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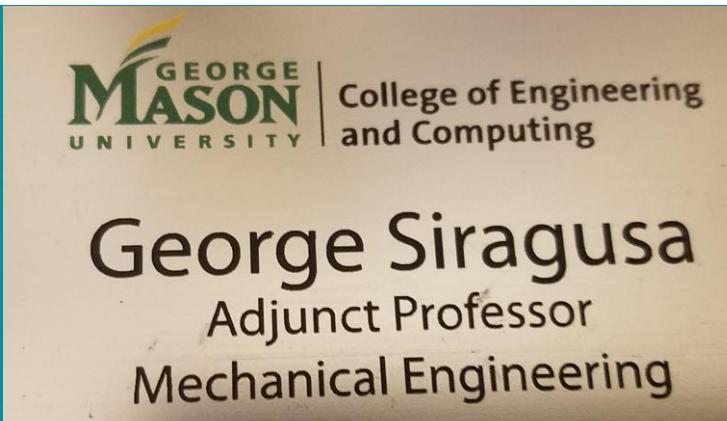


Presents:
Best Practices
in
Preparing your Business Plan Briefing

Your Presenter for today's discussion:



Mason SBDC
George Siragusa
Senior Business Adviser



George Siragusa
Adjunct Professor
Mechanical Engineering

Hello!

Please call me...

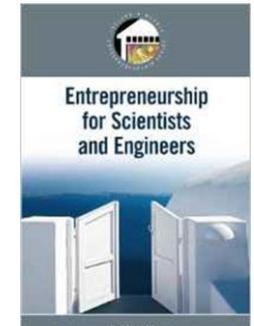
“Coach S.”



Senior Business Adviser SBDC
Growth Wheel Int'l Cert. Biz Adviser
Adjunct Professor @ GMU's
School of Engineering
GMU Mentor in Residence

Mentor @ 3 NoVA Tech Accelerators
Entrepreneur, Investor
Co-Founder Marketing Strategy Firm

Retired U.S. Navy Captain
BS Engineering U. S. Naval Academy
Masters CMU
Former Executive, ExxonMobil
Kellogg, Thunderbird Schools
Lean Process GBelt
Published



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PRINCE WILLIAM
ECONOMIC DEVELOPMENT



Hello again to:

Pre-Venture & Startup Companies!

Growth and Venture Companies !

Mature Businesses!

Welcome!



Please call me...

“Coach S.”

<https://www.linkedin.com/in/georgesiragusa/>



Best Practices
in Preparing your
Business Plan Pitch!"



Sponsored by:

*Presented by: George Siragusa
Sr. Business Advisor, Mason SBDC*



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FYI: Small Business Development Centers

- over 1000 Centers Nation-Wide
- 27 Virginia SBDC Centers
- Guidance, Coaching, Resources, Educationn, Access to Capital and more!

No Cost 1-on-1 Business
Counseling !



George Mason
SBDC
Home - Mason SBDC

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U.S. Small Business
Administration

Find Your SBDC - America's SBDC (americassbdc.org)

Thank
you!



HELLO
my name is

“Coach S.”

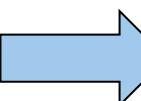
George Siragusa
Senior
Business
Adviser

<https://www.linkedin.com/in/georgesiragusa/>

Seeking our **NO-COST** Business
Assistance?

Mason SBDC
10306 Eaton Place
Suite 180
Fairfax, VA 22030
(703) 261-4105



Our Website: 
www.masonsbd.org

- Resources: [https://www.virginiabd.org/](http://www.virginiabd.org/)
- Contacts: help@masonsbd.org or (703) 261-4105
- 1:1 Counseling: <https://clients.virginiabd.org/reg.aspx?mode=counsel¢er=46110&subloc>
- Workshops: <https://masonsbd.org/workshops/>



Mason SBDC "How To" Webinars

<https://masonsbdc.org/workshops/>

- *Anatomy of a Typical Small Business Entrepreneurial Journey (NEW!) *
- *Legal & Admin Steps to Starting a Business*
- *Value Proposition Design*
- *Small Business Financing*
- ***Preparing your Business Briefing / Narrative / Pitch***
- *Marketing 101*
- *Government Contracting 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*

[Find events | U.S. Small Business Administration \(sba.gov\)](#)

In Summary...Mason SBDC can offer:

- Perspectives / Coaching / Advising
- Resources
- Education
- Access to Capital
- Mentorship
- Guidance along your Journey!





During today's webinar you will.....



- ...become ***aware of "5 scenarios*** in the life of almost any business **when a business plan briefing may be needed and very useful**



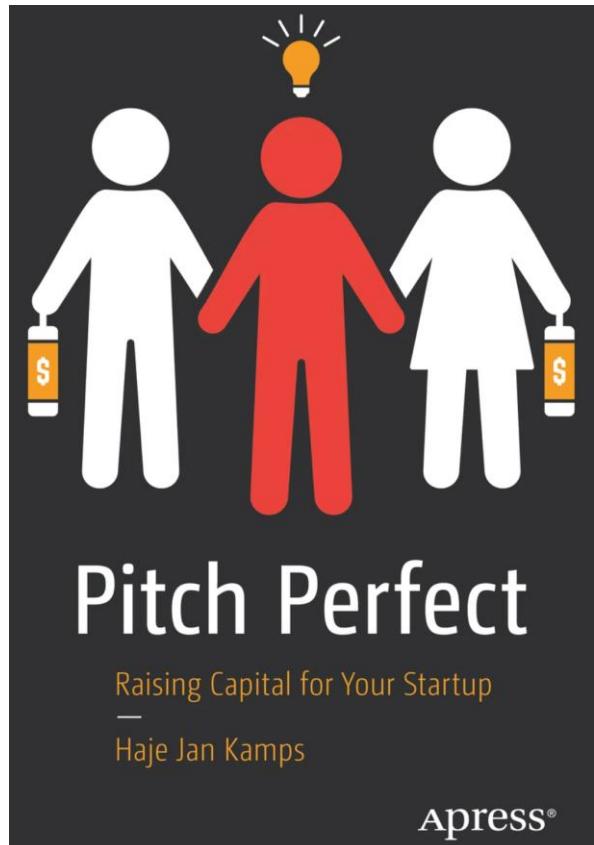
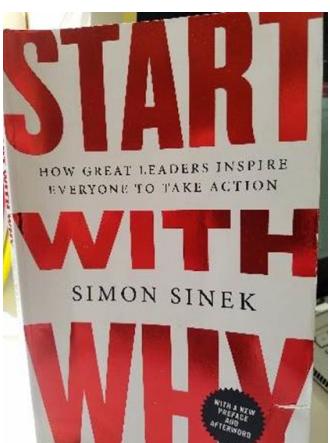
- ...follow a ***5 step checklist*** to ensure your business is built on solid **Lean Foundational Principles**



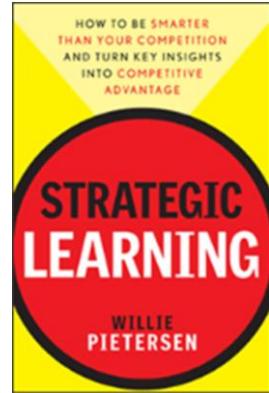
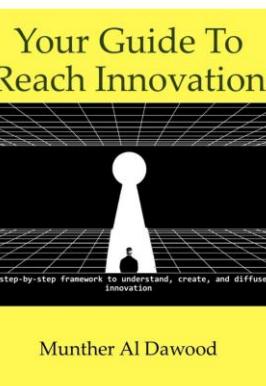
- ...obtain an ***actionable, easy to use, step by step outline*** that forms the **basis of a "Story Board"** to help you create your compelling narrative!



- ...receive an ***actual business briefing file template / example you can follow*** that came from a local business, complete with speaker notes and section-by-section explanations

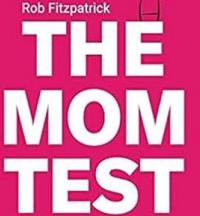


Pitch Related References



"Once for once, there's no better way to learn what customers want and will buy than this small little book. If you want your new product or new business to succeed, start here."

— John Mullins
Author of *The New Business Road Test*



[EC Pitch Deck Teardowns | TechCrunch](#)

[Startups, here's everything you need to know to raise VC funding | TechCrunch](#)

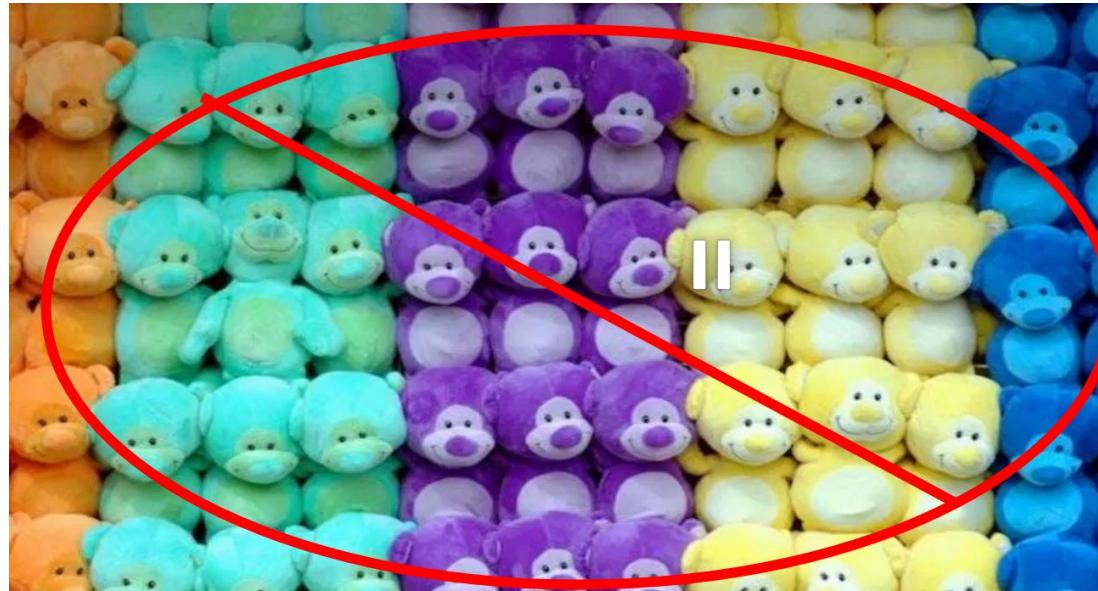
As a reminder...
Registered Participants received
3 documents in their email:

1. Today's Video and Presentation Package
2. Suggested Business Plan Pitch Outline
3. Actual Client Pitch/Business Briefing

Your Business Briefing
is the *Compelling Narrative*
that *Communicates the*
Problem you are Solving
and therefore the
Value you are Creating
in the Marketplace...
...which then becomes
your *de facto business plan*

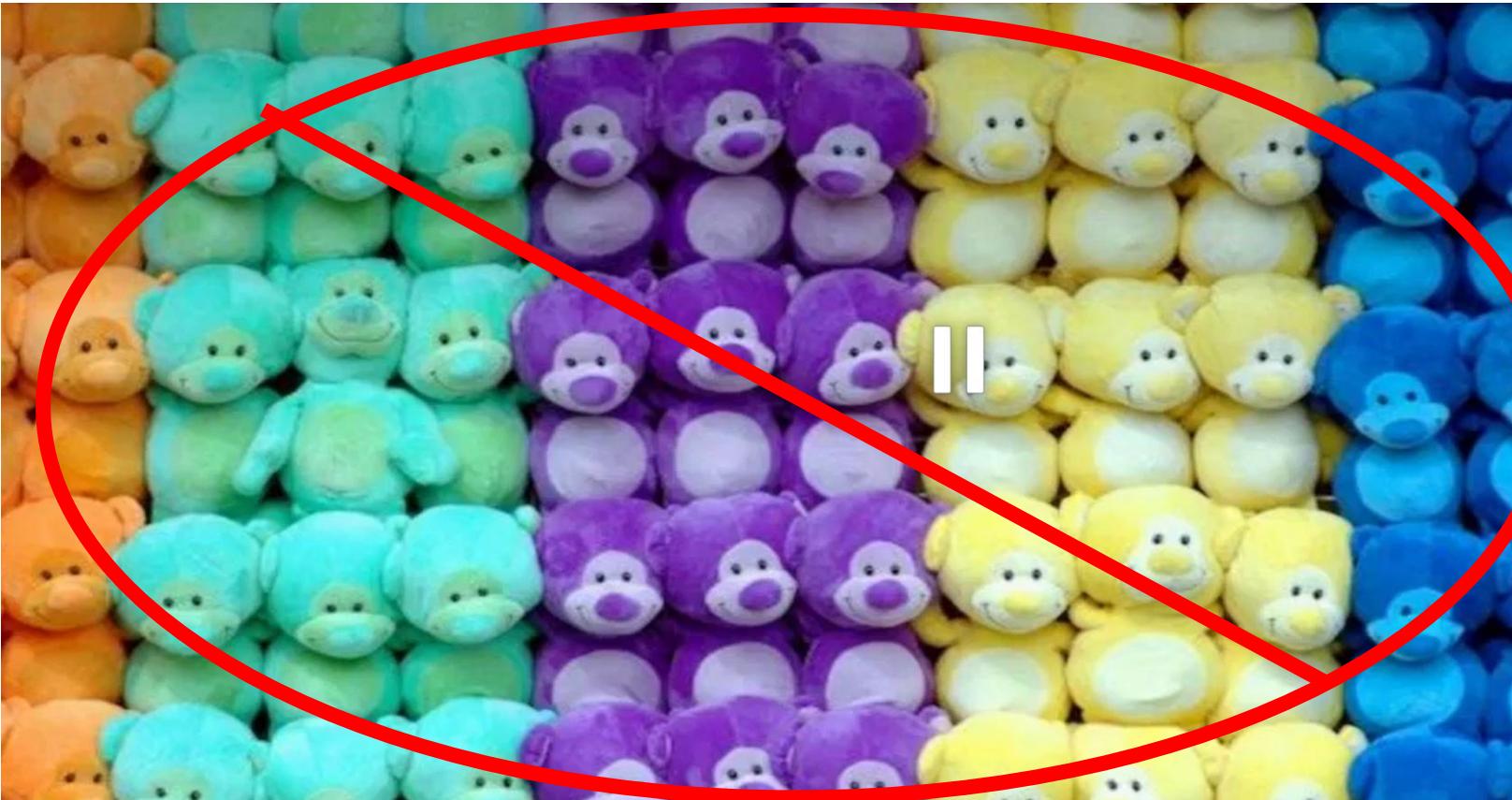


Real World Business Coaching Perspective



Building your Business Narrative
is not a
“squishy, academic” exercise!

There is NOTHING “squishy” about Preparing your Business Plan Briefing

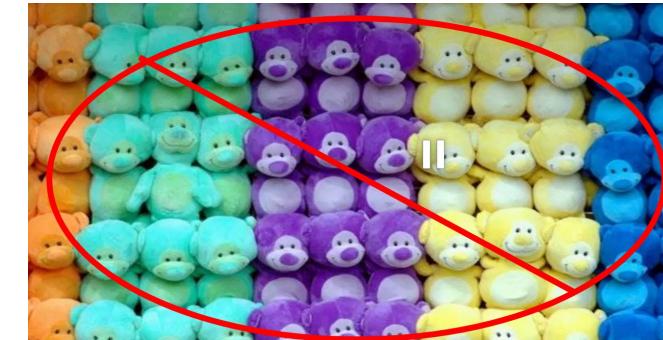


***Please be prepared to dedicate time and focus to
developing your business briefing and its compelling narrative***

Real World Business Coaching Perspective

- This is not a “squishy” “academic” exercise

The Mason SBDC is here to help with all of this!



- Pitch narrative ***reflects the clarity of your value proposition***
- Perfecting your “pitch” is critical to funding/sales success
- Founders / CEOs are coached to create/deliver a compelling narrative that speaks to their unique solutions/benefits/market fit

...AND...

- It's a later step along the path of your entrepreneurial journey

**Prepare yourself by
dedicating some focused
time to become a Subject
Matter Expert, an *SME*,
*in all things related to your
business ecosystem!***



Introducing the “typical” Entrepreneurial Journey Framework!!!



4 Broad
“themes”

24
Work Blocks
or “Action”
Elements

Self -
Assessment
“Proficiency
Ratings”
Per block

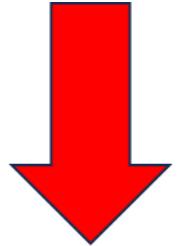


“Journeys”
are not
always the
same

Themes
and work
block
elements
not always
linear

Proficiency
Matters!

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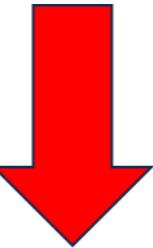


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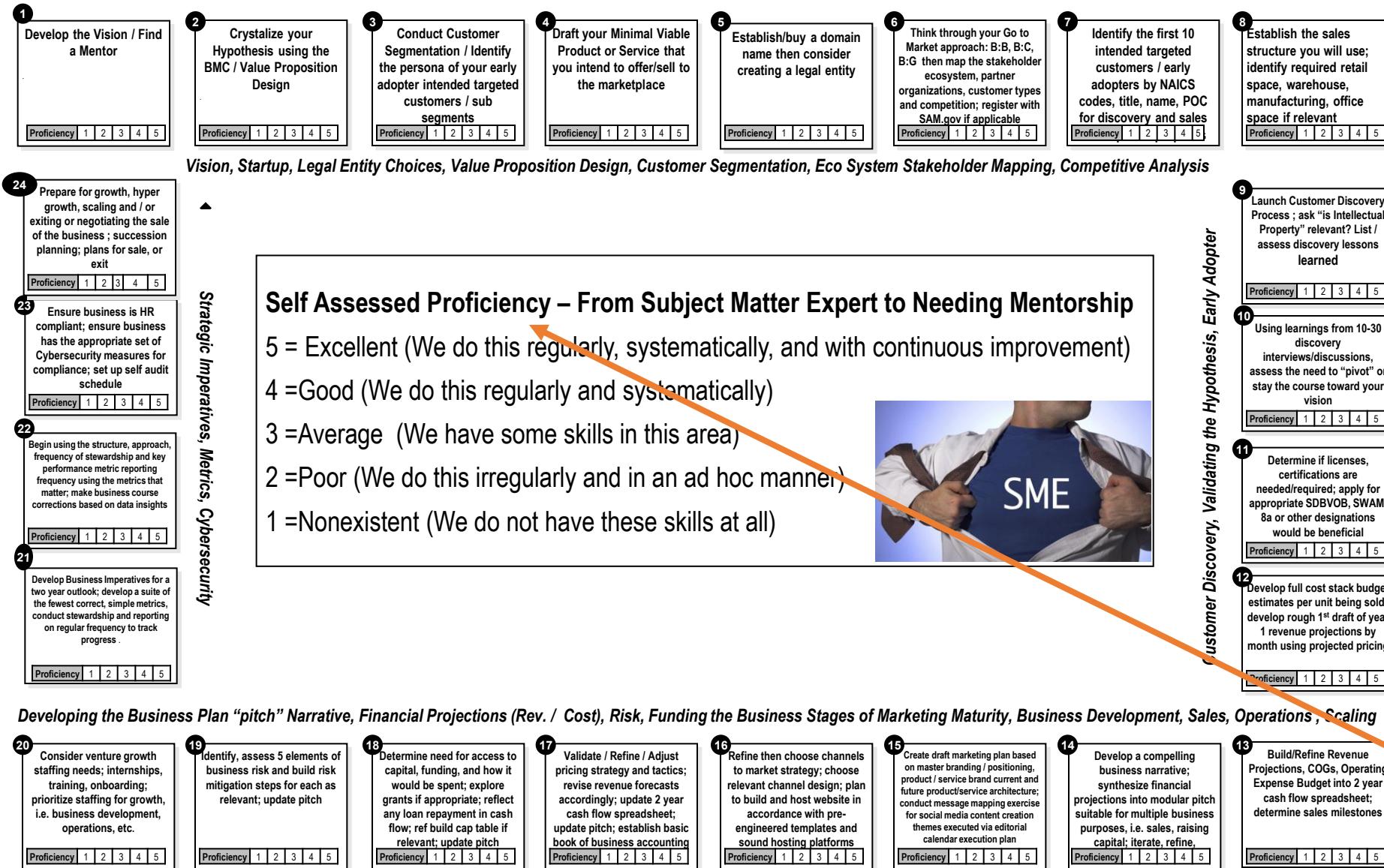
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Introducing the “typical” Entrepreneurial Journey



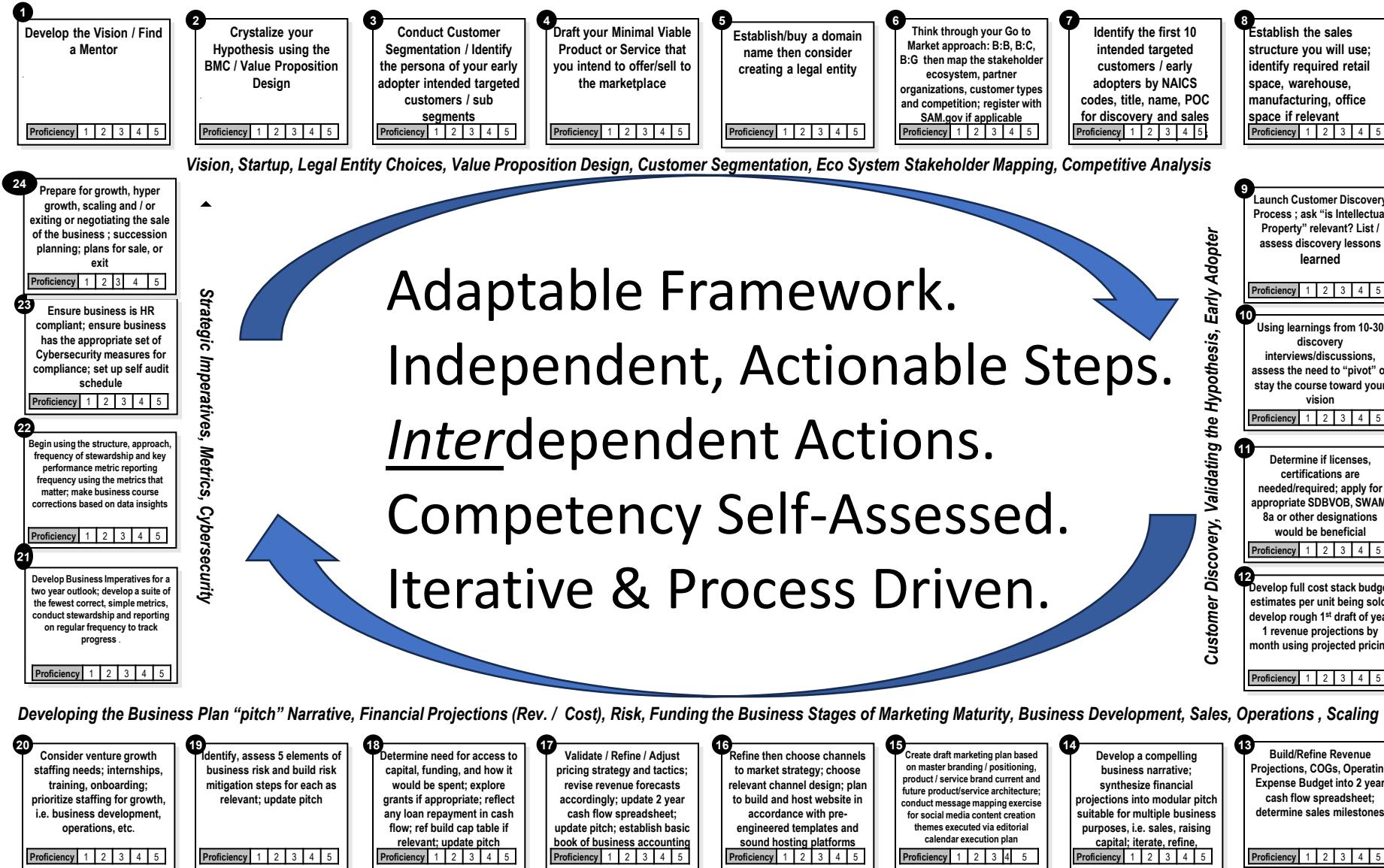
4 Broad “themes”
24 Work Blocks or “Action” Elements
Self - Assessment “Proficiency Rating”



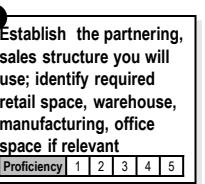
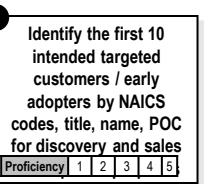
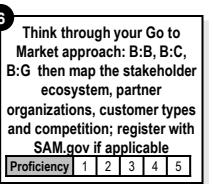
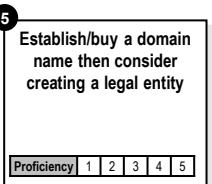
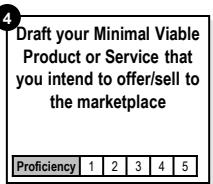
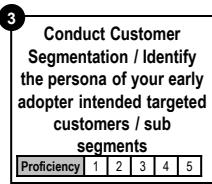
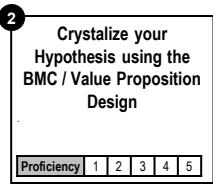
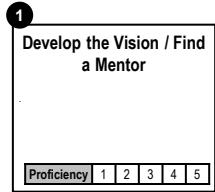
“Journeys” are not always the same
Themes and work block elements not always linear

Proficiency Matters!

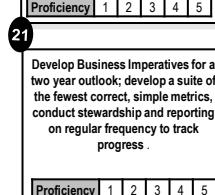
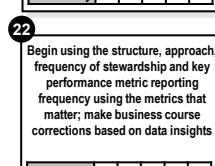
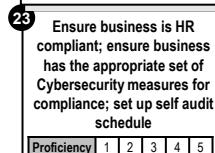
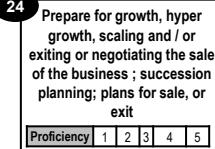
“Typical” Small Business Entrepreneurial Journey



This “Typical” Entrepreneurial Journey Map Features:



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

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)

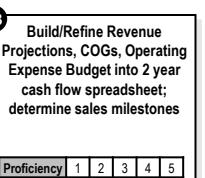
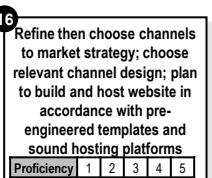
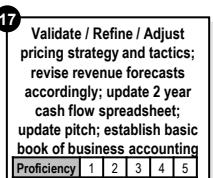
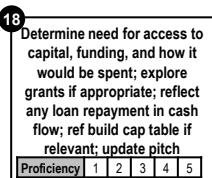
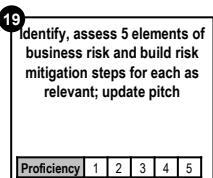
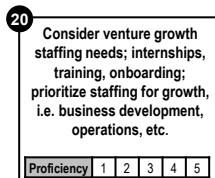
2 = Poor (We do this irregularly and in an ad hoc manner)

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



Your Pitch is ~Step 14 in this journey!!!

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



“Typical” Roadmap

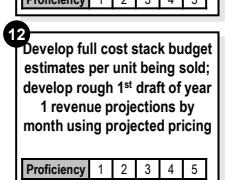
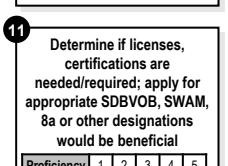
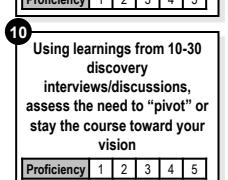
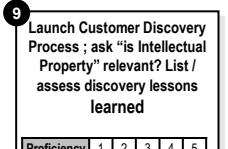
4 Broad “themes”

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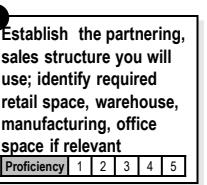
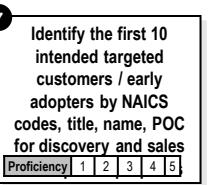
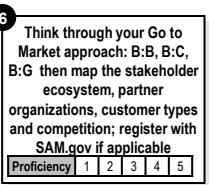
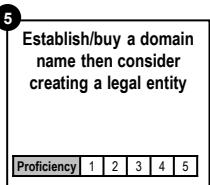
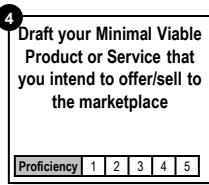
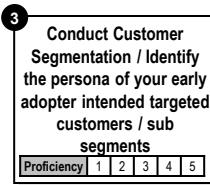
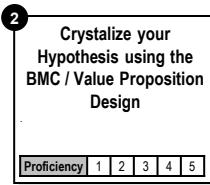
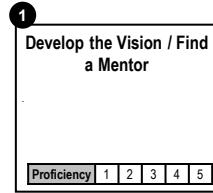
Work Blocks or “Action” Elements

Self - Assessment “Proficiency Rating”

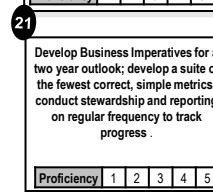
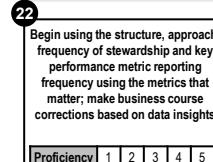
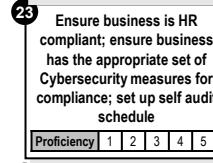
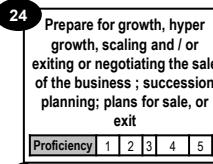
Customer Discovery, Validating the Hypothesis, Early Adopter



This “Typical” Entrepreneurial Journey Map Features:



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



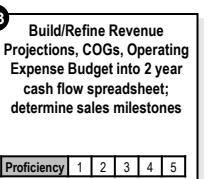
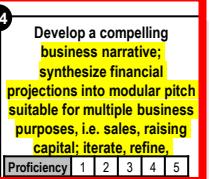
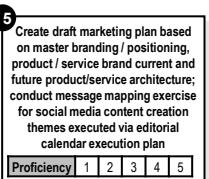
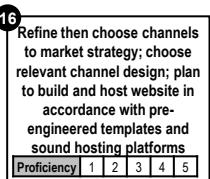
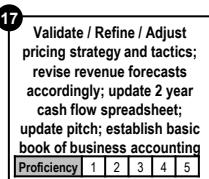
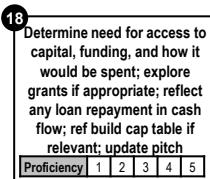
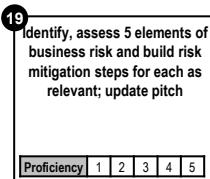
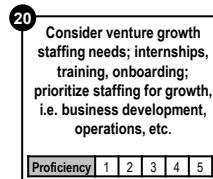
Strategic Imperatives, Metrics, Cybersecurity

CAUTION:

You risk failure in your business if
you skip the steps that
precede building your business
plan pitch

Your Pitch is ~Step 14 in this journey!!!

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



“Typical”
Roadmap

4 Broad
“themes”

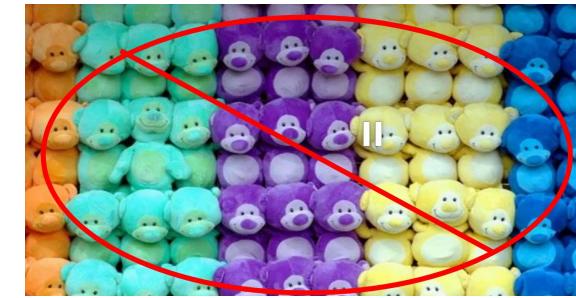
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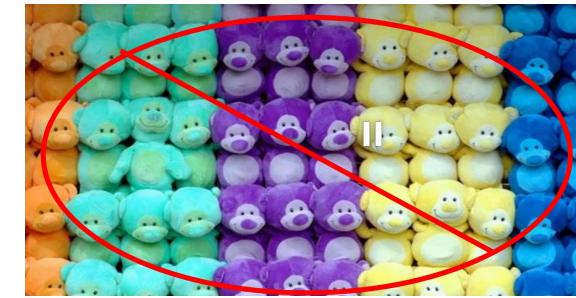


Context and Perspective: My SBDC Clients Currently Developing their Business Plan Briefings



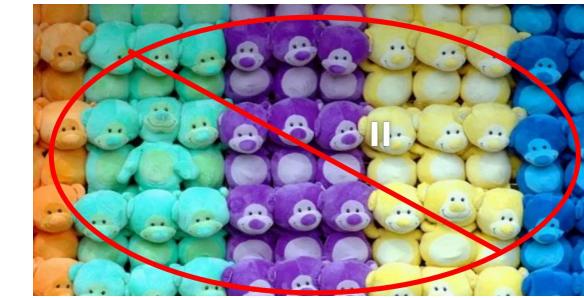
- Professional Services Consultancy
 - *for Sales / Customer Acquisition*
 - *Presentation to Major Donor(s)*
 - *Seeking VC Funding for IT DevOps*
- Non Profit Human Services Co.
- Fintech Financial Technology Co.

Context and Perspective: My SBDC Clients Currently Developing their Business Plan Briefings



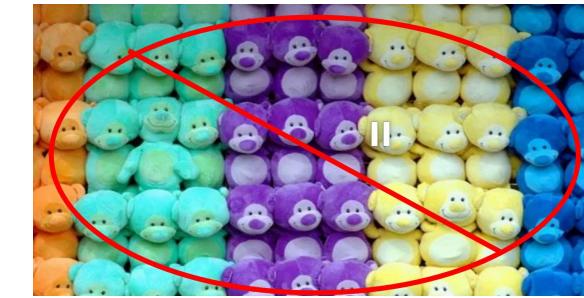
- Professional Services Consultancy
- Non Profit Human Services Co.
- Fintech Financial Technology Co.
- Ai-enabled SaaS Company
- Construction Company
- Distillery Company
- for Sales / Customer Acquisition
- Presentation to Major Donor(s)
- Seeking VC Funding for IT DevOps
- *Seeking VC Funding for IT Dev Ops*
- *Seeking Lender for Capital Equip.*
- *Seeking Lender for Capital Equip*

Context and Perspective: My SBDC Clients Currently Developing their Business Plan Briefings



- Professional Services Consultancy
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- Construction Company
 - Seeking Lender for Capital Equip.
- Distillery Company
 - Seeking Lender for Capital Equip
- Bakery/Food Company
 - *Applied for Microloan - Kitchen Equip.*
- Non-RE metals EV Motor Eng. Co
 - *Seeking Seed capital for full scale model*
- Defense Warfighting Innovation Co.
 - *Seeking investment for R&D, platforms*
- Custom Blinds Manufacturing Co.
 - Seeking financing for growth, scaling

Context and Perspective: My SBDC Clients Currently Developing their Business Plan Briefings



- Professional Services Consultancy
 - for Sales / Customer Acquisition
- Non Profit Human Services Co.
 - Presentation to Major Donor(s)
- Fintech Financial Technology Co.
 - Seeking VC Funding for IT DevOps
- SaaS Software as a Service Co.
 - Seeking Lender for IT Dev Ops
- Construction Company
 - Seeking Lender for Capital Equip.
- Distillery Company
 - Seeking Lender for Capital Equip
- Bakery/Food Company
 - Applied for Microloan - Kitchen Equip.
- GMU BioTech Engineering Team
 - Seeking Seed capital for BioTech research
- Non-RE metals EV Motor Eng. Co
 - Seeking Seed capital for full scale model
- Educational Services Company
 - Seeking Govt. Grant for development

...even clients selling their businesses and many others!

Questions?



Context Question: How many different versions do I need?

Your business plan “pitch” might be built with ***different “versions” in mind.***

The different “versions” will depend on your :

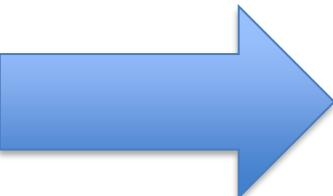
- Audience
- Purpose
- Circumstances



A Point of Perspective

As a Business Owner, Business Leader, CEO, Startup, part of a Business Venture...

...you will need several “versions” depending on the Situation.



1. **The teaser deck.**
2. **The send-ahead deck.**
3. **The presentation deck.**
4. **The leave-behind deck.**

We build different “Versions” for Different Objectives

1. Seek Funding
2. Proposal Response
3. Product/Service Sales
4. Purely Informational
5. Networking

As a Business Owner,
Business Leader,
CEO, Startup, part of a
Business Venture...

...you are your company's
best “Ambassador” and so
you are ALWAYS in a sense,
“Selling”

The Business Briefing is an Enabler !

Slightly Different Emphasis for Different Use Cases:

- Introduce yourself and your business
- Raise awareness for your company, product, service
- Deliver a Proposal / Sell something
- Seek Funding –Bank or Investor
- To get a future appointment
- Initiate a partnership
- Discovery to understand stakeholders, ecosystem
- Call to action (e.g. to get next appointment, etc.)
- In response to a request / interest from someone
- As an onboarding tool for new employees
- To educate your targeted customer segment(s)
- As a tool for follow-up campaigns
- Other uses

1. The teaser deck.
2. The send-ahead deck.
3. The presentation deck.
4. The leave-behind deck.



Perspective on the importance of your business briefing

- ***Your business briefing “pitch deck” is the new business plan***
- ***The deck is the “lingua franca” (i.e. adopted as a common language between speakers whose native languages are different) of modern startup investment.***
- ***People will ask for it constantly. So be prepared to deliver it.***
- ***Your “pitch deck” is your business calling card When you send it to someone, you expect a call back, second look, a chance to explain your business.***

Source: Venture Capitalist Guy Kowalski

Perspective on the importance of your business briefing

"In order to build conviction, we rely on founders to tell us a compelling story, almost always in the form of slides.

We've funded companies almost entirely because of the quality of their seed decks.

Poor deck? We'll likely pass on the opportunity."



From a VC speaking to

 **PitchBook**

For GovCon...

Q: What is the Relevance of your
Business Briefing
(and its elements)
in a Government Contracting
Scenario / Context?



A: Your “*Pitch*” is an essential commercialization element!



The Small Business Innovation Research (SBIR) program is a United States Government program, coordinated by the Small Business Administration, intended to help certain small businesses conduct research and development. Funding takes the form of contracts or grants. The recipient projects must have the potential for commercialization and must meet specific U.S. government R&D needs. The Small Business Technology Transfer Research Program



Chapter 3 / Proposal Preparation Instructions and Requirements

...

Sec. 3.4 Phase II Proposal Requirements

3.4.4 Technical Proposal

Part 7: Commercialization and Business Planning (Required minimum of 2 pages; no more than 8 pages)

NASA is requiring Phase II offerors to provide commercialization and business planning information in the proposal

and is enforcing a requirement that firms provide a minimum and a maximum amount of information as required by page length. Firms that do not meet this requirement may be considered nonresponsive to this requirement and the proposal may not receive a score under Section 4.4.2: Factor 4: Commercialization and Business Planning, which could result in an overall lower score for the proposal.

The Commercialization Plan should provide the following information to communicate and validate that the firm has the knowledge and ability to commercialize the innovation being proposed and to validate the company's future viability and financial viability.

Example of Commercialization Language

" Below are a minimum set of specific requests for information that firms should provide in the Commercialization Plan. The Commercialization Plan should validate that a **quantitative market analysis** has been completed and that the innovation has a **convincing value proposition**. The Commercialization Plan should demonstrate that **pro forma financial projections** for the firm have been **developed and validated** to confirm the **stability of the company**.

The Commercialization Plan should also address how to protect intellectual property (IP) that results from the innovation and **whether the firm plans to receive any assistance and mentoring**.

Chapter 3 / Proposal Preparation Instructions and Requirements

...

Sec. 3.4 Phase II Proposal Requirements

3.4.4 Technical Proposal

Part 7: Commercialization and Business Planning (Required minimum of 2 pages; no more than 8 pages)

Example of Commercialization Language

Commercial Potential—Quantitative Market Analysis

Describe the market segment and potential commercial total addressable market (TAM) that is appropriate to the proposed innovation.

- a. Indicate how the market was validated and what assumptions were used in the analysis.
- b. Indicate the market size by providing the scope in dollars if possible.
- c. Indicate market segmentation and/or TAM in dollars if possible.
- d. Indicate the projected percentage of the offeror's market share in 2 to 3 years after entry into the identified market.

Describe the proposed innovation in terms of target customers (e.g., NASA, other Federal agency, or commercial enterprise).

Describe the competitive landscape, by identifying potential competitors.

- a. Indicate potential competitors by company name within the identified market.
- b. Discuss the barriers to entry and how many years it would take a competitor to enter this segment in terms of capitalization, technology, and people.
- c. Describe how the proposed innovation is different from current and future competitors.

Chapter 3 / Proposal Preparation Instructions and Requirements

...

Sec. 3.4 Phase II Proposal Requirements

3.4.4 Technical Proposal

Part 7: Commercialization and Business Planning (Required minimum of 2 pages; no more than 8 pages)

Example of Commercialization Language

Commercial Intent—Value Proposition

Describe the commercial development.

- a. Include the development **timeline** to bring the innovation to market.
- b. Describe the **applicable business model** (spin-out, license, original equipment manufacturer (OEM), etc.) the offeror would use to bring the innovation to market.
- c. Indicate the **channels of distribution** (direct sales, distributors, etc.) that would be used in bringing the innovation into the identified market.
- d. Indicate the **pro forma 2- to 3-year revenue dollar projections** based on the proposed *innovation's penetration of the identified market*.
- e. Describe any follow-on development (long term > 5 years) plans to expand your proposed innovation's market presence.

Describe the **risks to the commercial development plan and what mitigations**, if any, can be taken over a reasonable period of time to lessen the risks.

Chapter 3 / Proposal Preparation Instructions and Requirements

...

Sec. 3.4 Phase II Proposal Requirements

3.4.4 Technical Proposal

Part 7: Commercialization and Business Planning (Required minimum of 2 pages; no more than 8 pages)

Example of Commercialization Language

Commercial Capability—How Will the Innovation Enter into a Market?

Describe the current and future company capitalization efforts.

- a. Provide a pro forma forecast based on income statements, balance sheet(s), and statement of cash flows. These forecasts should indicate current and projected revenues, expenses, and other items that are calculated as a percentage of future sales.
- b. Discuss the operations/manufacturing and business staff conducting the project and how they will be utilized to achieve commercialization.
- c. Describe the physical plant, including facilities and the capital equipment, tooling, and test equipment used to conduct the investigation and how they will be utilized to achieve commercialization.
- d. Discuss consultants, incubators, and research institutions that will be utilized to achieve commercialization.
- e. Indicate how the innovation will enter into production (i.e., in house or through a licensee or other means) and what changes (if any) will be made to company capitalization for commercialization.

As applicable, describe the approach, path to market, and revenues from past commercialization(s) resulting from SBIR/STTR awards disclosed in the Commercial Metrics Survey (CMS). (Companies with no SBIR/STTR awards or only fairly recent SBIR/STTR awards will not be penalized under past performance for the lack of past SBIR/STTR commercialization.)

Chapter 3 / Proposal Preparation Instructions and Requirements

...

Sec. 3.4 Phase II Proposal Requirements

3.4.4 Technical Proposal

Part 7: Commercialization and Business Planning (Required minimum of 2 pages; no more than 8 pages)

Example of Commercialization Language

Assistance and Mentoring

Describe the existing and future business relationships in terms of any formal partnerships, joint ventures, or licensing agreements with other companies/organizations.

Describe the plans for securing needed technical or business assistance through mentoring, partnering, or through arrangements with state assistance programs, **Small Business Development Centers (SBDCs)**, Federally-funded research laboratories, Manufacturing Extension Partnership centers, Federal programs, or other assistance providers.

- “Commercially viable, dual-use technologies that address strategic gaps in defense capabilities.”
- “Innovations that demonstrate potential for scalability, cost-effectiveness, and operational impact.”

About the Defense Innovation Unit

The Defense Innovation Unit (DIU) strengthens national security by **accelerating the adoption of commercial technology** in the Department of Defense and bolstering our allied and national security innovation bases. DIU partners with organizations across the DoD to rapidly prototype and field dual-use capabilities that solve operational challenges at speed and scale. DIU is the Department's gateway to leading technology companies across the country.

Questions Thus far ?



Lets take a quick look at some **Cautionary Steps** needed **BEFORE** beginning to develop your Business Briefing.

Ideally, Mentor Guided



"Typical" Small Business Entrepreneurial Journey



Small Business Entrepreneurial Map – Original Work by George S. Suga, Senior Business Adviser, Mason SBDC – Copyright March 2025

Ideally, Mentor Guided

CAUTION



Solid Foundation Needed !

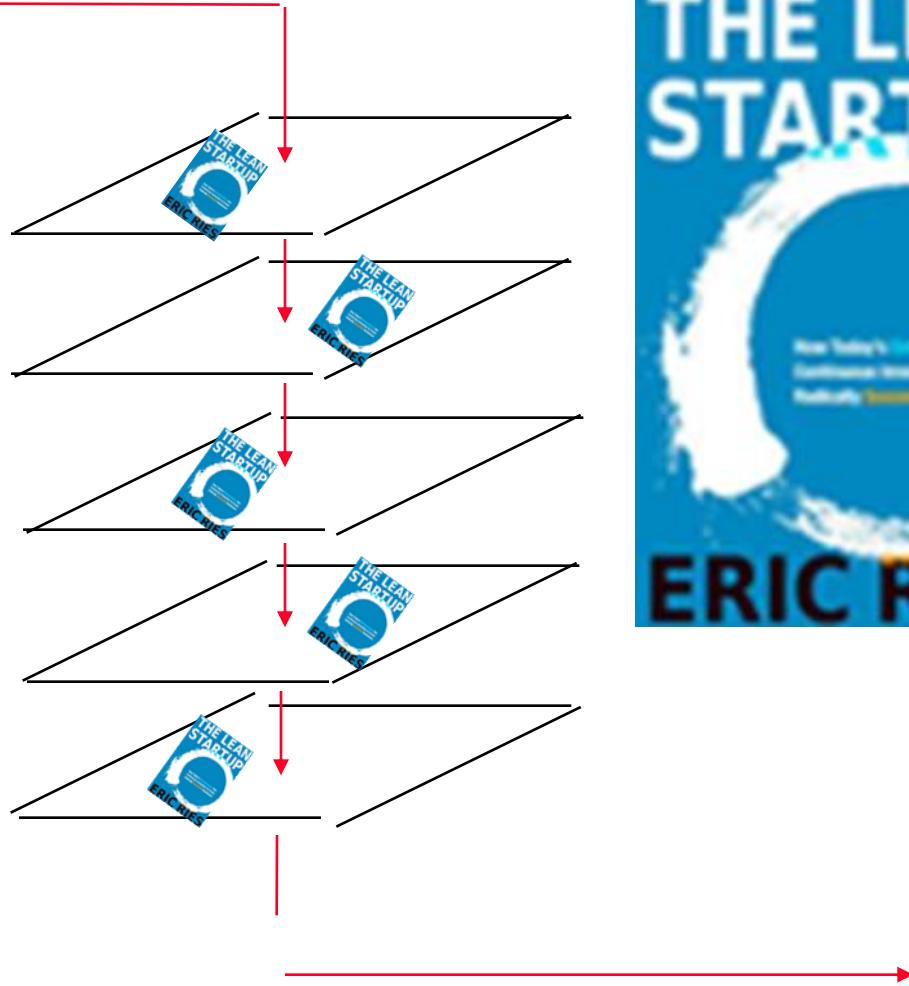
- *Validated Value Proposition Design?*
 - Products/Services create and communicate value / benefits
- *Validated Problem -Solution -Market Fit?*
 - Differentiated Products/ Services Relieve customer “pain profile”
- *Validated Business Model?*
 - Products / Services will capture value, help monetize, grow, scale

Lean Principles apply to :

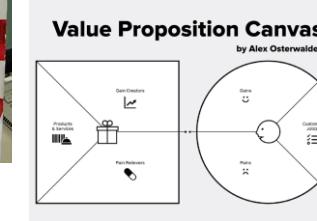
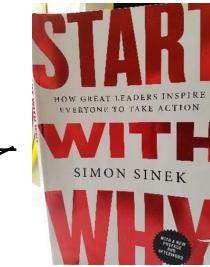
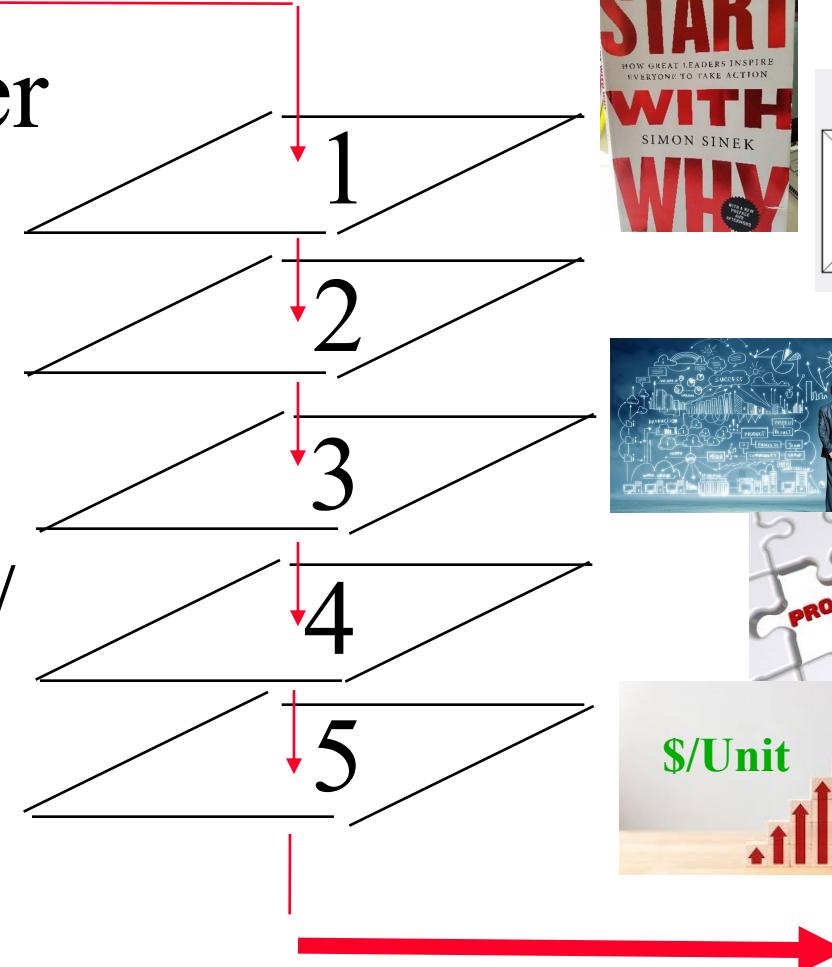
- aspiring businesses
- start-ups
- early and seed stage business
- established / mature businesses

Lean Startup Principles - “*Filters*” for Developing the Business Briefing

*Q: Have we taken those “foundational steps” **prior to** building our “Pitch”?*



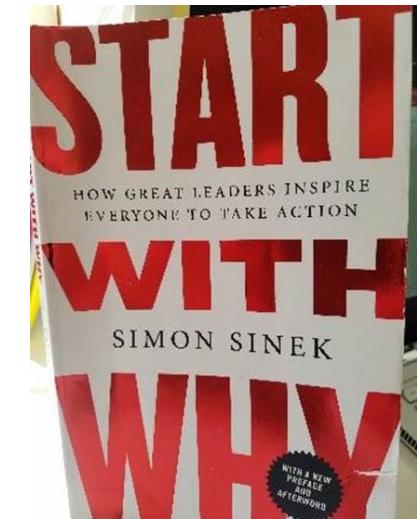
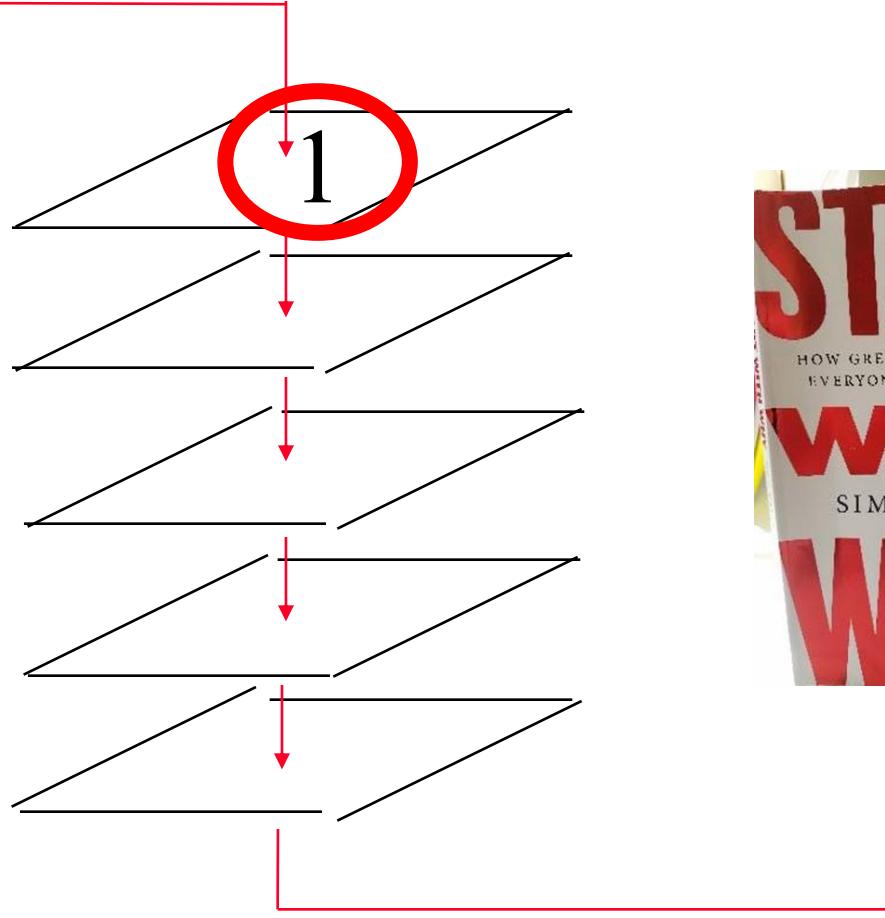
5 Filters to consider
Prior to
Developing
Your
Business Briefing /
Business Plan
Narrative :



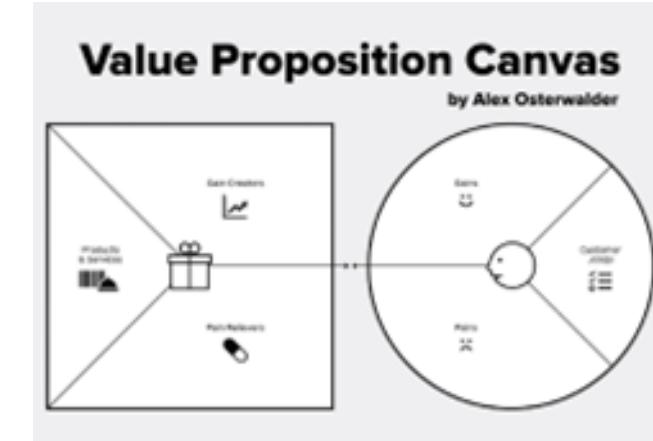
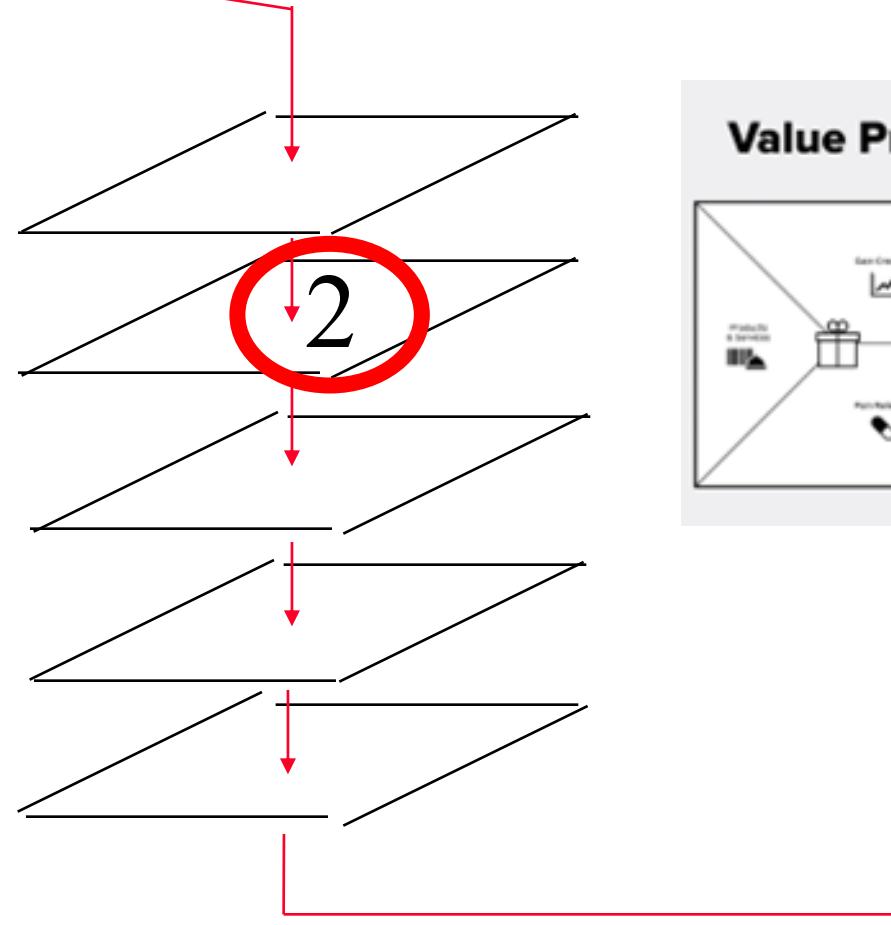
*How prepared are
we to answer
these critical
questions?*

Lean Startup Principles - Filters Prior to Developing the Business Briefing

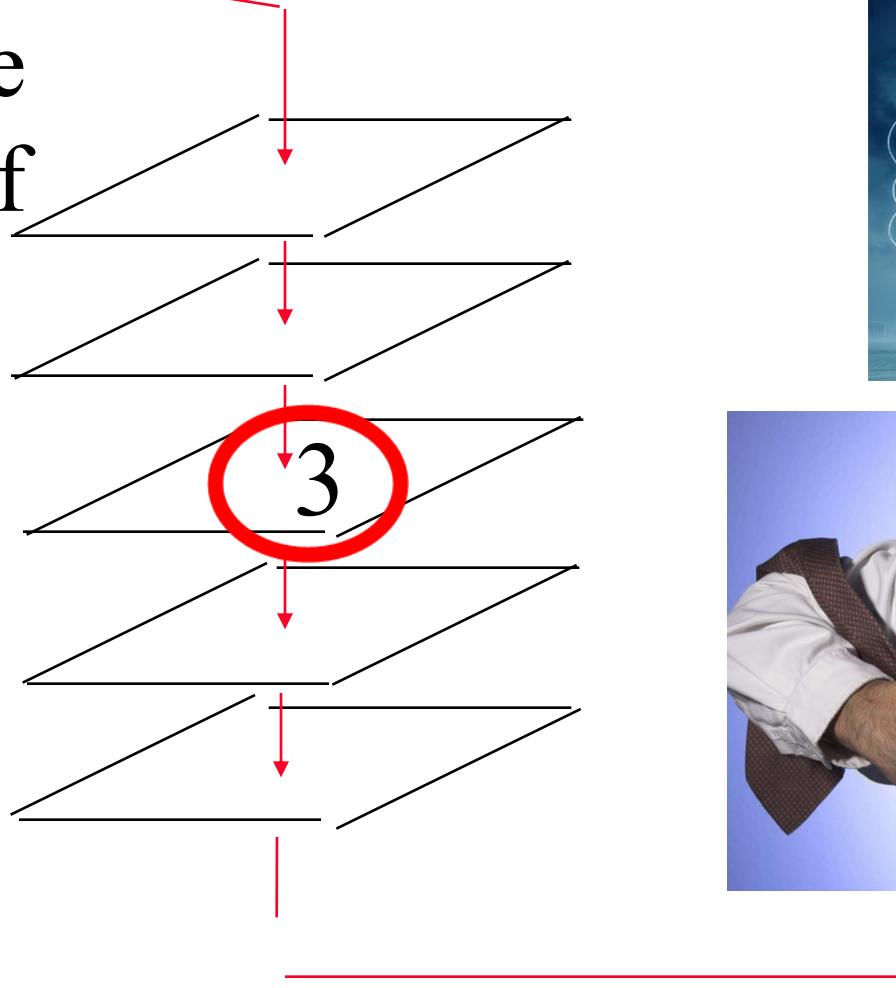
We can describe in clear and compelling language company *values and “why” our company exists?*



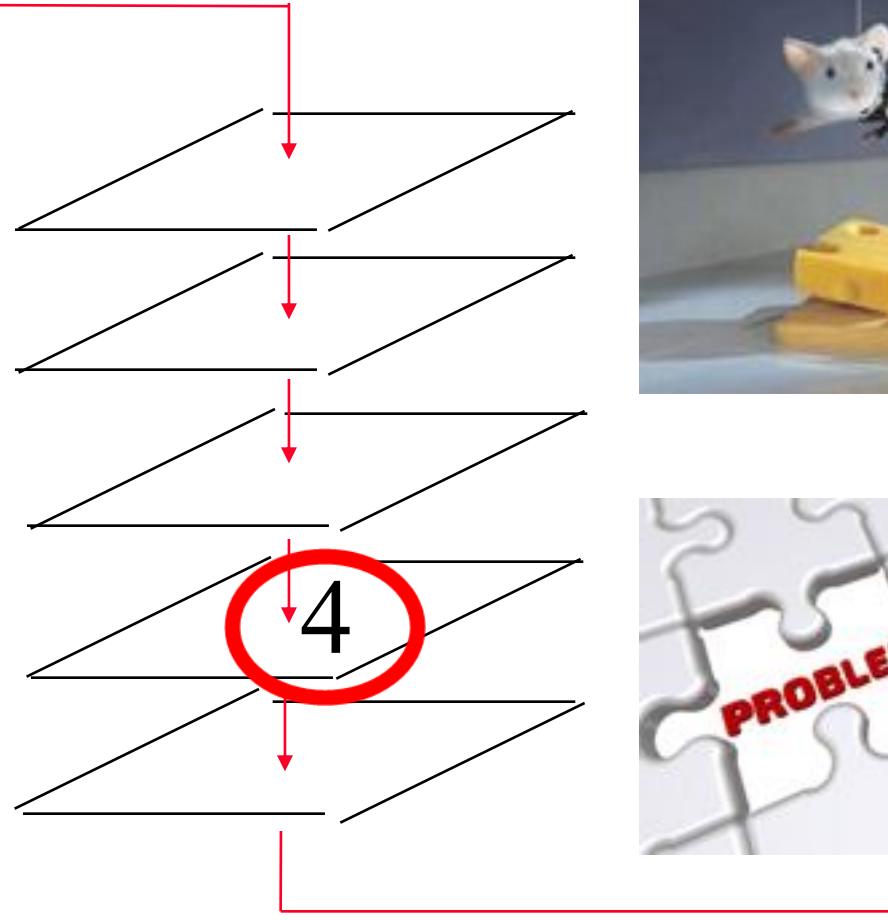
- We have a validated **Value Proposition Design (VPD)** worksheet.
- We know (with specificity) our targeted customer segments.
- We have a unique and differentiated solution to a market problem



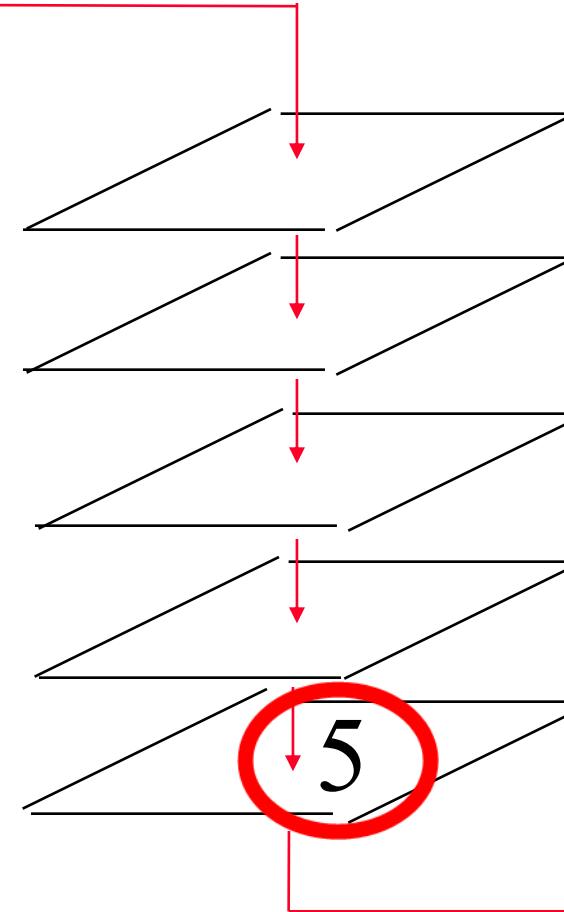
We are *subject matter experts (SMEs)* in the issues and statistics of our industry and can *place our offering in perspective and in context of the bigger industry ecosystem?*



We can *describe the problem we are solving*, and *how our unique and novel solution, vs. competition, works to create benefits* for a specific group of *clients and customers*



We have done market validation *that our products and services, our business model and price points, create and communicates value* to our specific target customer segments and our business is sustainable and scalable

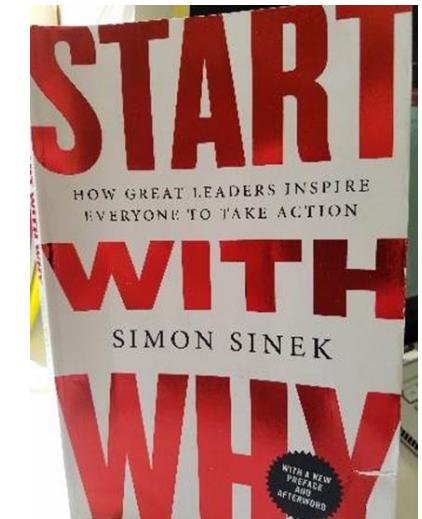
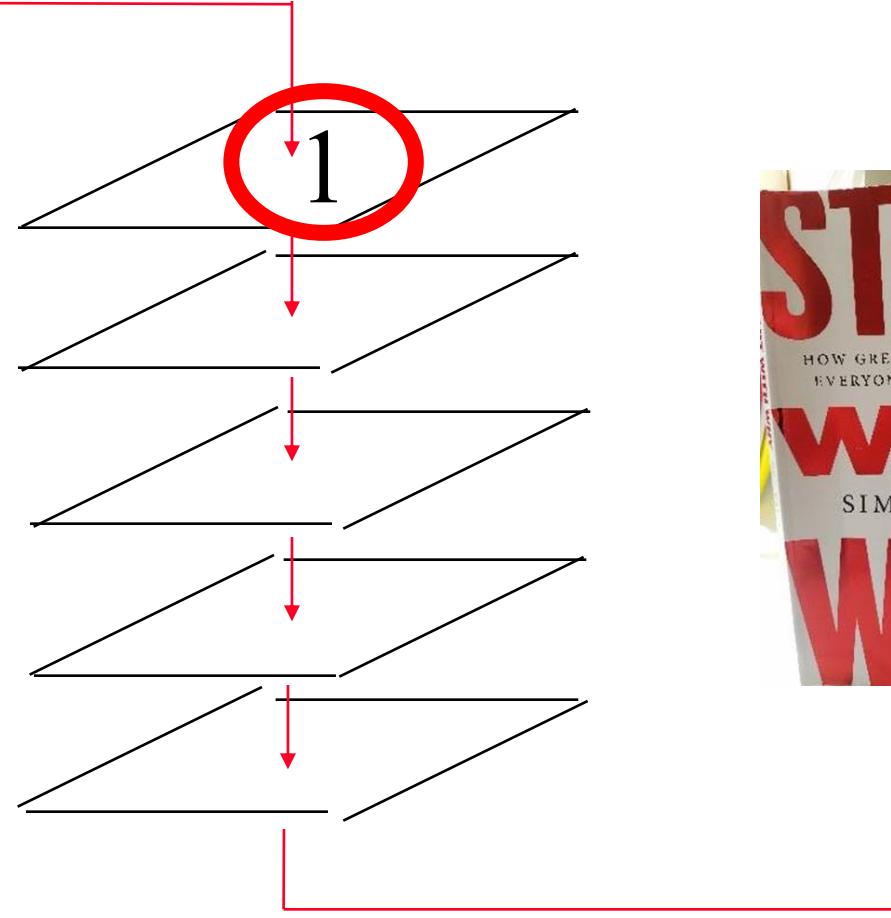


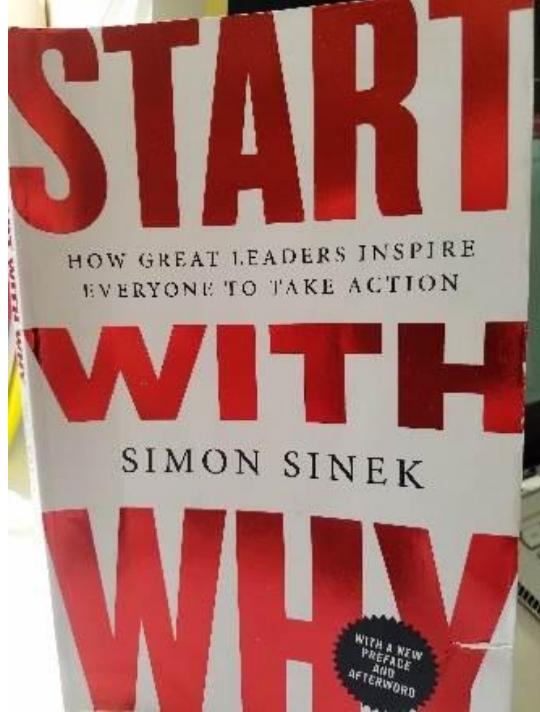
We have talked to 30 people in the Proposed “eco system”



Lean Startup Principles - Filters Prior to Developing the Business Briefing: A closer Look

We can describe in clear and compelling language company *values and “why” our company exists?*



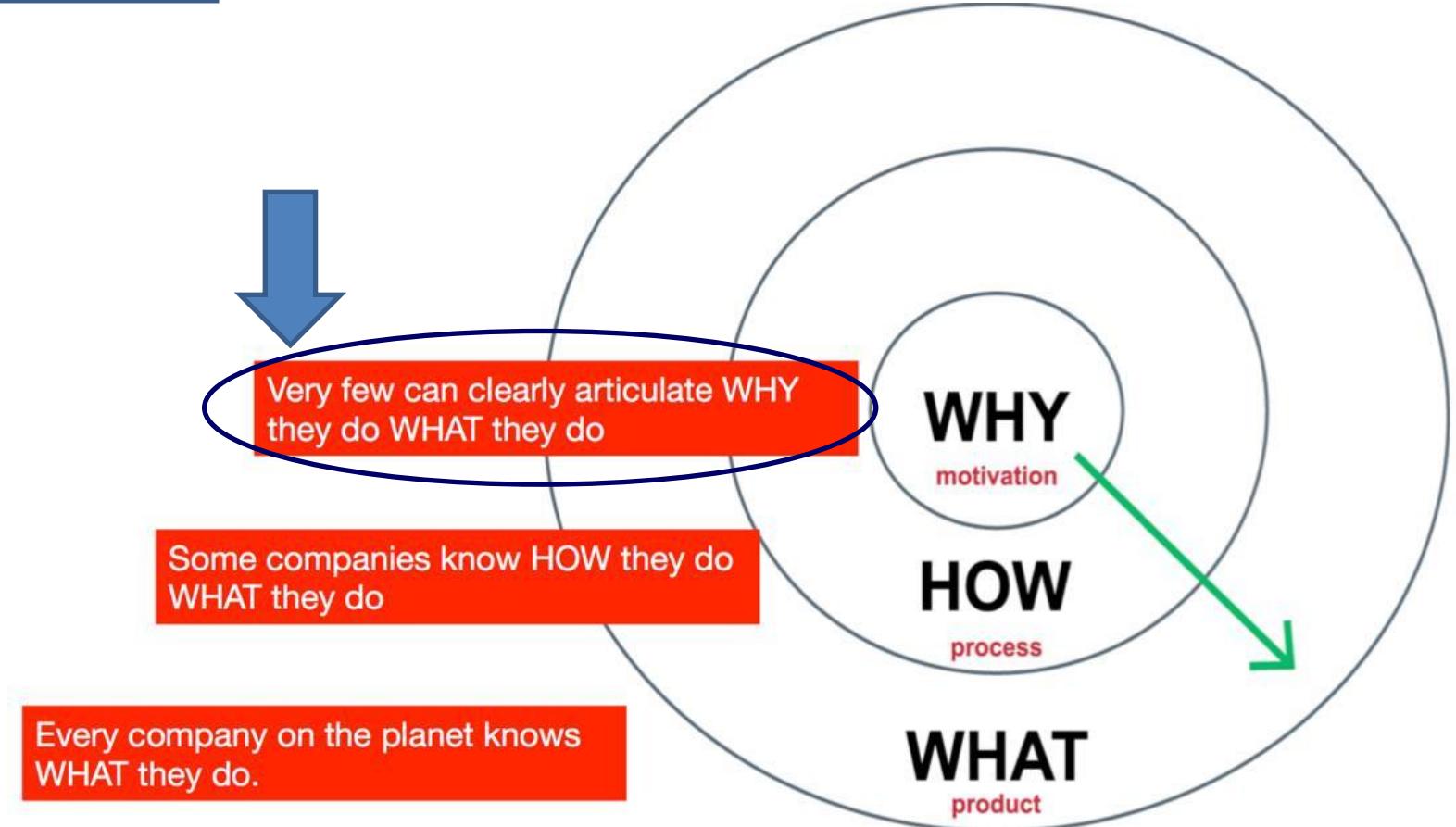
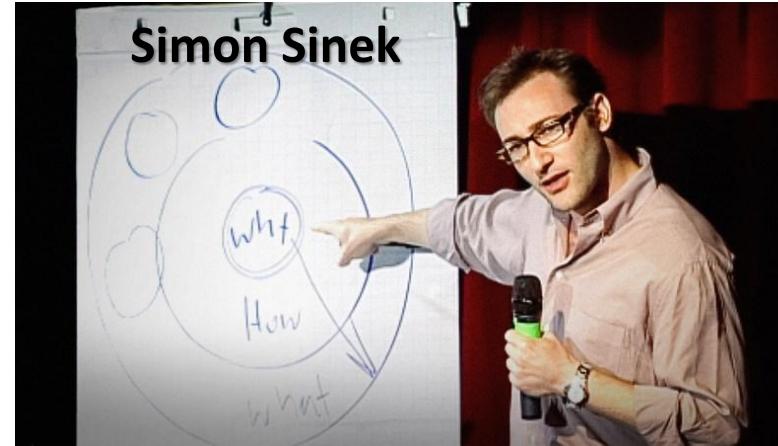
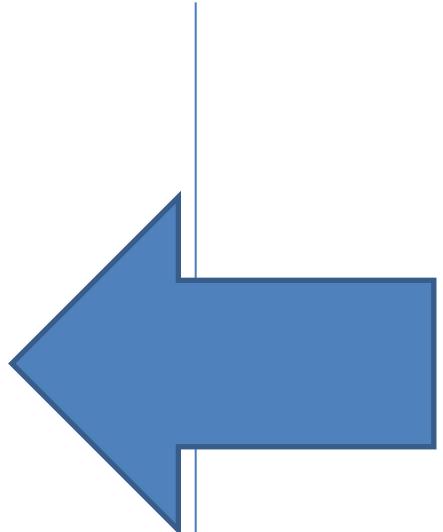


What purpose, cause or belief underpins your Business ?

Why did you start this ?

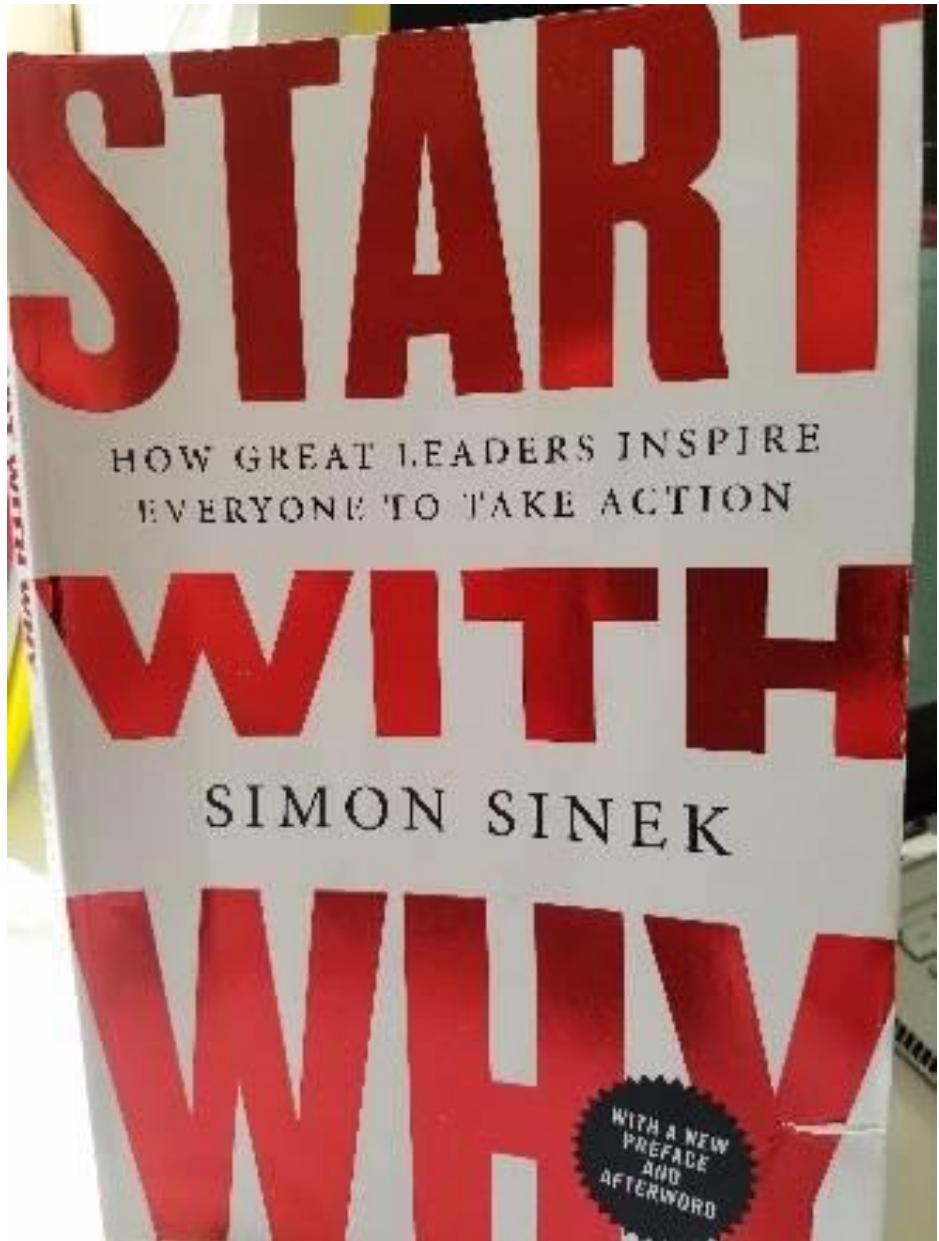
Why do you do what you do ?

What is your company's Core Values which you will never stray from ?

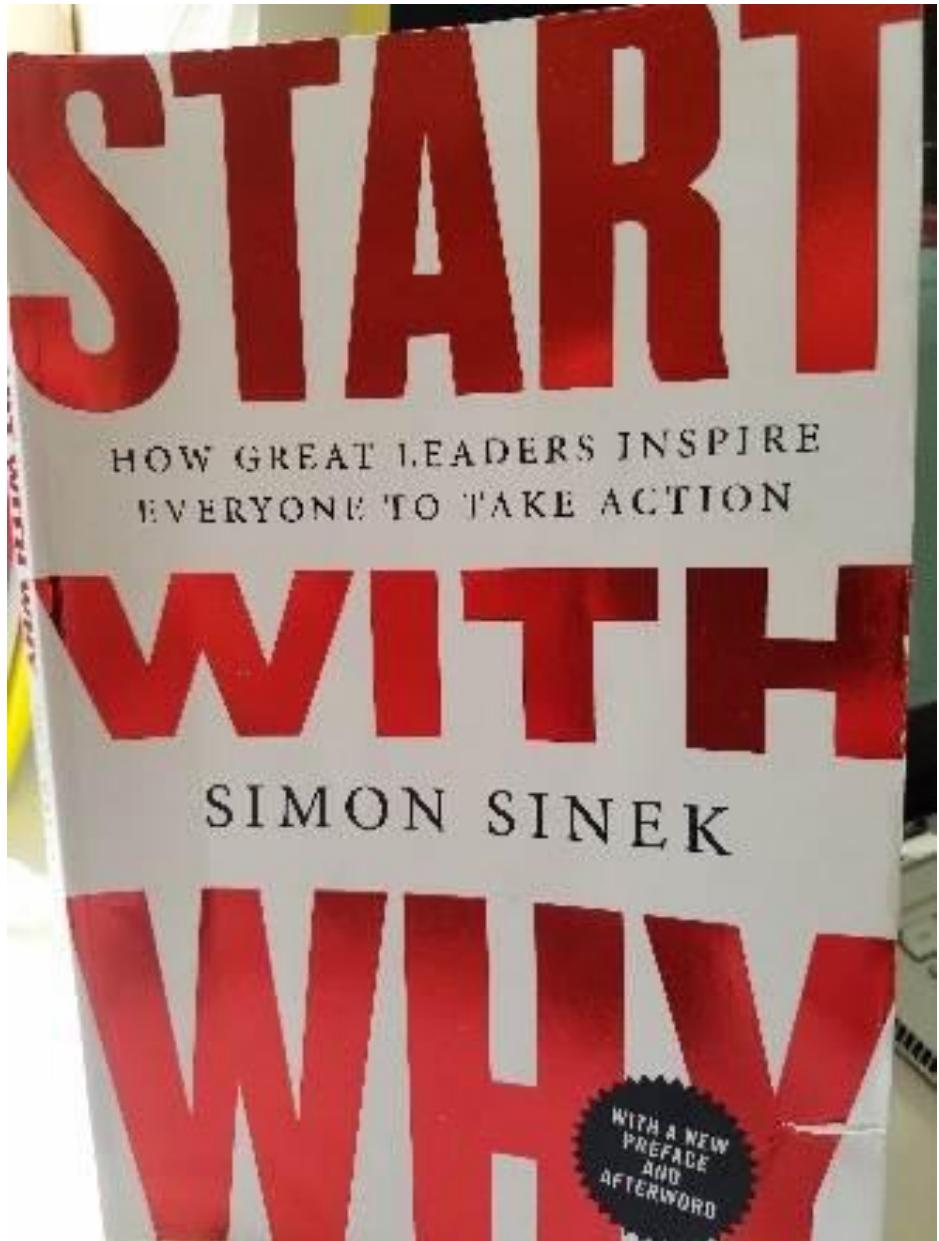


Some companies know HOW they do WHAT they do

Every company on the planet knows WHAT they do.



Two Notable “WHYS”



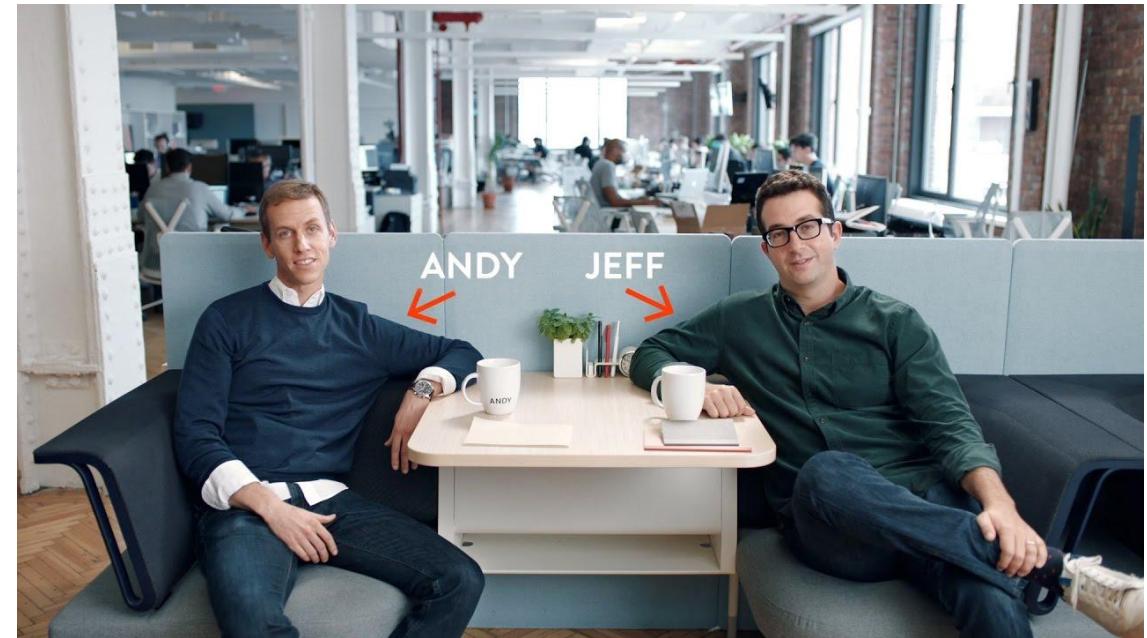
Two Notable “WHYS”

Jeff Raider created Harry's in 2012 because he was sick and tired of overpaying for overdesigned razors.

He was tired of standing around waiting for the person in the drugstore to unlock the cases so they could actually buy them.

He wanted to serve people in a real way. **His “WHY” was a question :**

- ***“Should it really take over 10 minutes and cost \$25 for a few razor blades and some shaving cream?”***



<https://www.forbes.com/sites/alejandroremades/2019/04/14/the-entrepreneur-behind-warby-parker-and-harrys-founded-not-one-but-two-billion-dollar-companies/#5d4e4e76193f>

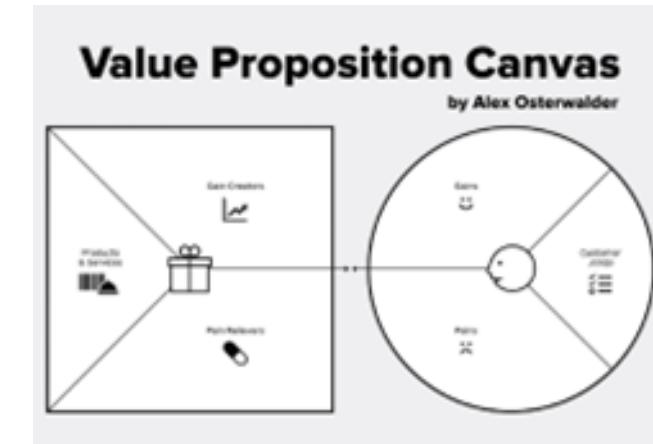
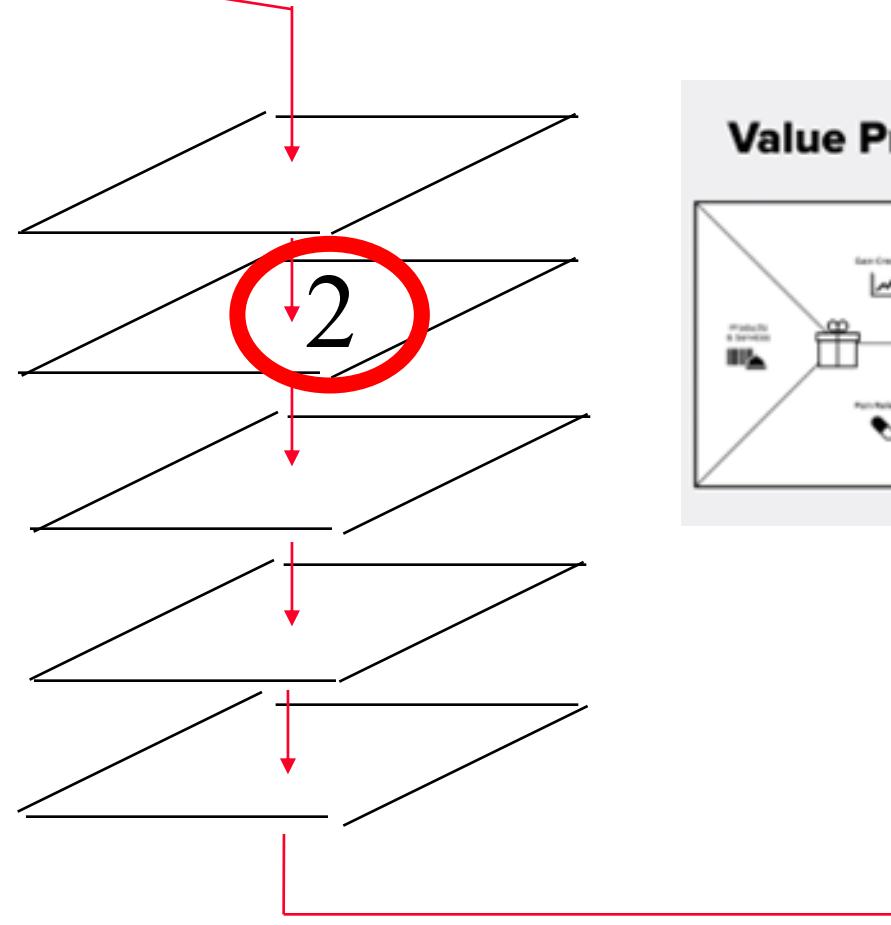
Bombas launched in 2013, after **founders** Randy Goldberg and David Heath learned that socks are the most requested clothing item in homeless shelters.

Their “WHY” was to establish the brand's mission to donate one pair of socks for every pair purchased.

By April 2020, **Bombas** had donated 35 million pairs of socks.



- We have a validated **Value Proposition Design (VPD)** worksheet.
- We know (with specificity) our targeted customer segments.
- We have a unique and differentiated solution to a market problem





"Value proposition is **essential** for achieving **business success**."

"By understanding your target customers, analyzing the competition, and creating a compelling and unique value proposition, you can **differentiate your business, attract and retain customers, and drive long-term growth**."

"Continuously refine and optimize your value proposition (product or service) based on customer feedback and market trends **to ensure it remains relevant and impactful.**"

Source: Clive Keyte at Intrafocus Limited

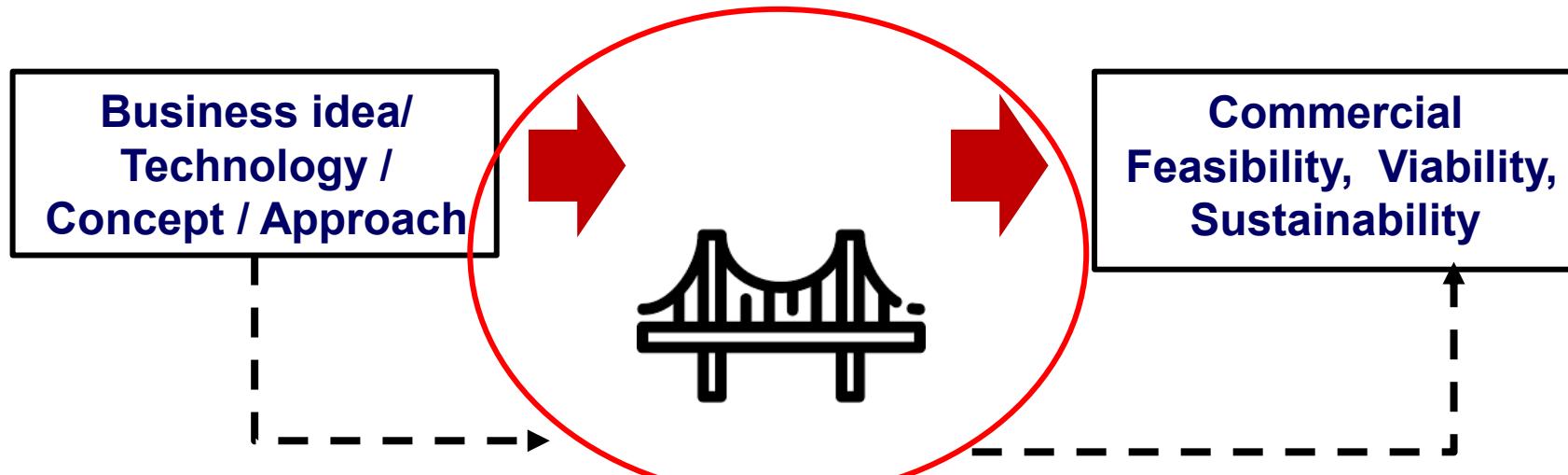
[Value Proposition - A Comprehensive Guide - Intrafocus](#)

The VPD forms a rock solid business foundational platform.

It is a framework to better position and align your capabilities to your customers' needs.

It helps you create real value...which attracts buyers.





Business must aspire to
1)Create, 2)Communicate, 3)Deliver,
and 4)Capture (Market) Value...

...to ensure we get across the valley of death!

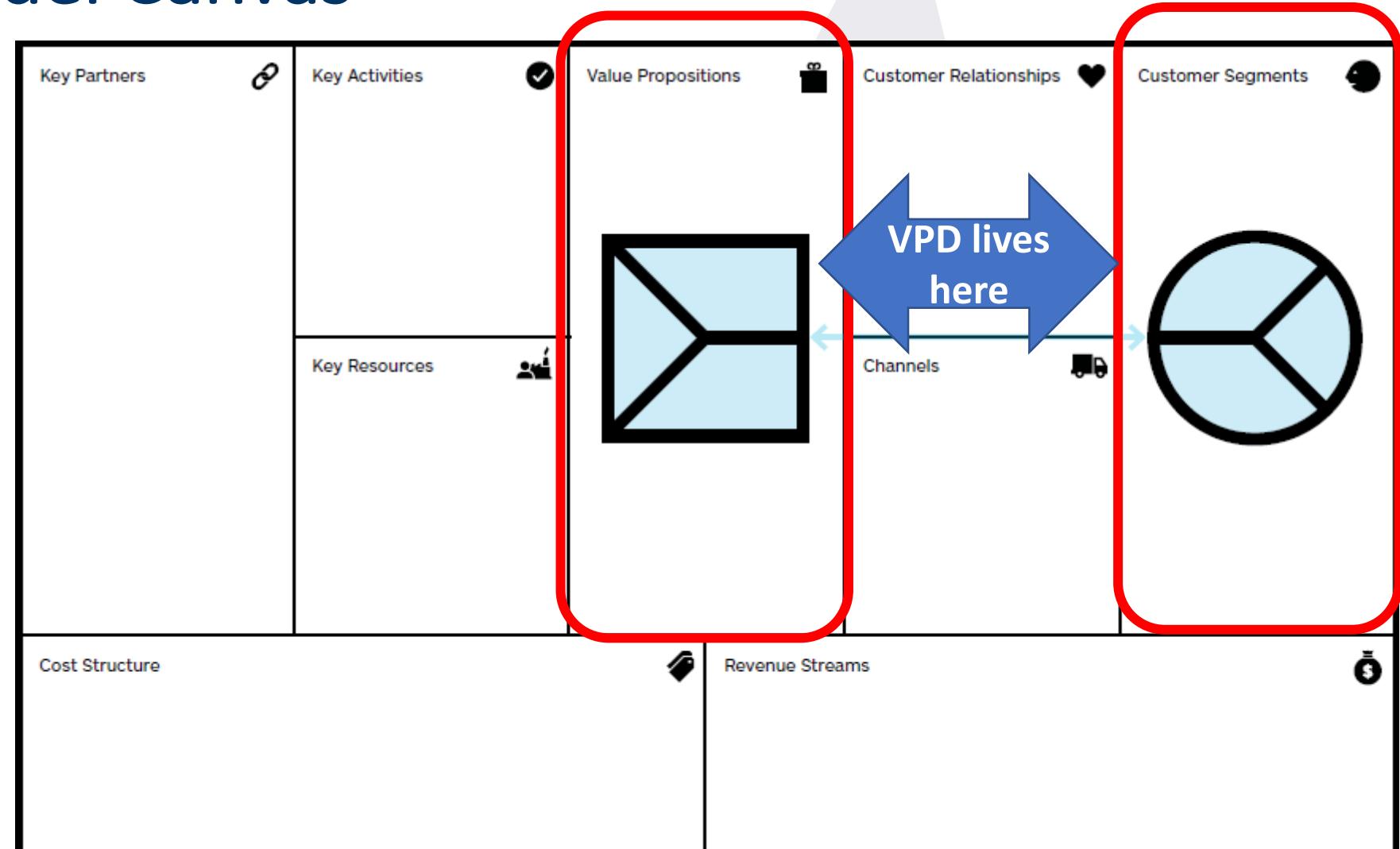
...and the Value Proposition Design (VPD) is at the heart of the Business Model Canvas

It is a strategic management and lean template for developing new (or documenting existing) business models.

It is a simplified visual map having 9 elements describing a firm's product's / service value proposition, relationships, customers, and financials.

It creates common language and a shared understanding around the firms' business approach.

It is an alignment tool that helps firms manage highly inter-related activities.

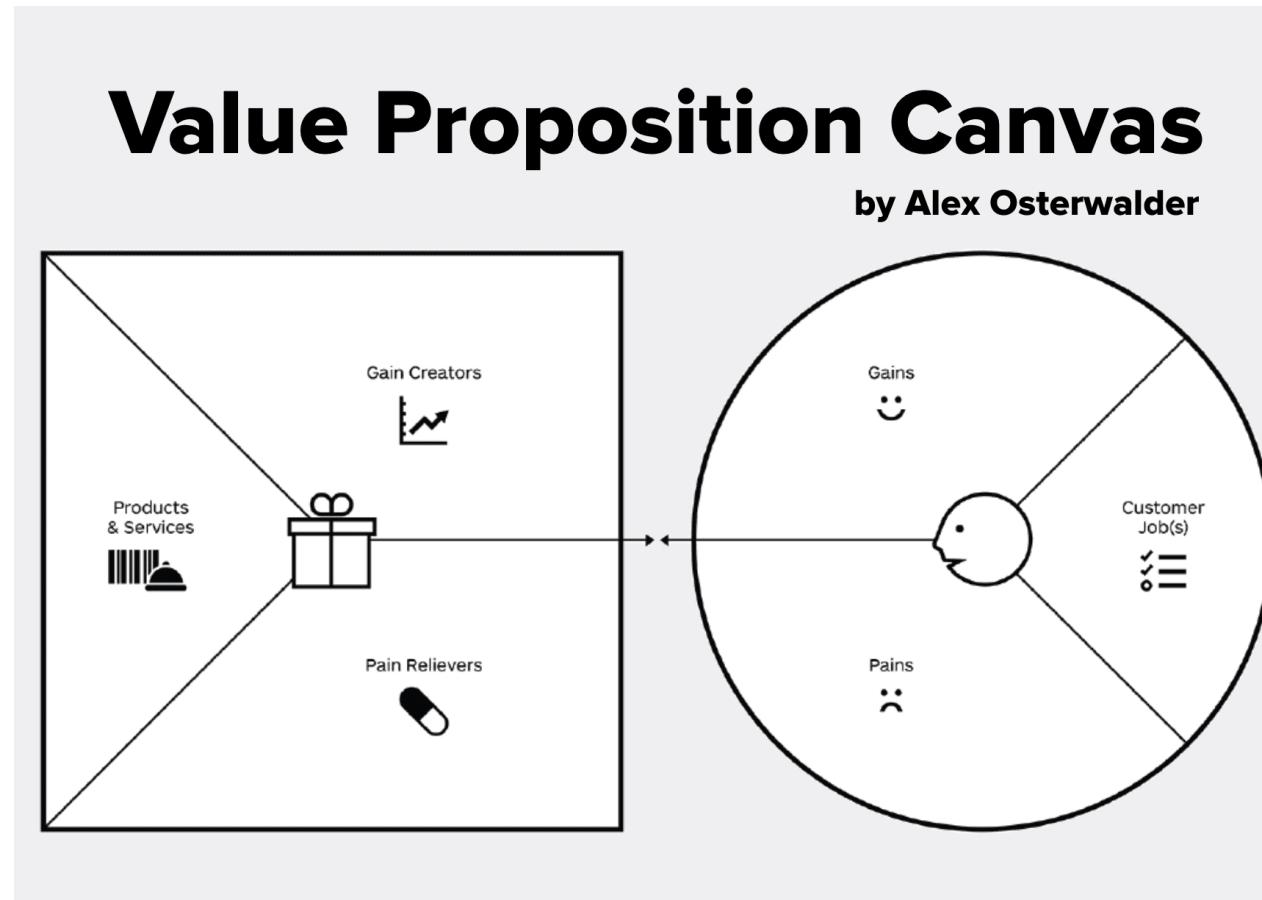


Source: en.wikipedia.org

A clear value proposition is at the core of every good business model and business briefing

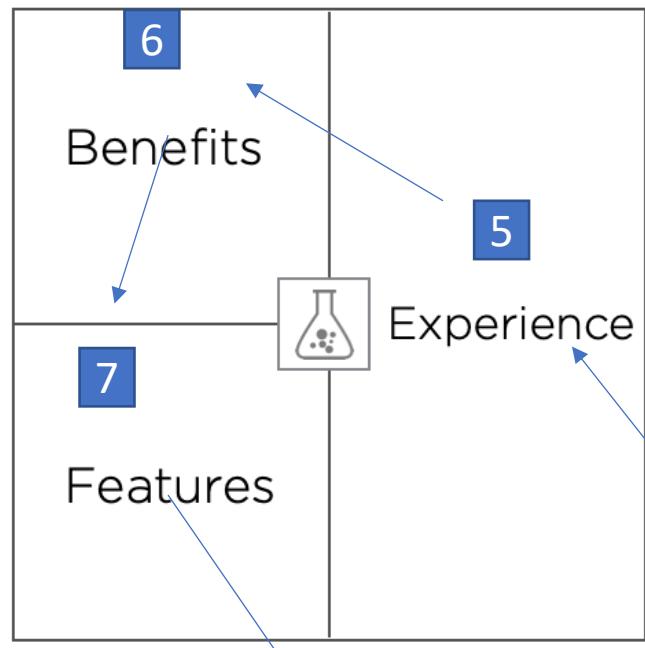
Defining your Value Proposition clearly can take your business to the next level

- Your Value Proposition drives new customer acquisition and fosters customer loyalty over time



Value Proposition Canvas

Your Product/ Service



Company:
Product:
Ideal customer:



Start on the Customer Side
...steps 1-4

Value Proposition
Design starts with a
focus on :
*customer jobs to be
done, needs, and
available
substitutes...*

*...competitors,
incumbents*

Based on the work of Steve Blank, Clayton Christensen, Seth Godin, Yves Pigneur and Alex Osterwalder. Released under creative commons license to encourage adaption and iteration. No rights asserted.

VPD continues by examining the level of *alignment between your (hopefully) differentiated market offering and your segmented, targeted client/customers' needs*

Move to your Offering Side.

...steps 5-8

Synthesize your findings and align it with your products/service offering

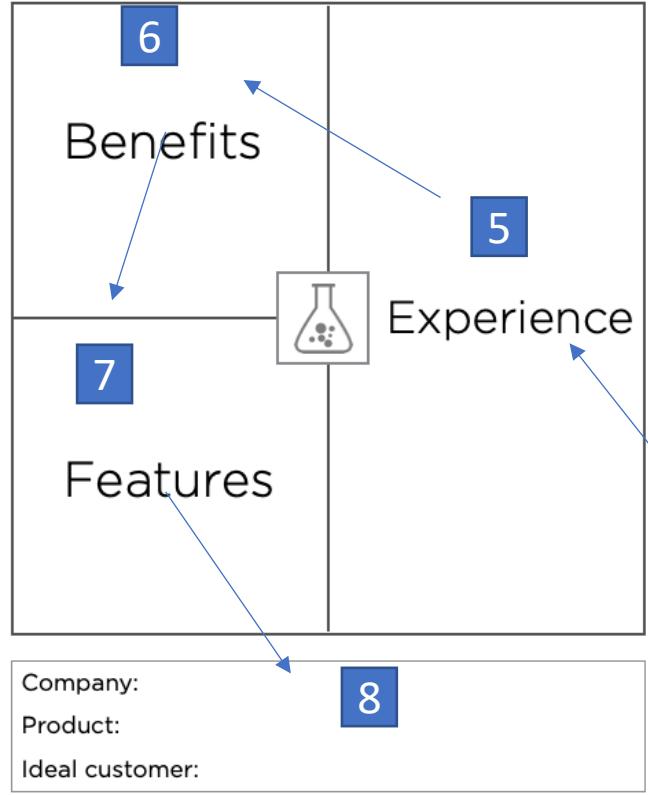


Your Product /
Services Offer/ Cap
Statement / Website

Benefits
Features
Points of
Differentiation

Value Proposition Canvas

Your Product/ Service



Customer



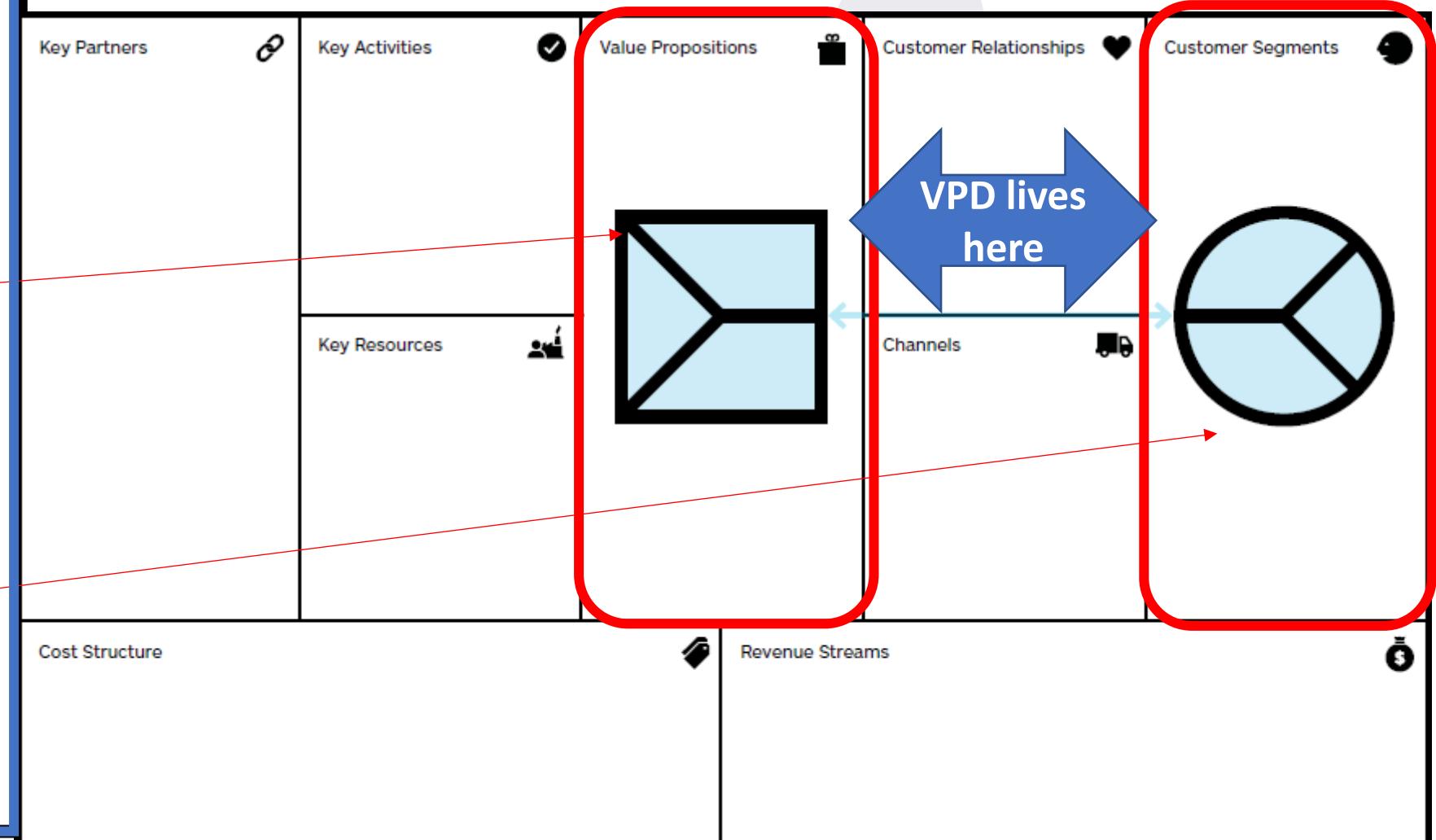
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We can't overstate importance of VP Design



- Competitive Incumbent strengths & gaps
- Subtle differences in what the customer wants and needs
- A very strong, aligned Capabilities Statement
- Your Business Briefing / pitch
- Your Marketing Strategy Brand Positioning
- Web Site Elements
- Organic Search Tags
- ...and more

NOTE:
You do not have a sustainable business unless you have a product/service offering (square) that creates real value that a specific client or customer (circle) will pay for.



NO COST Value Proposition Design Webinar !

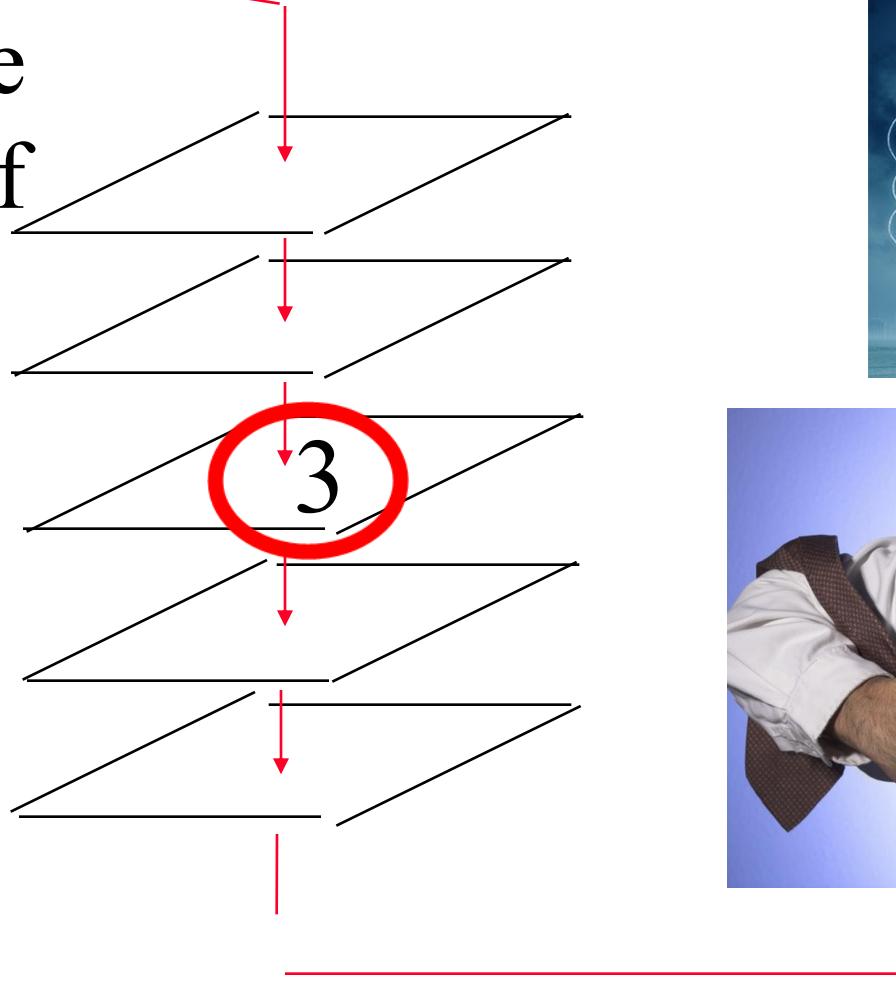
Building Your Value Proposition Design (VPD) - *Webinar
(Live)* - PW

**Feb 19th, 10am to
Noon**

Webinar Learning Objective

Please join Senior Business Counselor, and Adjunct GMU Professor George Siragusa, as he guides you through a step-by-step process of building your Value Proposition Design which is invaluable to startups, early stage companies, growth, or even mature businesses! The Value Proposition Design (VPD) is a **framework** that enables businesses to **develop and solidify their foundational ideas** for how they **will create, communicate, deliver and then extract marketplace value** for a **differentiated product or service** intended to **solve a specific problem aligned with a specific customer need** while **delivering tangible benefits**, for an **intended potential customer segment** in a **domain space or industry sector**. It lives inside something called the **Business Model Canvas**, another important foundational business framework.

We are *subject matter experts (SMEs)* in the issues and statistics of our industry and can *place our offering in perspective and in context of the bigger vertical industry ecosystem?*



Q: Are you a “SME”, a Subject Matter Expert in the Domain Space you play in ?

Have you put your “story” into a larger context ? Use statistics from reputable sources ?

... “Market” is very large

- \$s revenue is _____

... “Market” is growing

- x% yr-on-yr (CAGR)

... ***you know your competitors***

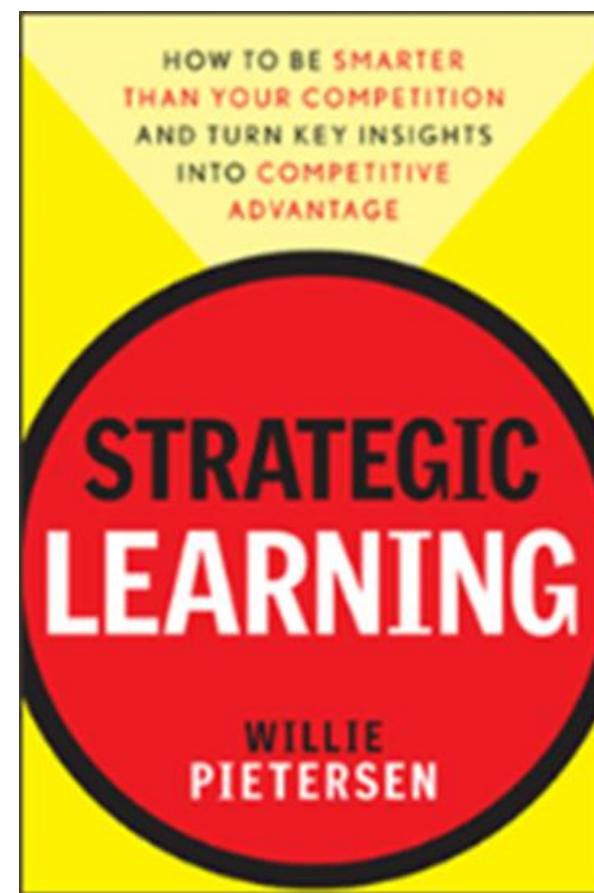
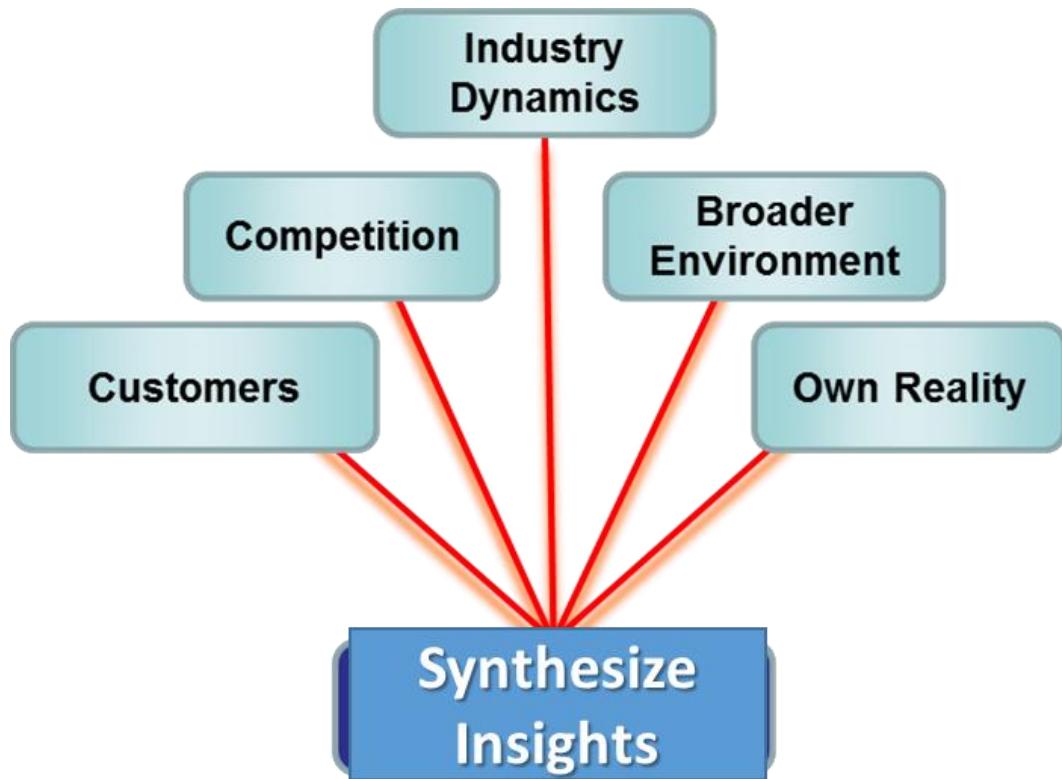
- ***gaps, weaknesses...***

... you have cited references!



You've done the **homework** to be trusted and credible !

Q: Are you a “SME”, a Subject Matter Expert in the Domain Space you play in ?



Q: Have you “mined” for insights making you trusted and credible?
Q: Have you tested / validated your business hypothesis?



Do You Really

**KNOW YOUR
CUSTOMER**

?





Do You Really ?

KNOW YOUR

**Government
Customer**





Do You Really **KNOW YOUR CUSTOMER**

Segmentation ?





Do You Really

**KNOW YOUR
CUSTOMER**

Persona?



Do You Really
**KNOW YOUR
COMPETITORS**





Do You Really **KNOW YOUR**

Points of Differentiation?

Strategic Advantage?

Your Secret Sauce?

?





Do You Really KNOW YOUR

Market or Customer
Feedback?

?





Do You Really

**KNOW YOUR
CUSTOMER**

?



- what domain space, industry sector, segment they are in?
- how big in US Dollars is the market for the products and services sold into this domain or industry sector or segment?
- what is the “persona” / personality of the customer/client in this sector/segment?
- who are these customer / clients by title and function inside their organization?
- who specifically in the organization, by name, has the (budget) authority to make purchasing decisions?
- what is their budget for these products or services they seek?
- what specific solutions do they seek from the marketplace?
- from which supplier(s) do they purchase those products or services now?
- how many competitive suppliers are there in this ecosystem, industry sector/segment?
- what are their fears if they can not find solutions to their problems?
- what benefits do they perceived as valued?
- where do they go to learn about products and services?
-and.....more





Do You Really ?

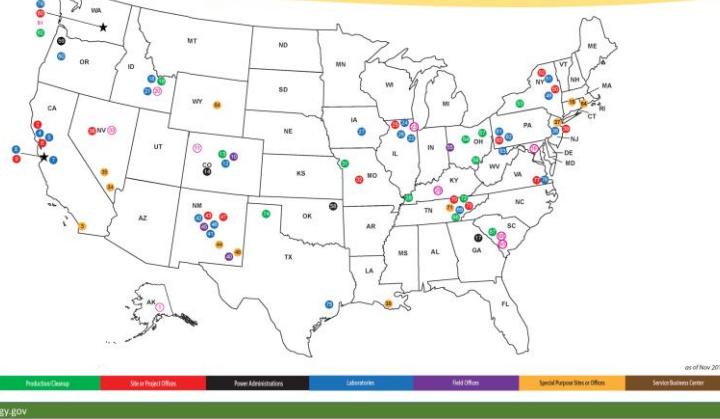
KNOW YOUR

**Government
Customer**





DOE/NNSA Sites



Illustrative Only



What DOE Buys

Top 5 NAICS* Codes – Prime

- 562910 – Remediation Services
- 541611 – Administrative Management and General Management Consulting Services
- 541330 – Engineering Services
- 561210 – Facilities Support Services
- 541513 – Computer Facilities Management Services

Top 5 NAICS Codes – Subcontracting

- 541330 – Engineering Services
- 541990 – Professional Services
- 541715 – Research and Development in the Physical, Engineering, and Life Sciences
- 562910 – Remediation Services
- 611710 – Educational Services

* North American Industry Classification System Codes



Acquisition Forecast Opportunities

DOE Headquarters and Federal Field Office Acquisition Forecast
<https://www.energy.gov/osdbu/acquisition-forecast>

- ❖ Provides list of headquarter **prime** forecast opportunities
- ❖ Provide hyperlinks to the various DOE laboratories for **subcontracting** opportunities. (*You must search each lab individually for its opportunities.*)
- ❖ Supply Chain Management Center (SCMC):
<https://thescmcgroup.com/>

<http://smallbusiness.energy.gov>

Acquisition Forecast
Office of Small and Disadvantaged Business Utilization

The U.S. Department of Energy's (DOE) Acquisition Forecast contains a list of upcoming contracting and subcontracting opportunities to help make it easier for small businesses to search for opportunities and navigate the Department's complex procurement environment.

Approximately 80% of DOE's annual procurement base is allocated to the Agency's Management and Operating Contractors (M&Os), also commonly referred to as Facility Management Contractors (FMCs).

The procurement opportunities include:

DOE HEADQUARTERS AND FEDERAL FIELD OFFICE ACQUISITION FORECAST
Search the DOE Headquarters and Federal Field Office Acquisition Forecast for direct procurements with DOE to support DOE Headquarters and DOE Federal Field Offices.

DOE/NATIONAL NUCLEAR SECURITY ADMINISTRATION (NNSA) SITE FACILITY MANAGEMENT CONTRACTS
Explore the list below of National Laboratories/M&Os/FMC procurements at DOE/NNSA contractor-managed sites:

- Ames Research Laboratory (AMES)
- Argonne National Laboratory (ANL)
- Bonneville Power Administration (BPA)
- Brookhaven National Laboratory (BNL)
- Carlsbad Field Office
- Central Plateau Clean-up Contract
- East Tennessee Technology Park (ETTP) (OR)
- Environmental Management Consolidated Business Center (EMCBC)
- Fermi National Accelerator Laboratory (FNAL)
- Hanford Mission Essential Services Contract
- Idaho Clean-up Core Contract (Fluor)
- Idaho Clean-up Contract (Idaho Environmental Coalition)
- Idaho Environmental Coalition



Do You Really

**KNOW YOUR
CUSTOMER**



Market Size ?

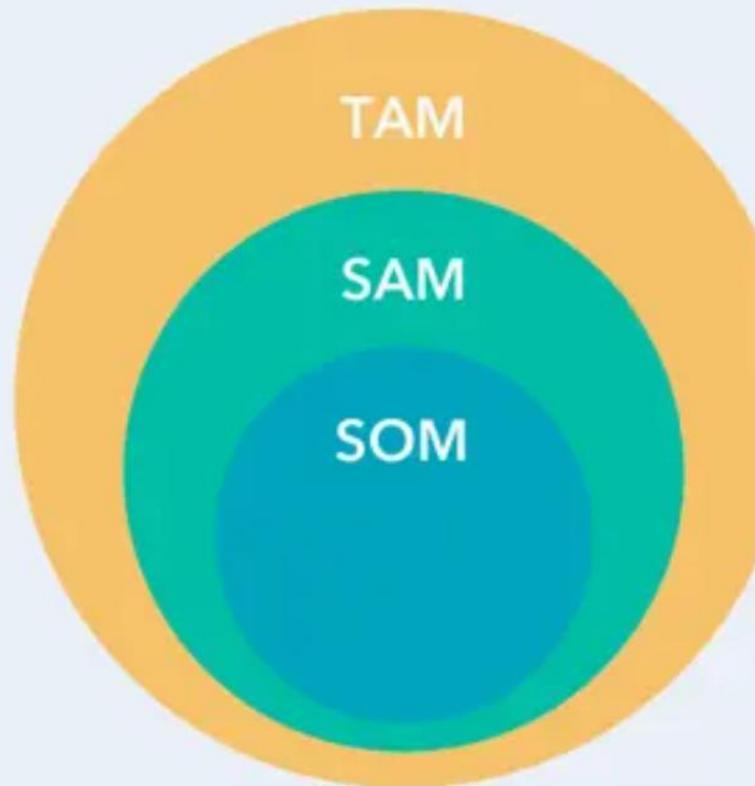
TAM SAM SOM

Total Addressable Market

Total market for your product.

Serviceable Obtainable Market

Percentage of SAM you can realistically capture.



Serviceable Available Market

Portion of the market you can acquire based on your business model (your targets).



Do you know the “TAM, SAM, SOM for the business EcoSystem you are operating in?

[TAM SAM SOM: What Do They Mean & How Do You Calculate Them? \(hubspot.com\)](https://www.hubspot.com)



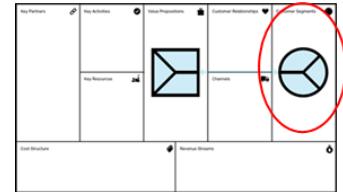
Do You Really

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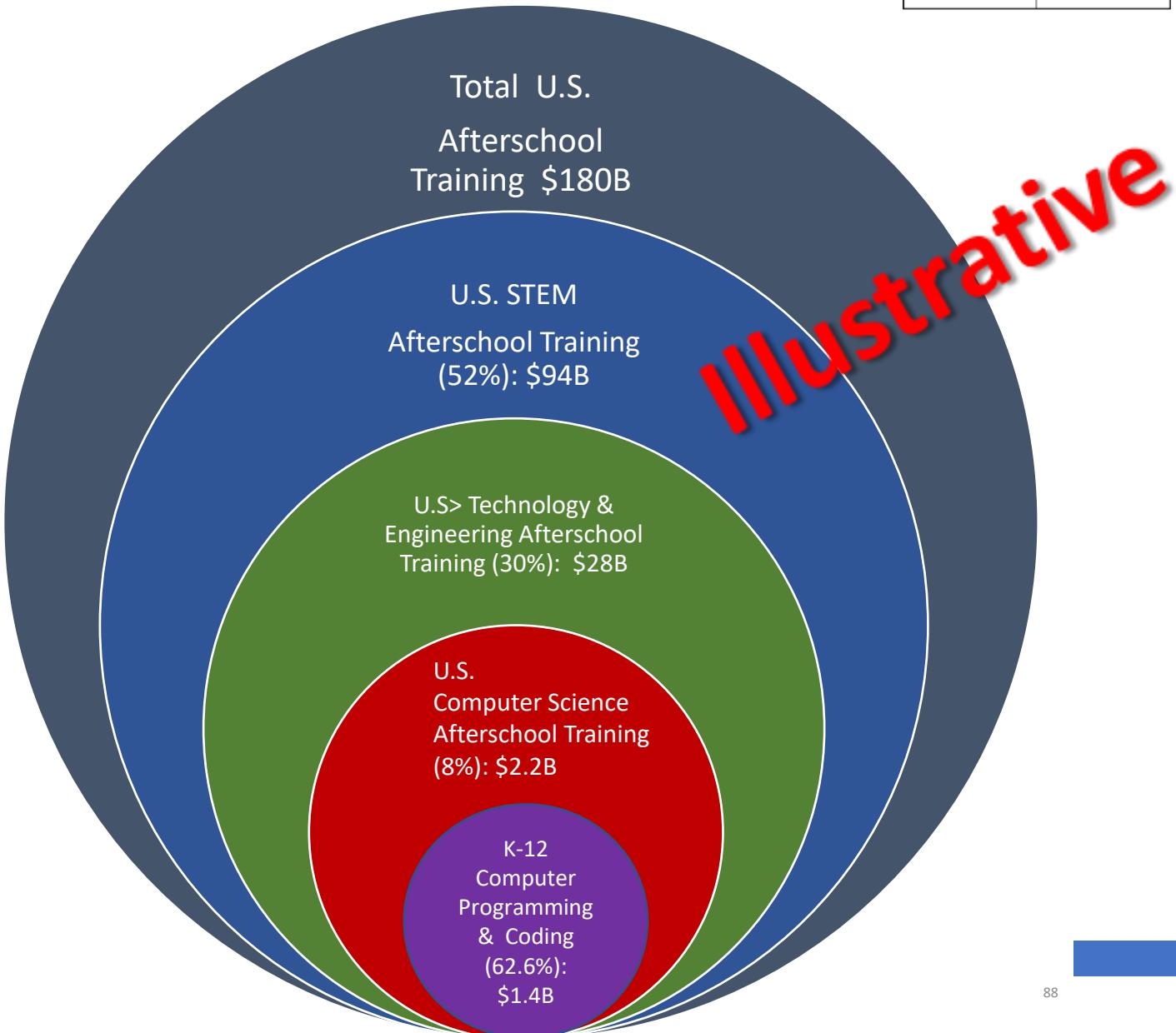


Segmentation ?

Customer Segmentation for An Afterschool Learning Company focused on Computer Coding



- *Students demand for afterschool training is about 30M growing 14% Year on Year*
- **10.2 million of students K-12** participate in afterschool programs
- *19.4 million of students K-12 not currently in an afterschool program would be enrolled in a program if one was available to them*
- **Parents pay an average of an average of ~ \$450 per month** on afterschool programs
- Typical afterschool program serves an **area of about 250,000 residents**



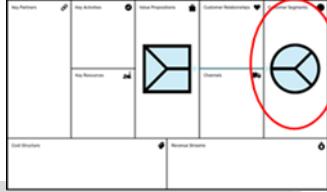


Do You Really

**KNOW YOUR
CUSTOMER**

Persona?





The BMC/VPD suggests you develop a customer “Persona”

Demographics

Profile:

- 45 years old, male
- Oversees entire fleet operation
- 10-15 years experience in transportation industry; started as a driver
- Lives and works in a suburban location (along a trucking route) in the Midwest
- Considers trucking a lifetime career
- Has both technical expertise and project management skills
- Strong passion for his business - likes to be a part of legacy/history
- Grew with the company- worked his way up to manager

Company Profile:

- Small/Medium Size Fleet between 100 and 200 units
- Uses multiple brands of OEMs for trucks; has direct relationships with OEMs across categories



Daniel
Heavy Duty Fleet Maintenance Manager
USA



Behaviors & Attitudes

- Highly loyal in all aspects of his job; generally reluctant to change
- Driven by data when making important decisions
- Open to new technology and willing to try new things as long as others have seen proved benefits
- Treats other employees like family
- Very active on social platforms (e.g. LinkedIn), sharing information and seeking advice
- Reads or subscribes to industry publications to better understand new trends
- Has a strong local network of industry peers
- Eager to learn from larger fleets
- Likely to solely source motor oil from one supplier

Needs

- To maximize up time for vehicles in his fleet
- To maintain fleet efficiency by managing metrics like fuel economy and total cost of ownership
- To evaluate all key factors in maintaining vehicle efficiency (e.g. coolants, filters)
- To closely monitor the condition of his trucks
- To see value in any increased cost of supply
- Qualified and informed drivers to handle equipment properly
- Access to research conducted by the manufacturers for proof of product performance
- Strategic relationships with service center hubs
- Education on implications of regulatory changes (e.g. PC-11)

Illustrative only

Do You Really **KNOW YOUR COMPETITORS**



How does your customer solve the problem today?

What are the alternatives? Substitutes, Solutions? Incumbent Suppliers / providers ?

Exactly who are your direct and indirect competitors?

What are their strengths and weaknesses ?
What are the “gaps” in their market offering and value proposition ?

What is their secret sauce/points of differentiation?

What insights can you obtain from understanding this ecosystem?



Find Gaps Compare Best in Class Competitors' Websites



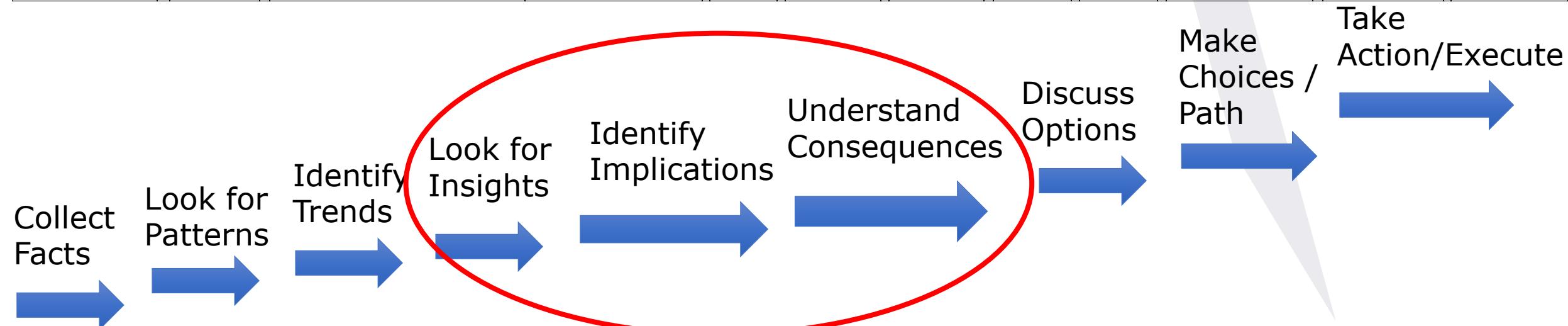


Competitive Comparative Matrix Insights Exercise Template

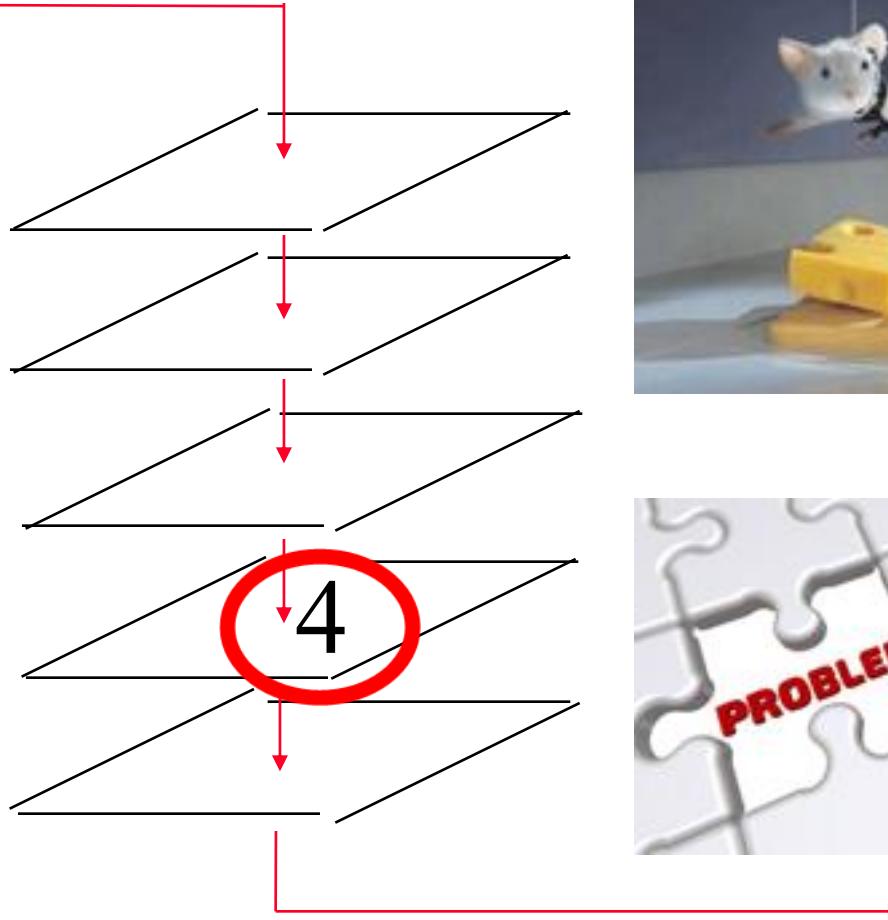
NOTE: Create in Excel; minimum of 5 competitors; modify columns as applicable

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



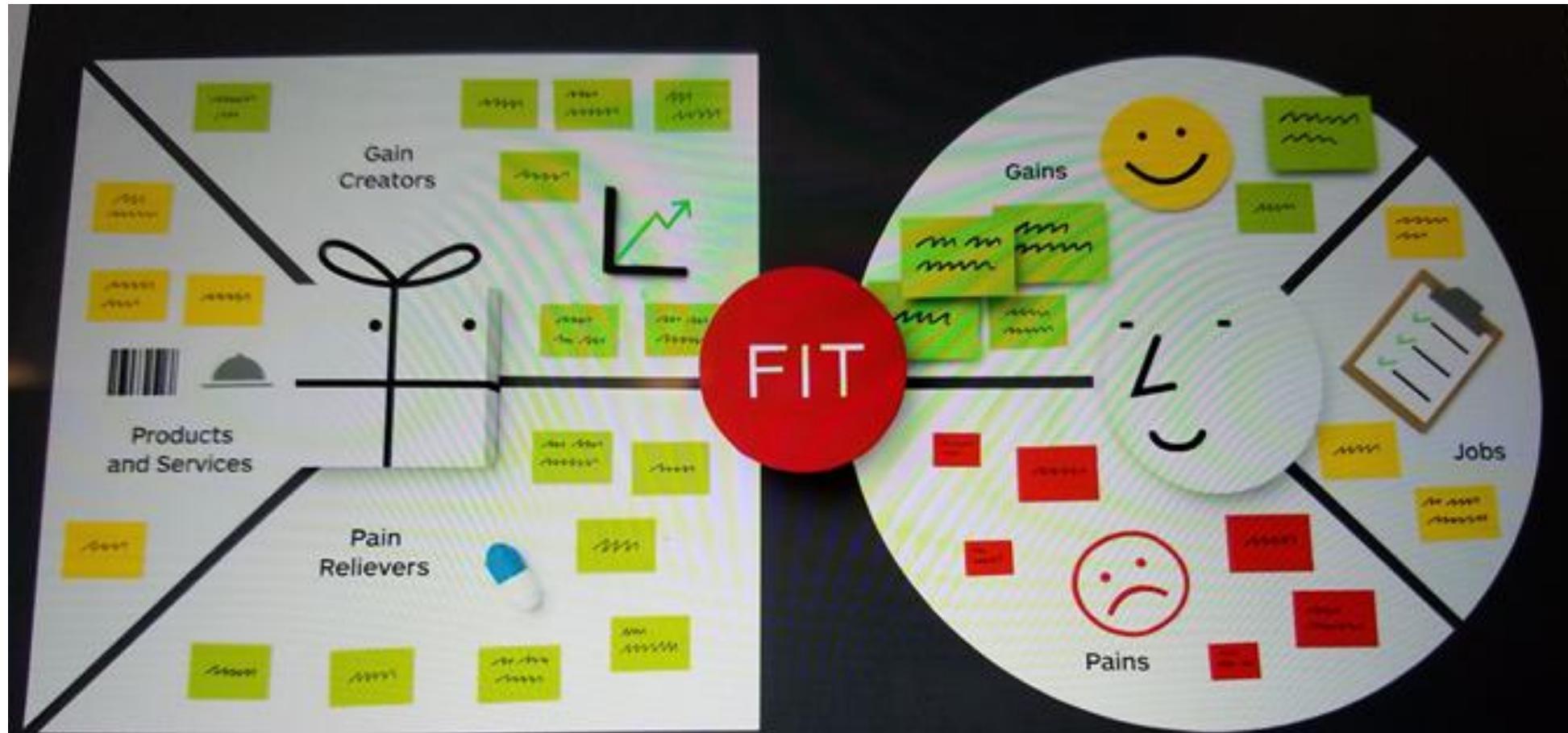
We can *describe the problem we are solving*, and *how our unique, differentiated and novel solution, vs. competition, works to create benefits* for a specific group of *clients and customers*



What (Specific) Problem are you solving for whom ?

Your Value Proposition (products/services)

Given the specific “problem/job” what “pain points” do you remove ? What are the benefits ? Would they pay you ?





Do You Really **KNOW YOUR**

Points of Differentiation?

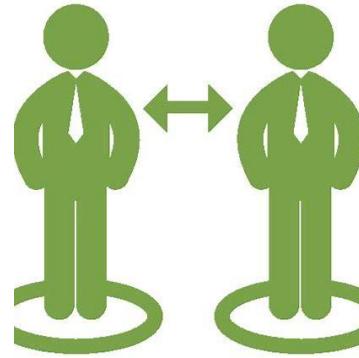
Strategic Advantage?

Your Secret Sauce?

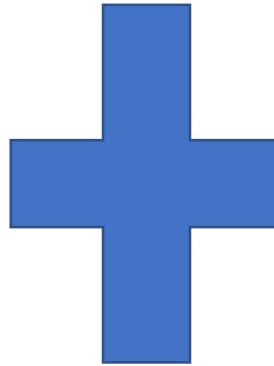
?



Value Proposition Design asks you to think about this equation:



Your Service / Product Points of Parity



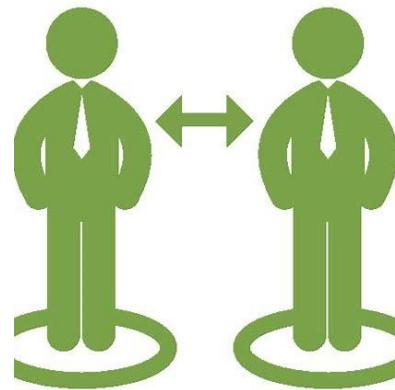
*Your Service / Product / Business
Points of Differentiation*

(communicated with clarity), equals...

...some level of tangible value created in the Mind of your Customers

Q: How can your businesses' perceived market value optimized?

The Value Proposition Design asks how are you the same as competition ?:



Typical Points of Parity

- Strict Compliance with all Requirements
- Cost Competitiveness; Priced Competitively
- Technical Capability
- Financially Sound
- Prior Experience with Customer is favorable
- Seen as “Easy to do business with”
- Favorable reviews

The Value Proposition Design asks:

"How (specifically and measurably) is your product or service capabilities / offering, better than the next best available (or incumbent) alternative?"

Typical and Potential Points of Differentiation

- Company/Brand is seen as Strategic, Innovative
 - Leader, among the best
- Product / Service is:
 - low risk, high convenience, environmentally friendly, simple to use
- Strategic Mission aligns well with client
 - Shared values, attributes, outlooks
- Management Team is credible, believable
- Organization has capacity, competency
- Offering Benefits are tangible, quantifiable
- Brand is Professional with market presence

