

## 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.

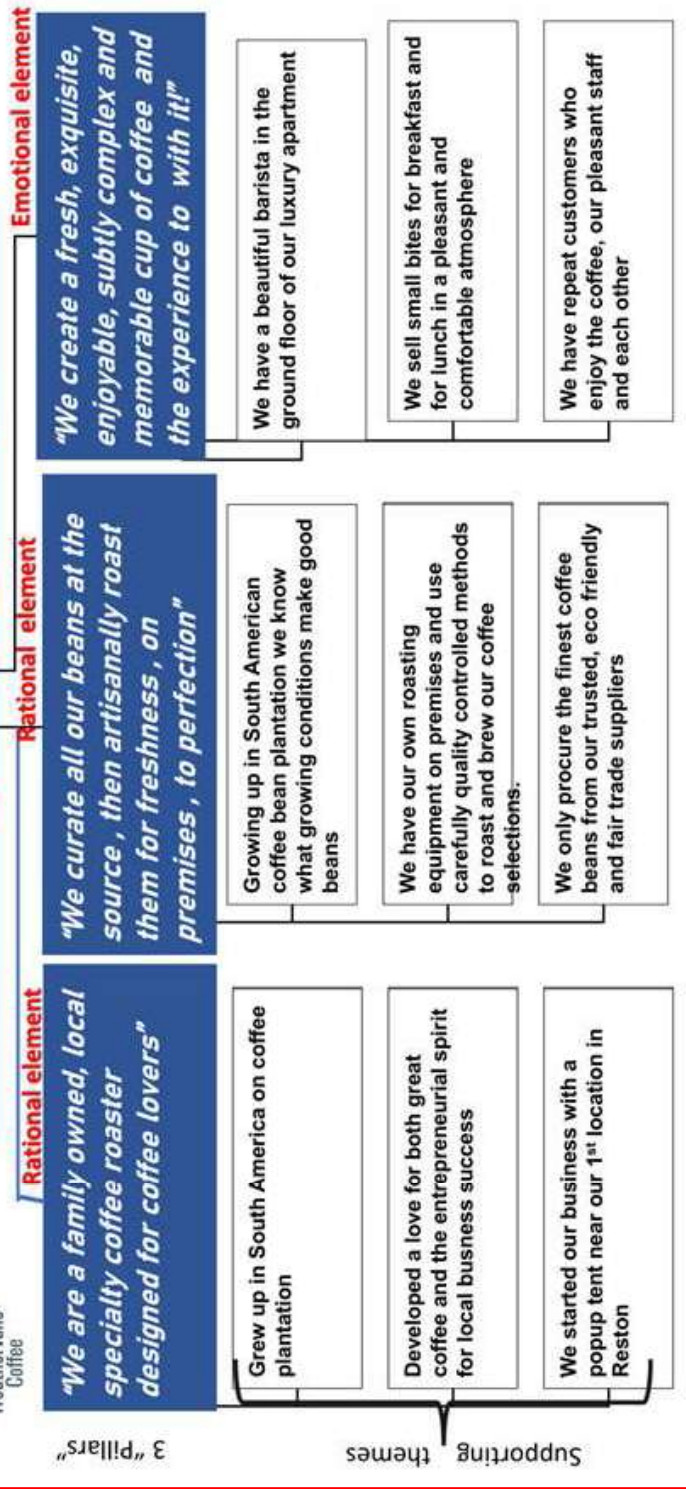
From there, the sales team is responsible for converting customers in the pipeline to generate revenue.



# Step # 15 Points of Emphasis



## Weathervane Coffee Message Mapping Example



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.

The screenshot shows a website with a navigation bar containing 'Web hosting', 'WordPress', and 'Email Marketing'. The main content area features a 'Web Hosting Built for Your Success' section with a woman holding a laptop and a '3,000,000 Domains Thrive on SteeGround' badge. Below this is a 'Web Hosting Built for Your Success' section with a 'START NOW' button. The footer area includes 'Avada | Website Builder For WordPress & eCommerce' with a 'Regular License' badge and a '69' price tag. A red circle highlights the 'SiteGround' logo in the navigation bar, and a red arrow points from the text above to the 'Avada' logo.

This 'Typical' Entrepreneurial Journey Map Features: 'Typical' Roadmap, 4 Broad 'Themes', 24 Work Blocks or 'Action' Elements, Self-Assessment 'Proficiency Rating'.

WEBSITE DESIGN & CONTENT

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

# Step # 15 Points of Emphasis

**BUSINESS MARKETING CAMPAIGN**

**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

**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

Features Pricing FAQ

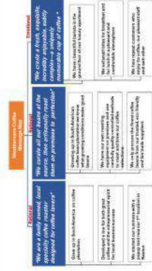
Get started

This "Typical" Entrepreneurial Journey Map Features:

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

Consider using an "Ai" platform like CLAUDE (the paid version) to aid in finding relevant key words and helping to create your digital Marketing content 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



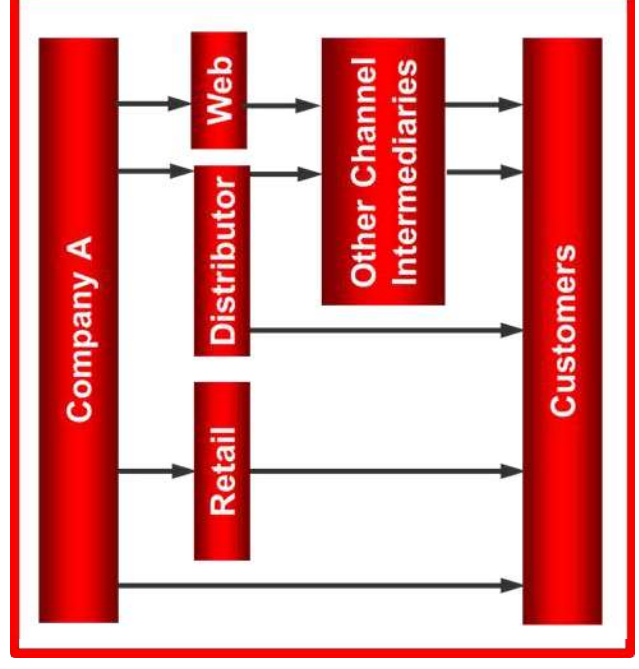
Strategic Marketing Execution Plan Summary for 2H2022

Tactics / Category	Jul	Aug	Sep	Oct	Nov	Dec
<b>Press Releases:</b> <ul style="list-style-type: none"> <li>soft launch</li> <li>hard launch</li> <li>major events</li> <li>webinars</li> <li>newsmaterials</li> <li>byline articles</li> <li>other</li> </ul>				Post to FB		
<b>Major Events</b> <ul style="list-style-type: none"> <li>TradeShows</li> <li>Conferences</li> <li>Speaking Ops</li> <li>Networking</li> </ul>						
<b>Digital Footprint</b> <ul style="list-style-type: none"> <li>Website                             <ul style="list-style-type: none"> <li>seo</li> <li>analytics</li> <li>ux</li> </ul> </li> <li>Facebook</li> <li>Ads</li> <li>Instagram</li> <li>Blog</li> <li>Pod</li> <li>Other</li> </ul>		Video Blog on website				
<b>Collateral Materials</b> <ul style="list-style-type: none"> <li>Brochures</li> <li>Posters</li> <li>Business</li> </ul>						
<b>Sales Development</b> <ul style="list-style-type: none"> <li>Lead Generation</li> <li>Email push</li> <li>other</li> </ul>			1st Email Drip		2nd Email Drip	

ILLUSTRATIVE ONLY

## Step # 16 Points of Emphasis

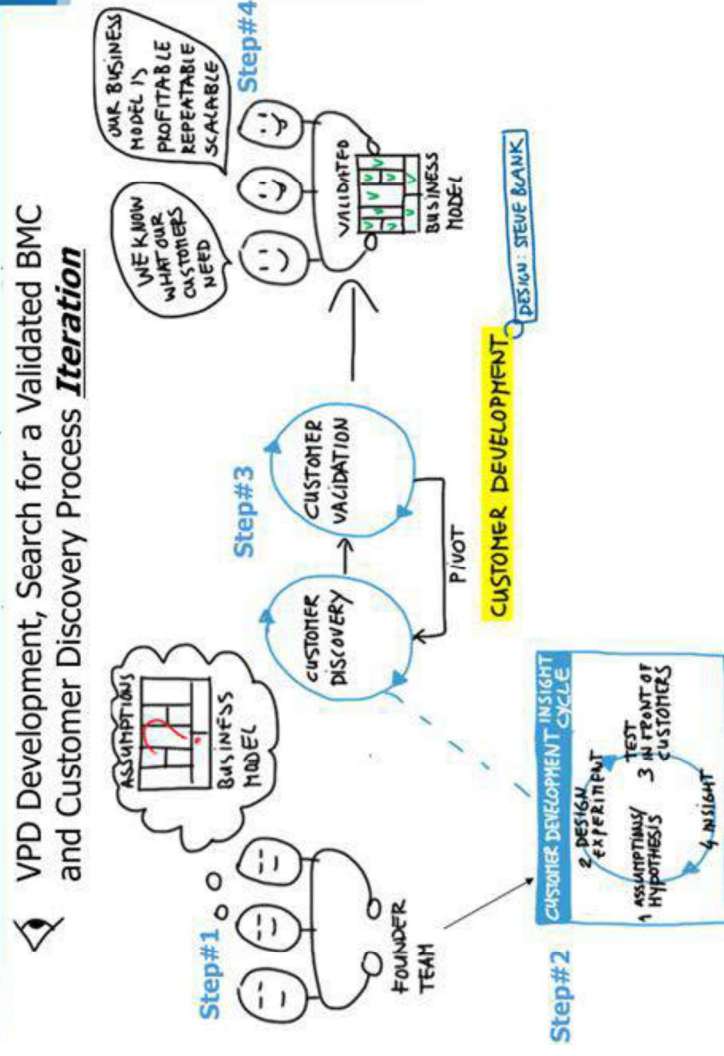
Referencing the Targeted Intended Customer / segment from the VPD, optimize/choose the most relevant Channel / pathway To Market



## Step # 17 Points of Emphasis

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

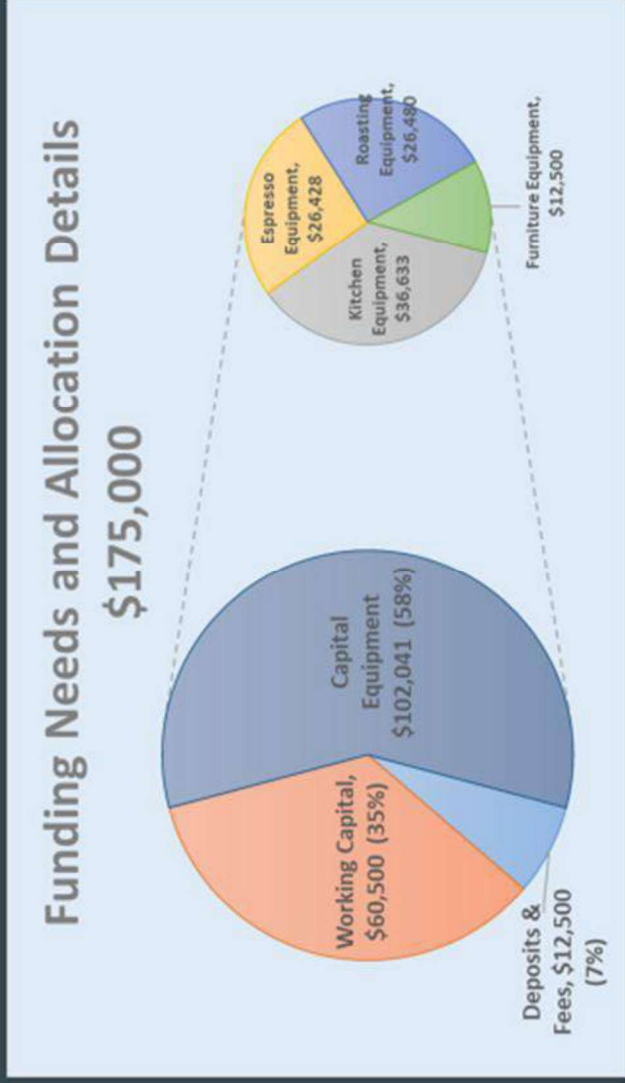
- Pitch
- Narrative,
- Financials





# Step # 18 Points of Emphasis

## Our Funding Ask



How would you spend that capital.

Prepare these docs:

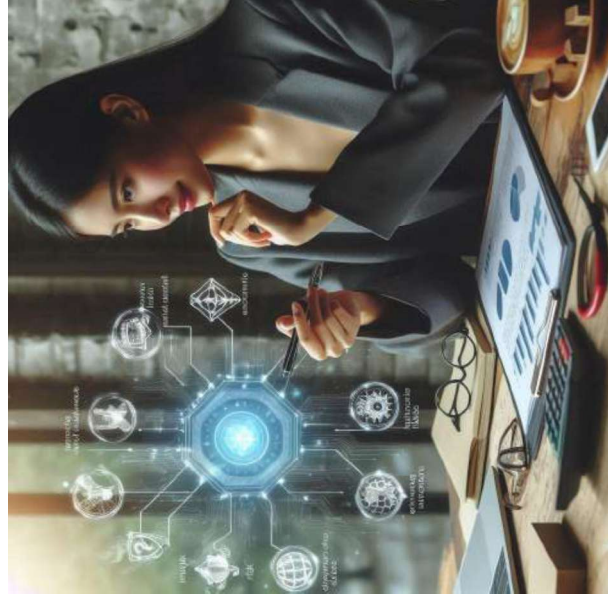
- 2 Years - Business & Personal Tax Returns
- Detailed Financial Statements
- 2 Yr Cash Flow Forecast (Excel version)
- Personal Financial Statement
- Business Brochure/Capability Statement
- Operating Agreement
- Other as requested

## Step # 19 Points of Emphasis

**Identify 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

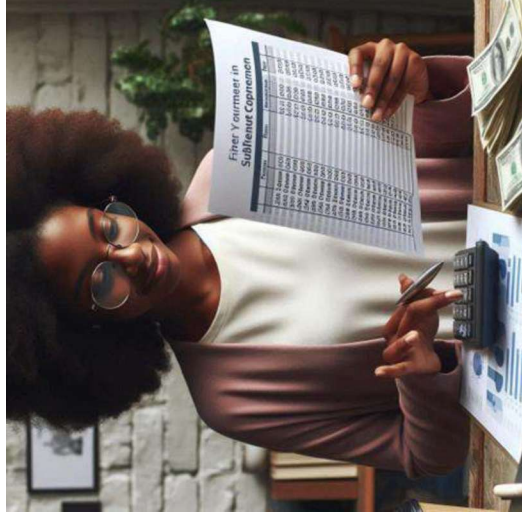


## Step # 20 Points of Emphasis

**Ensure / Assess that your financials (cash flow, P&L, etc., will support the hiring of an intern or a fractional / part time / full time employee to help grow the business.**

**Define the role of that new employee.**

**Ask...who is doing the selling for your business?**



# Consider attending

# MSBDC "How To" Webinars Associated with Phase 3

**1** Develop the Vision / Find a Mentor

Proficiency: 1 2 3 4 5

**2** Crystallize your Hypothesis using the BMC / Value Proposition Design

Proficiency: 1 2 3 4 5

**3** Conduct Customer Segmentation / Identify the persona of your early adopter intended targeted customers / sub segments

Proficiency: 1 2 3 4 5

**4** Draft your Minimal Viable Product or Service that you intend to offer/sell to the marketplace

Proficiency: 1 2 3 4 5

**5** Establish a domain name then consider creating a legal entity

Proficiency: 1 2 3 4 5

**6** Think through your Go to Market approach, B2B, B2C, B2G then map the stakeholder ecosystem, partner types and content, register with SAM.gov if applicable

Proficiency: 1 2 3 4 5

**7** Identify the first 10 intended targeted customers / early adopters by NAICS codes, title, name, POC for discovery, and sales

Proficiency: 1 2 3 4 5

**8** Establish the sales structure you will use; identify required retail space, warehouse, manufacturing, office space, if relevant

Proficiency: 1 2 3 4 5

**24** Prepare for growth, hyper growth, scaling and exit by organizing the sale of the business: business plan; plan for sale, or exit

Proficiency: 1 2 3 4 5

**25** 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

**26** Begin using the structure, approach, frequency of stewardship and key frequency using the metrics that matter; make business course corrections based on data insights

Proficiency: 1 2 3 4 5

**27** Develop Business Imperatives for a two year outlook; develop a suite of the lowest correct, simple metrics, conduct stewardship and reporting on regular progress.

Proficiency: 1 2 3 4 5

[Workshops & Events - Mason SBDC](#)

*Anatomy of a Typical 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*

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

**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 1<sup>st</sup> draft of year 1 revenue projections by month using projected pricing

Proficiency: 1 2 3 4 5

**28** Consider venture growth staffing needs; internships, training, onboarding; prioritize staffing for growth, i.e. business development, operations, etc.

Proficiency: 1 2 3 4 5

**18** Identify, assess 5 elements of business risk and build risk mitigation steps for each as relevant; update pitch

Proficiency: 1 2 3 4 5

**14** Determine need for access to capital, funding, and how it would be spent; explore grants if appropriate; reflect any loan repayment in cash flow; re 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; create content calendar 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

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

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

# Referencing leg 3 of the “map”, lets pause for Questions and Discussion!





# "Typical" Small Business Entrepreneurial Journey

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 Proficiency: 1 2 3 4 5

**5** Establish a domain name then consider creating a legal entity  
 Proficiency: 1 2 3 4 5

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**25** Develop Business Imperatives for a two year outlook; develop a suite of the lowest correct, simple metrics, conduct stewardship and reporting on regular intervals 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

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

## Strategic Imperatives, Metrics, Cybersecurity

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

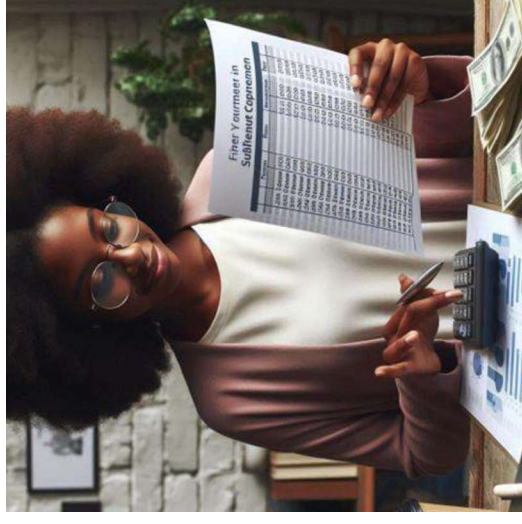
## Developing the Business

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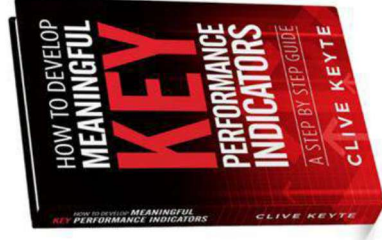
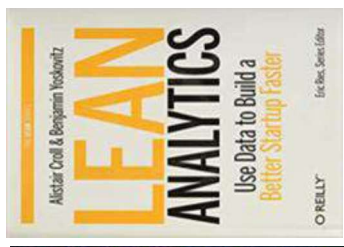
# Step # 21 Points of Emphasis

**Illustrative Only**

Develop Strategic Imperatives for a 2-year time horizon then identify metrics to measure progress



Our Leadership Team will start reporting progress in (June 2025) and will do so on a (monthly) basis using a simple traffic light (other) format



# XYZ Company

## Strategic Imperatives & Balanced Scorecard

2025-2027 Strategic Planning Framework

AI-Powered Special Education Platform

- Strategic Framework Highlights:
  - 2-year Time Horizon
  - Metrics across all 4 Dimensions
  - Lead, Lag, Milestone Metrics

CORE VALUES & VISION	STRATEGIC IMPERATIVES (2-Year Goals)	PERFORMANCE METRICS (4 Key Themes)
<p><b>Our Core Values</b> XYZ operations and leadership are guided by four principles:</p> <ol style="list-style-type: none"><li>1. <b>Children First</b> – Every decision prioritizes child outcomes</li><li>2. <b>Accessible to All</b> – Multilingual, culturally aware tools</li><li>3. <b>Science-Backed</b> – Real research drives improvement</li><li>4. <b>True Partnership</b> – Parents, teachers, therapists as collaborators</li></ol> <p><b>Our Vision</b> <i>To become the most trusted special education platform in the world – ensuring every child with autism, dyslexia, ADHD, or learning delays has tools to succeed.</i></p>	<p><b>5 Strategic Imperatives</b></p> <ol style="list-style-type: none"><li>1. Expand into GCC, North Africa, and U.S. school districts</li><li>2. Achieve \$50K MRR from schools, centers, and families</li><li>3. Drive 90% teacher and 80% parent monthly engagement</li><li>4. Launch EZread 2.0, enhanced ABA tools, and smart course planner</li><li>5. Build a lean, high-performing team with scalable onboarding</li></ol>	<p><b>1. Financial Metrics</b></p> <ul style="list-style-type: none"><li>• <b>LEAD:</b> New leads/month, Demo-to-pilot conversion rate (%)</li><li>• <b>LAG:</b> Monthly Recurring Revenue (\$USD), CAC ratio</li><li>• <b>MILESTONE:</b> 10 pilots by Jun 2026   \$50K MRR by Dec 2027</li></ul> <p><b>2. Customer Experience Metrics</b></p> <ul style="list-style-type: none"><li>• <b>LEAD:</b> Onboarding time (days), Support response time (hrs)</li><li>• <b>LAG:</b> NPS score, Customer satisfaction (target 4.7/5)</li><li>• <b>MILESTONE:</b> Parent Portal 2.0 launch by Q2 2026</li></ul> <p><b>3. Internal / Process Metrics</b></p> <ul style="list-style-type: none"><li>• <b>LEAD:</b> Release frequency (#/quarter), Marketing ROI (%)</li><li>• <b>LAG:</b> Platform uptime (%), Bug resolution time</li><li>• <b>MILESTONE:</b> Internal dashboard by Jun 2026   Auto-onboarding 2027</li></ul> <p><b>4. Team &amp; Culture Metrics</b></p> <ul style="list-style-type: none"><li>• <b>LEAD:</b> Training hours/employee, Ideas submitted (#)</li><li>• <b>LAG:</b> Team retention rate (%), Employee satisfaction</li><li>• <b>MILESTONE:</b> Key hires complete by 2026   Innovation program 2027</li></ul>

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<p><b>Our Core Values</b> XYZ operations and leadership are guided by four principles:</p> <ol style="list-style-type: none"><li><b>Children First</b> – Every decision prioritizes child outcomes</li><li><b>Accessible to All</b> – Multilingual, culturally aware tools</li><li><b>Science-Backed</b> – Real research drives improvement</li><li><b>True Partnership</b> – Parents, teachers, therapists as collaborators</li></ol> <p><b>Our Vision</b> <i>To become the most trusted special education platform in the world – ensuring every child with autism, dyslexia, ADHD, or learning delays has tools to succeed.</i></p>	<p><b>5 Strategic Imperatives</b></p> <ol style="list-style-type: none"><li>Expand into GCC, North Africa, and U.S. school districts</li><li>Achieve \$50K MRR from schools, centers, and families</li><li>Drive 90% teacher and 80% parent monthly engagement</li><li>Launch EZread 2.0, enhanced ABA tools, and smart course planner</li><li>Build a lean, high-performing team with scalable onboarding</li></ol>	<p><b>1. Financial Metrics</b></p> <ul style="list-style-type: none"><li><b>LEAD:</b> New leads/month, Demo-to-pilot conversion rate (%)</li><li><b>LAG:</b> Monthly Recurring Revenue (\$USD), CAC ratio</li><li><b>MILESTONE:</b> 10 pilots by Jun 2026   \$50K MRR by Dec 2027</li></ul> <p><b>2. Customer Experience Metrics</b></p> <ul style="list-style-type: none"><li><b>LEAD:</b> Onboarding time (days), Support response time (hrs)</li><li><b>LAG:</b> NPS score, Customer satisfaction (target 4.7/5)</li><li><b>MILESTONE:</b> Parent Portal 2.0 launch by Q2 2026</li></ul> <p><b>3. Internal / Process Metrics</b></p> <ul style="list-style-type: none"><li><b>LEAD:</b> Release frequency (#/quarter), Marketing ROI (%)</li><li><b>LAG:</b> Platform uptime (%), Bug resolution time</li><li><b>MILESTONE:</b> Internal dashboard by Jun 2026   Auto-onboarding 2027</li></ul> <p><b>4. Team &amp; Culture Metrics</b></p> <ul style="list-style-type: none"><li><b>LEAD:</b> Training hours/employee, Ideas submitted (#)</li><li><b>LAG:</b> Team retention rate (%), Employee satisfaction</li><li><b>MILESTONE:</b> Key hires complete by 2026   Innovation program 2027</li></ul>

# XYZ Company

## Strategic Imperatives & Balanced Scorecard

2025-2027 Strategic Planning Framework

AI-Powered Special Education Platform

CORE VALUES & VISION	STRATEGIC IMPERATIVES (2-Year Goals)	PERFORMANCE METRICS (4 Key Themes)
<p><b>Our Core Values</b> XYZ operations and leadership are guided by four principles:</p> <ol style="list-style-type: none"> <li><b>Children First</b> – Every decision prioritizes child outcomes</li> <li><b>Accessible to All</b> – Multilingual, culturally aware tools</li> <li><b>Science-Backed</b> – Real research drives improvement</li> <li><b>True Partnership</b> – Parents, teachers, therapists as collaborators</li> </ol> <p><b>Our Vision</b> <i>To become the most trusted special education platform in the world – ensuring every child with autism, dyslexia, ADHD, or learning delays has tools to succeed.</i></p>	<p><b>5 Strategic Imperatives</b></p> <ol style="list-style-type: none"> <li>Expand into GCC, North Africa, and U.S. school districts</li> <li>Achieve \$50K MRR from schools, centers, and families</li> <li>Drive 90% teacher and 80% parent monthly engagement</li> <li>Launch EZread 2.0, enhanced ABA tools, and smart course planner</li> <li>Build a lean, high-performing team with scalable onboarding</li> </ol>	<p><b>1. Financial Metrics</b></p> <ul style="list-style-type: none"> <li><b>LEAD:</b> New leads/month, Demo-to-pilot conversion rate (%)</li> <li><b>LAG:</b> Monthly Recurring Revenue (\$USD), CAC ratio</li> <li><b>MILESTONE:</b> 10 pilots by Jun 2026   \$50K MRR by Dec 2027</li> </ul> <p><b>2. Customer Experience Metrics</b></p> <ul style="list-style-type: none"> <li><b>LEAD:</b> Onboarding time (days), Support response time (hrs)</li> <li><b>LAG:</b> NPS score, Customer satisfaction (target 4.7/5)</li> <li><b>MILESTONE:</b> Parent Portal 2.0 launch by Q2 2026</li> </ul> <p><b>3. Internal / Process Metrics</b></p> <ul style="list-style-type: none"> <li><b>LEAD:</b> Release frequency (#/quarter), Marketing ROI (%)</li> <li><b>LAG:</b> Platform uptime (%), Bug resolution time</li> <li><b>MILESTONE:</b> Internal dashboard by Jun 2026   Auto-onboarding 2027</li> </ul> <p><b>4. Team &amp; Culture Metrics</b></p> <ul style="list-style-type: none"> <li><b>LEAD:</b> Training hours/employee, Ideas submitted (#)</li> <li><b>LAG:</b> Team retention rate (%), Employee satisfaction</li> <li><b>MILESTONE:</b> Key hires complete by 2026   Innovation program 2027</li> </ul>

## Strategic Framework Highlights:

- 2-year Time Horizon
- Metrics across all 4 Dimensions
- Lead, Lag, Milestone Metrics
- Commitment to begin reporting

Reporting Commitment: Leadership will begin progress reporting in Q1 2025 using a monthly traffic-light dashboard format.

### About XYZ Company

XYZ Company is an AI-powered educational technology company creating adaptive learning tools and social stories for children with autism, ADHD, dyslexia, and other special needs. Our platform serves schools, therapy centers, and families with two core product lines: XYZ (behavioral solutions including ABA tools and social stories) and EZread (reading intervention platform).

**Target Markets:** U.S. school districts seeking evidence-based special education technology solutions.

Framework: Kaplan-Norton Balanced Scorecard  
November 2024

## Step # 22 Points of Emphasis

**From the development of your Strategic Imperatives for a 2-year time horizon, develop your suite of Business Performance Indicators and Dashboard to track your performance forward**

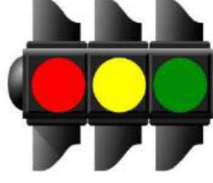
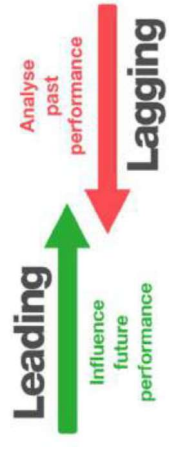
**Develop Your:**

**Metrics/Measures – 2 Year Imperatives**

**Stewardship Process**

**Reporting Format and Frequency**

**Dashboard**



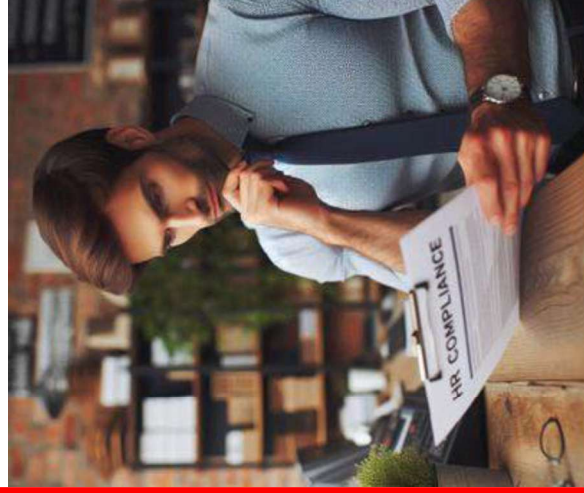
Register for the webinar:  
“Building your Business Performance Metrics/Scorecard/Dashboard”  
June 5<sup>th</sup>, 10am-noon

[Building your Business Performance Dashboard Metrics - A Step by Step Guide - \\*Live Webinar\\* - PW](#)

# Step # 23 Points of Emphasis



**Ensure business compliance in both HR and Cyber Security related areas**



HR Non-Compliance Areas
Affordable Care Act (ACA) Violations
Americans with Disabilities Act (ADA) Non-Compliance
COBRA Compliance Failures
Employee Misclassification
Equal Pay Act Violations
Family & Medical Leave Act (FMLA) Mismanagement



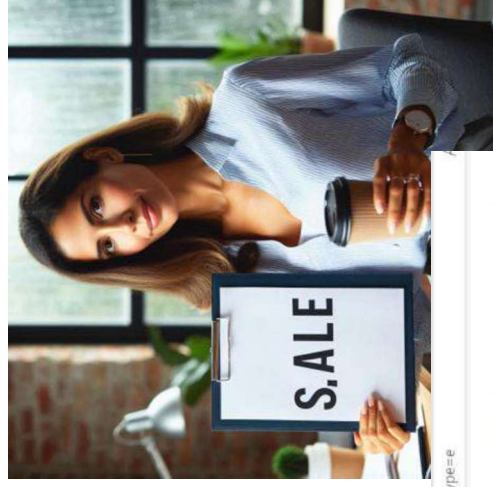
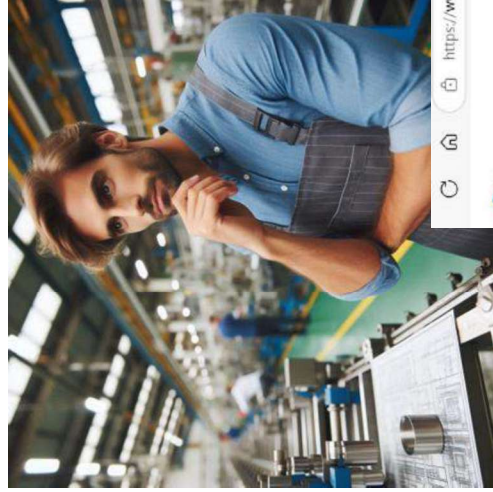
## Cybersecurity Threats

Likely to Affect

Virus	64%
Spyware	62%
Phishing	52%
Firmware Hacking	34%
IP Spoofing	32%
Ransomware	31%
Attacks on Virtualization	30%
Social Engineering	26%
Hardware-Based Attacks	26%
DDoS	24%
IoT-Based Attacks	23%
Botnets	22%
Rootkits	21%
Man in the Middle Attacks	20%
SQL Injection	18%

## Step # 24 Points of Emphasis

Consider exit/sale, scaling, growth, via expansion, acquisition



Ensure / Assess that your financials (cash flow, P&L, etc.) will support a purchase or expansion plan

# Consider attending MSBDC "How To" Webinars Associated with Phase 4

**1** Develop the Vision / Find a Mentor

Proficiency: 1 2 3 4 5

**24** Prepare for growth; hyper growth, scaling and exiting or negotiating the sale of the business; financial planning; plan 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 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 lowest correct, simple metrics, conduct stewardship and reporting on regular basis to track progress.

Proficiency: 1 2 3 4 5

**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

**2** Crystallize your Hypothesis using the BMC / Value Proposition Design

Proficiency: 1 2 3 4 5

**3** Conduct Customer Segmentation / Identify the persona of your early adopter intended targeted customers / sub segments

Proficiency: 1 2 3 4 5

**4** Draft your Minimal Viable Product or Service that you intend to offer/sell to the marketplace

Proficiency: 1 2 3 4 5

**5** Establish a domain name then consider creating a legal entity

Proficiency: 1 2 3 4 5

**6** Think through your Go to Market approach; B2B, B2C, B2G then map the stakeholder ecosystem, partner types and content, register with SAM.gov if applicable

Proficiency: 1 2 3 4 5

**7** Identify the first 10 intended targeted customers / early adopters by NAICS codes, title, name, POC for discovery, and sales

Proficiency: 1 2 3 4 5

**8** Establish the sales structure you will use; identify required retail space, warehouse, manufacturing, office space, if relevant

Proficiency: 1 2 3 4 5

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

**4** Anatomy of a Typical 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

**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 "1" draft of year 1 revenue projections by month using projected pricing

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

**14** Develop a compelling business narrative; synthesize financial projections into modular pitch suitable for multiple business purposes, i.e. sales, raising capital; iterate, refine,

Proficiency: 1 2 3 4 5

**15** Create draft marketing plan based on master branding / positioning, product / service brand current and future product/services architecture; create social media content calendar for social media content execution themes executed via editorial calendar execution plan

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

**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

**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; re build cap table if relevant; update pitch

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

**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

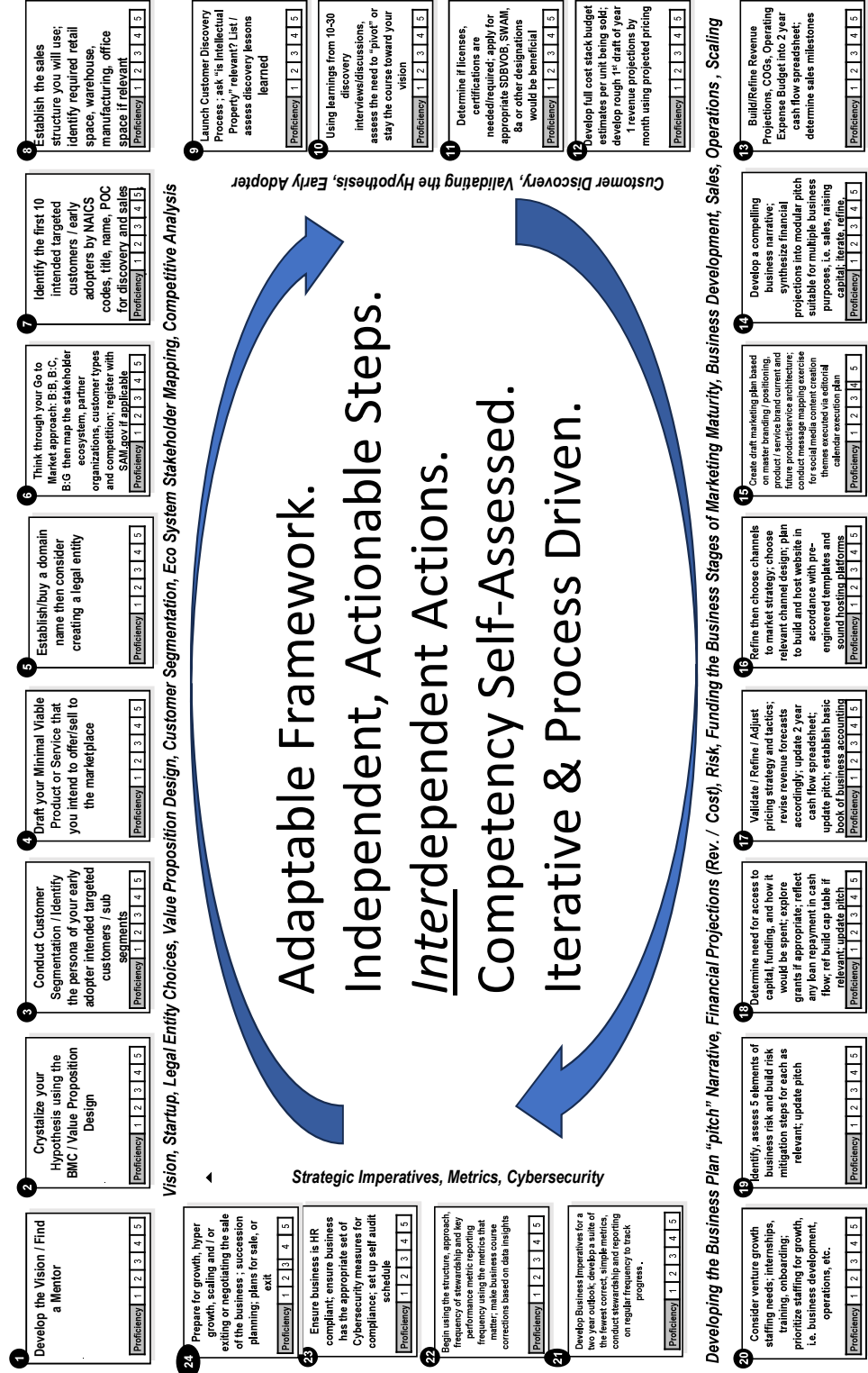
## Plan "pitch" Narrative, Financial Projections (Rev. / Cost), Risk, Funding the Business Stages of Marketing Maturity, Business Development, Sales, Operations, Scaling

[Workshops & Events -](#)  
[Mason](#)  
[SBDC](#)

# Referencing leg 4 the "map", lets pause for Questions and Discussion!



# "Typical" Small Business Entrepreneurial Journey



Customer Discovery, Validating the Hypothesis, Early Adopter

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

Adaptable Framework.  
Independent, Actionable Steps.  
Interdependent Actions.  
Competency Self-Assessed.  
Iterative & Process Driven.

Strategic Imperatives, Metrics, Cybersecurity

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



**NEVER STOP  
LEARNING**



Ideation to Discovery, along the Entrepreneurial Journey, typically happens here:

- 1 Develop the Vision / Find a Mentor  
Proficiency: 1 2 3 4 5
- 2 Crystallize your Hypothesis using the BMC / Value Proposition Design  
Proficiency: 1 2 3 4 5
- 3 Conduct Customer Segmentation / Identify the persona of your early adopter intended targeted customers / sub segments  
Proficiency: 1 2 3 4 5
- 4 Draft your Minimal Viable Product or Service that you intend to offer/sell to the marketplace  
Proficiency: 1 2 3 4 5
- 5 Establish a domain name then consider creating a legal entity  
Proficiency: 1 2 3 4 5
- 6 Think through your Go to Market approach, B.B.C.C. B.G. then map the stakeholder ecosystem, partner types and cohorts, align with SAM goal if applicable  
Proficiency: 1 2 3 4 5
- 7 Identify the first 10 intended targeted customers / early adopters by NAICS codes, title, name, POC for discovery and sales  
Proficiency: 1 2 3 4 5
- 8 Establish the sales structure you will use; identify required retail space, warehouse, manufacturing, office space, if relevant  
Proficiency: 1 2 3 4 5

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

- 24 Prepare for growth, hyper growth, scaling and exit  
Proficiency: 1 2 3 4 5
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Proficiency: 1 2 3 4 5
- 26 Begin using the structure, approach, frequency of stewardship and key frequency using the metrics that matter; make business course corrections based on data insights  
Proficiency: 1 2 3 4 5
- 27 Develop Business Imperatives for a two year outlook; develop a suite of the lowest correct, simple metrics, conduct stewardship and reporting on regular progress.  
Proficiency: 1 2 3 4 5

Strategic Imperatives, Metrics, Cybersecurity

# “Where are you on your Entrepreneurial Journey?”

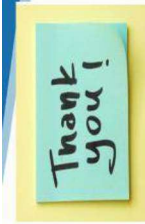
Customer Discovery, Validating the Hypothesis, Early Adopter

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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  
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- 11 Determine if licenses, certifications are needed/required; apply for appropriate SDEVOB, 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 1<sup>st</sup> 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

- 13 Consider venture growth staffing needs; internships, training, onboarding; prioritize staffing for growth, i.e. business development, operations, etc.  
Proficiency: 1 2 3 4 5
- 14 Identify, assess 5 elements of business risk and build risk mitigation steps for each as relevant; update pitch  
Proficiency: 1 2 3 4 5
- 15 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  
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- 16 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
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Proficiency: 1 2 3 4 5
- 20 Build/Refine Revenue Projections, COGs, Operating Expense Budget into 2 year cash flow spreadsheet; determine sales milestones  
Proficiency: 1 2 3 4 5

# Please know Mason SBDC is a free resource for your “Journey”



**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.masonsbdc.org](http://www.masonsbdc.org)

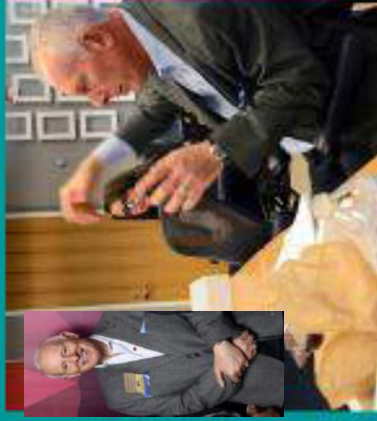
- **Resources:** <http://www.virginiasbd.org/>
- **Contacts:** [help@masonsbdc.org](mailto:help@masonsbdc.org) or (703) 261-4105
- **1:1 Counseling:** <https://clients.virginiasbdc.org/reg.aspx?mode=counsel&center=46110&subloc>
- **Workshops:** <https://masonsbdc.org/workshops/>



# Lets open the Dialog for Final Questions



## “Coaches’ Corner”



Bonus!:

*“8 Lessons Learned  
From the  
Entrepreneurial  
Journey”*



# 8 Relevant

# LESSONS LEARNED



...Hindsight from  
those  
Entrepreneurial  
Journeys

# 1. Using the power of the VPD Framework model **BEFORE**:

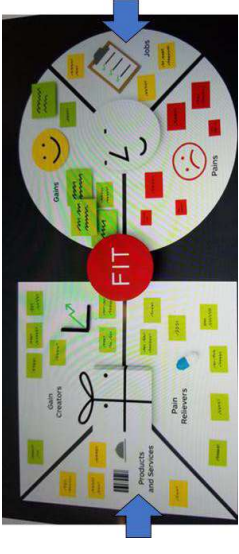
- > creating your legal entity
- > building your website
- > starting your business.



# LESSONS LEARNED

1. Using the power of the VPD Framework model **BEFORE**:
  - > creating your legal entity
  - > starting your business
  - > building a website

VPD is a best in class, practical **framework** that clearly lays out the hypothesis, rationale and **details of a path forward** that helps describe **how** organizations intend to **create**, deliver and capture **value from whom**.

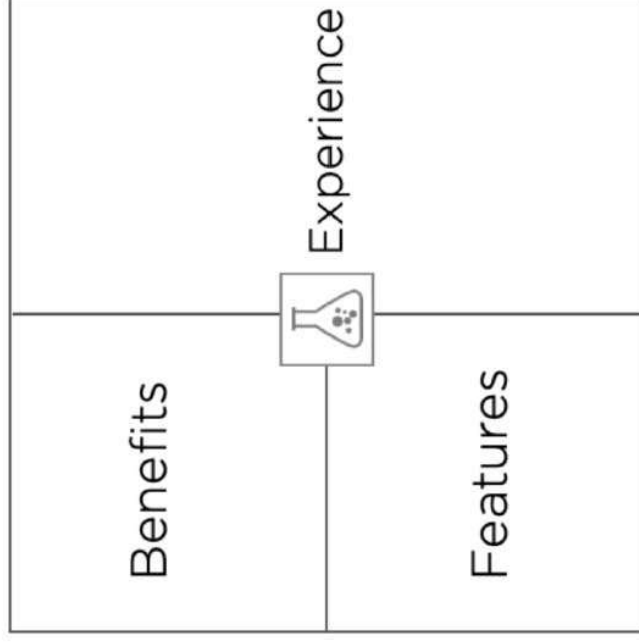


Coach/Mentor



# Value Proposition Canvas

## Product

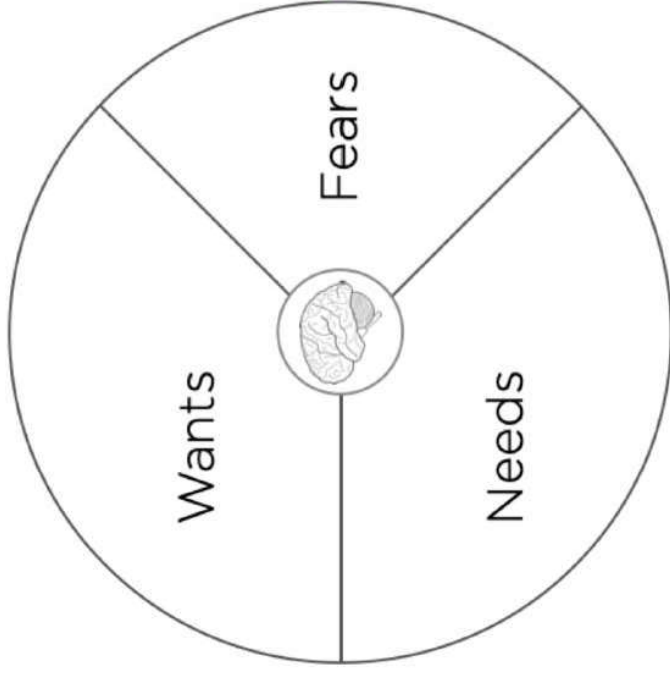


Company:

Product:

Ideal customer:

## Customer



Substitutes

The Lean Startup methodology is a testament to the startup world's innovative spirit.

The beauty of lean thinking is its emphasis on value. Traditional businesses can often become mired in processes that add little to no value for the end consumer.

**Lean Startup methodology prioritizes customer value above all else, urging businesses to strip away the superfluous and focus on what truly matters.**

**It focuses on creating products or services under conditions of extreme uncertainty. At its core lies the mantra: Build a Hypothesis, Measure, Learn.**

This iterative process emphasizes creating minimal viable products (MVPs), swift market testing, and rapid refinements based on real-world feedback.

**Source:**

7 Key Principles for Creative Strategy Development - Intrafocus

Think **“CIRCLE”** or  
intended targeted  
Customer  
Segment/Sub  
Segment

Think **“SQUARE”** or  
your product / service  
offer aligned with the  
Intended targeted  
customer needs

# Value Proposition Design



2. Knowing Who (specifically) your intended targeted Customer is?

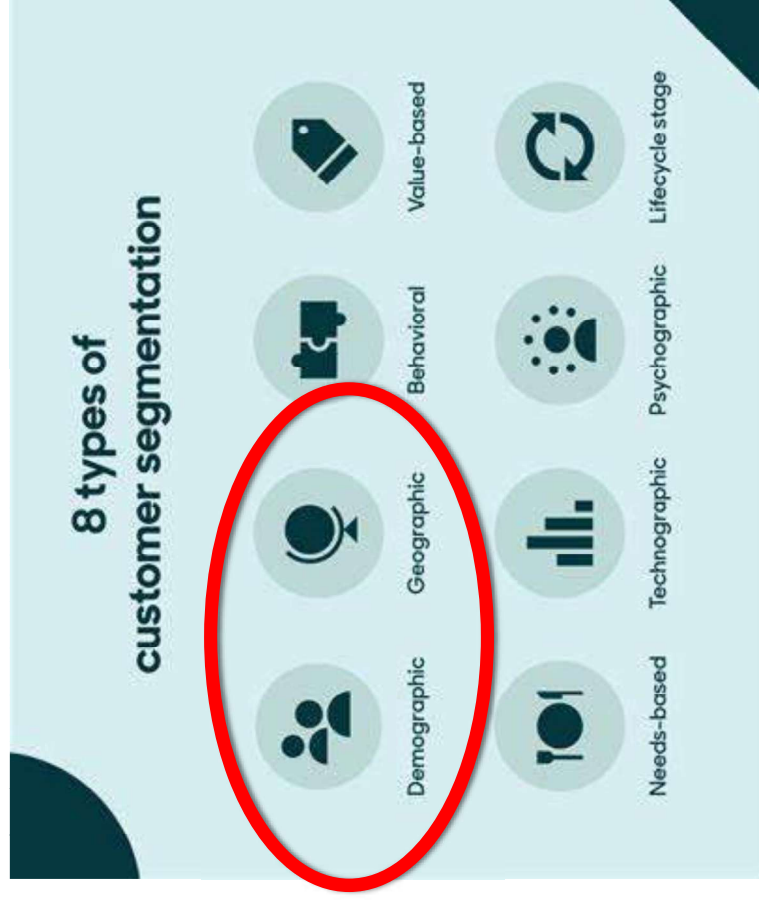


Competition

LESSONS  
LEARNED

## 2. Knowing Who (specifically) your intended targeted Customer is?

Identifying with specificity, (i.e., NAICS codes, job titles, etc.) **which customer segment(s), sub segments, customers, the initial demand** for the **early stage, MVP** product/service offer will be coming from, how do they buy...and how do we (efficiently) **find them** and **sell / market to them!**



## NOTE:

See document included in your package showing the use of “Ai” to help refine intended target customers