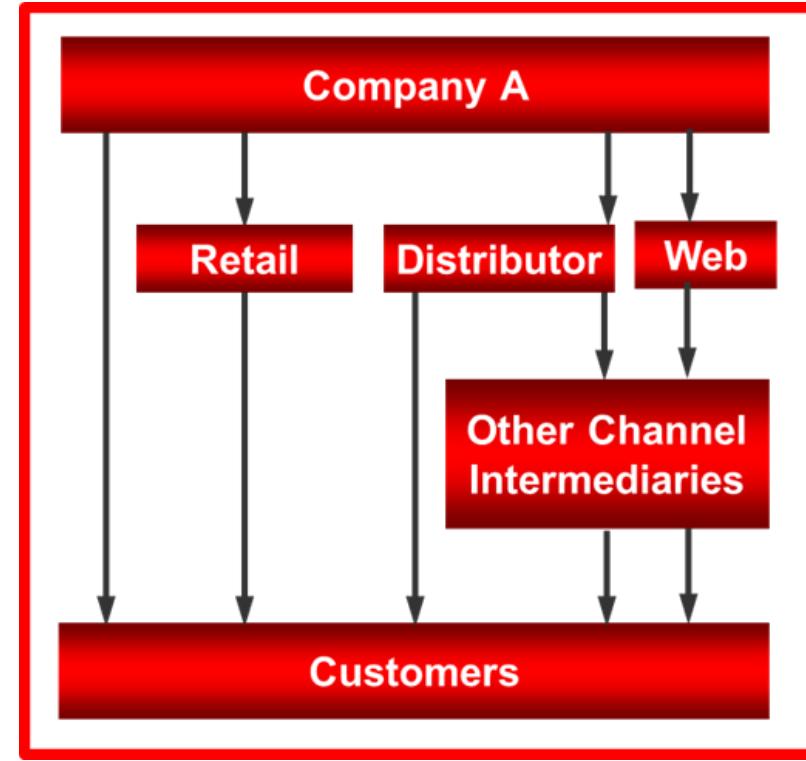
Tactics / Category	Jul	Aug	Sep	Oct	Nov	Dec
Press Releases: <ul style="list-style-type: none"> <li>• soft launch</li> <li>• hard launch</li> <li>• major events</li> <li>• website</li> <li>• testimonials</li> <li>• new markets</li> <li>• byline articles</li> <li>• other</li> </ul>				Post to FB		
Major Events <ul style="list-style-type: none"> <li>• Trade shows</li> <li>• Conferences</li> <li>• Speaking Ops</li> <li>• Networking</li> </ul>						
Digital Footprint <ul style="list-style-type: none"> <li>• Website               <ul style="list-style-type: none"> <li>- SEO</li> <li>- Analytics</li> </ul> </li> <li>• Facebook               <ul style="list-style-type: none"> <li>- Ads</li> </ul> </li> <li>• Instagram               <ul style="list-style-type: none"> <li>- Posts</li> </ul> </li> <li>• Blogs</li> <li>• Other</li> </ul>		Video Blog on website				
Collateral Materials <ul style="list-style-type: none"> <li>• Posters</li> <li>• Banners</li> </ul>						
Sales Development <ul style="list-style-type: none"> <li>• Lead Generation</li> <li>• Email push</li> <li>• other</li> </ul>			1 <sup>st</sup> Email Drip		2 <sup>nd</sup> Email Drip	

Social Media Marketing and Management Dashboard - Hootsuite



## Step # 16 Points of Emphasis

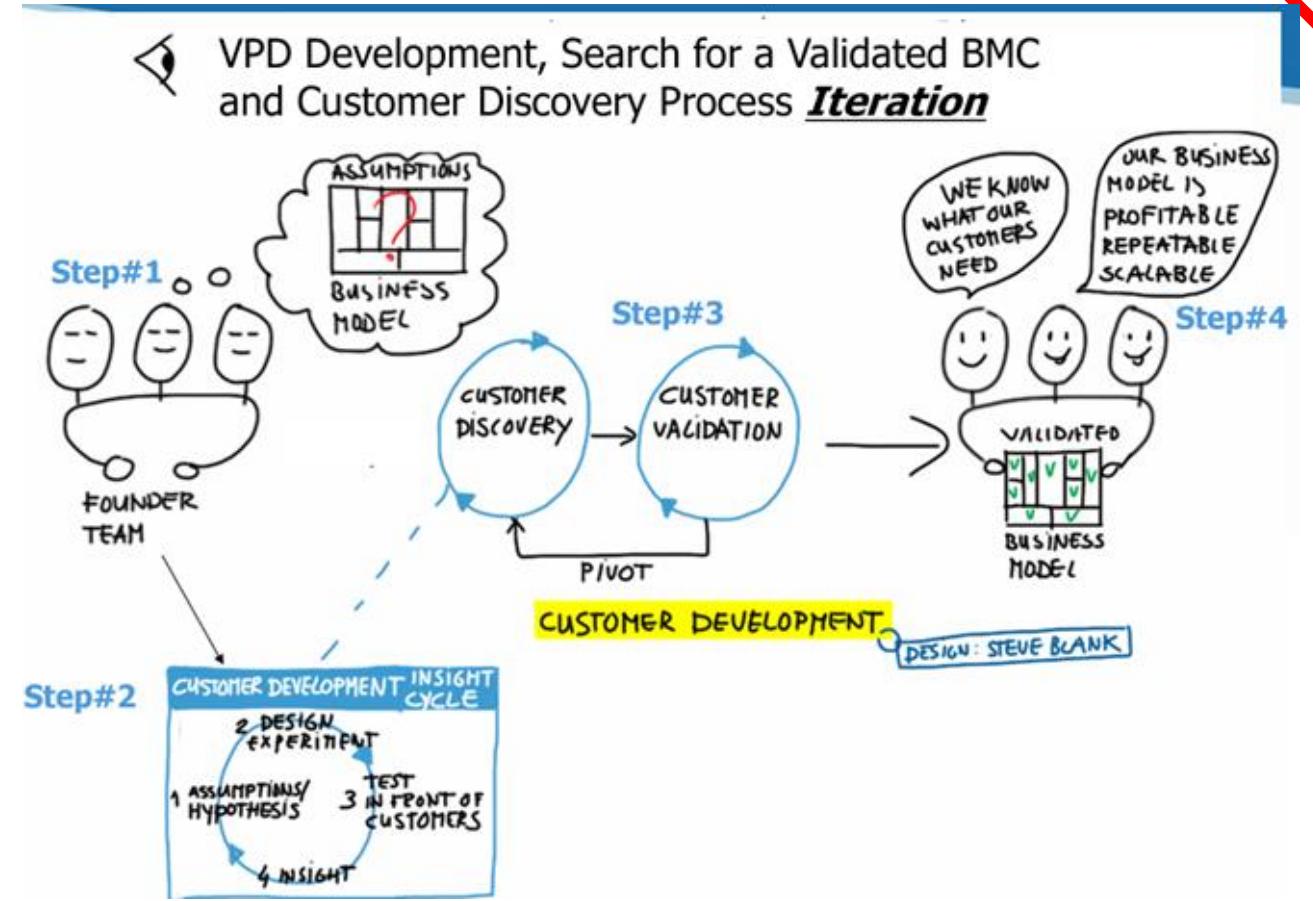
Referencing the Targeted Intended Customer / segment from the VPD, optimize/choose the most relevant Channel / pathway To Market



# Step # 17 Points of Emphasis

From everything you learned, refine, polish, iterate with a mentor your:

- Pitch
- Narrative,
- Financials



# Step # 18 Points of Emphasis

Identify,  
Quantify your  
Capital need  
considerations and  
the 5 “Cs”

- ✓ **Character**
- ✓ **Capacity**
- ✓ **Capital**
- ✓ **Collateral**
- ✓ **Conditions**

- Funding sources & financing programs
- Misconceptions of small business financing
- Bank financing basics
- Preparing for financing
- Strategies for your bank presentation
- And much more!

How and for what  
would you spend  
the capital?



# Step # 18 Points of Emphasis



How would you spend that capital.

Prepare these docs:

- 2 Years - Business & Personal Tax Returns
- Detailed Financial Statements
- 2 Yr Cash Flow Forecast (Excel version)
- Personal Financial Statement
- Business Brochure/Capability Statement
- Operating Agreement
- Other as requested

# Step # 19 Points of Emphasis

**Identity the relevant risk for your business and the mitigation strategies and tactics for each**

**Elements of risk to consider:**

- **Business risk**
- **Brand Reputational risk**
- **Financial risk**
- **Legal Risk**
- **Cyber Risk**
- **Other/Uncertainty/Ambiguities**

