

# Marketing and Business Development Proposal

By Julia Abramson

## Exercise 1

The collective value drivers serve similar purposes, for both investors and founders; however, in order to effectively market the TABS Score assessment, you have to address the contrasting perspectives and weigh the authoritative positions in which your two different audiences reside in: Founders – vulnerable and the Investors - powerful. I will explain my reasoning and subsequent approach that will most effectively highlight the value drivers of the TABS Score Assessment, **illustrated in two separate infographics**. Let's begin with the founders:

**FOUNDERS:** Below is the overall narrative that our infographic needs to address. The problem that a majority of startups face and why TABS provides the solutions.

*The Problem:* As a founder for an early stage startups startup, the current growth stage does not qualify for most valuations offered. Therefore, investment pitches and current evaluations are mainly based on **projections** with minimal quantifiable evidence. Investors want numbers. The evaluation process in itself has a complex and tedious nature that most investors find to be inefficient, costly, unpredictable for early-stage startups, and well, a large turnoff. So, what's going to make you sexy? And how will you do so in a cost and time efficient manner? That's where the TABS Score™ Assessment comes in.

### *The TABS Solution:*

Our software will guide your position in the startup ecosystem with a 120-evaluation point system, providing weighted scores accounting for your Business Overview, Financials, Legal, Operational Processes, HR & Regulatory Risk, Reputational Risk, Cyber Security, and Tangible Associated Risks. The evaluation is a structure, invaluable, to the marketing of your startup. We provide fast, thorough, and reputable evaluations so you don't have to. Our job is to make you look good, and to do so with a quality valuation.

### *The Infographic:*

When we are marketing to founders, our job is to sympathize with their biggest needs, then tell them how the TABS Assessment can provide a unique solution. For them, they need to be selling themselves and it is our job to help them do that – give them a

“metrical makeover” – and show how our systematic approach to evaluation is going to **maximize their potential outlook and current successes**. The infographic will illustrate the top three most critical value drivers that makes the TABS Score Assessment worth taking: This approach keeps the visuals condense, to-the-point, and visually appealing (Potential infographic would mimic the design below)

### Value Drivers

1. **Standardization and Data Accuracy**, this is where the value of our thoroughness comes in – This chart should be directly included in the infographic and at the top/beginning



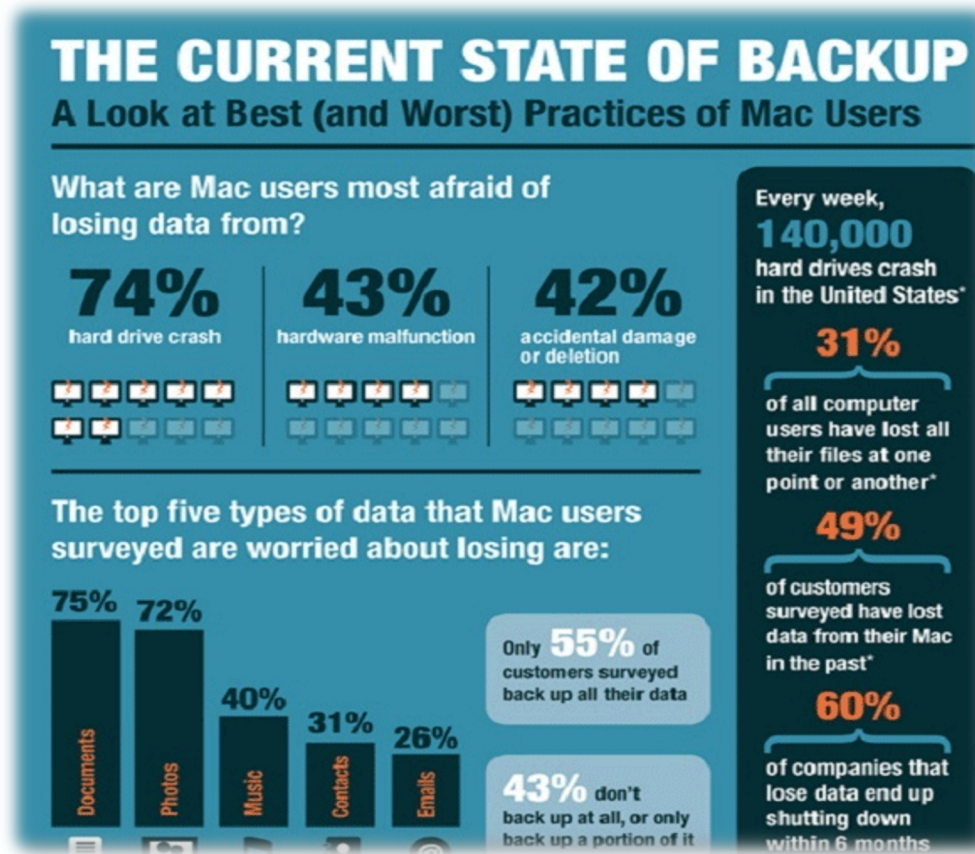
**Goal: Taking the TABS Assessment will put you – a founder – in the top 20% percentile of growing startups**

2. **Cost-Benefit analysis** for founders, comparing the costs to take the TABS Assessment vs the costs (opportunity costs included) of other evaluation methods
  - a. The middle of the infographic, following the standardization and data accuracy statistics will be the cost benefit analysis visual.
  - b. We want to follow our statistics up by emphasizing our costs, making it subtle, but simultaneously justifying why they should invest in those costs
3. **Resources** know our audience: these early-stage startups are desperate for resources that their current capital won't cover. TABS is providing **advanced software with analytical reports, a large network**, and more that a majority of early-stage startups – even later stage startups – will not have access to until it is too late to manage any risks. Additionally, **our evaluation metrics will address business and other operational risks that they were not even aware of beforehand**.

### Other Components & Visual Suggestions

4. **Past success stories** for founders and accumulative growth rates
  - a. Showing simplified case studies of companies that have already taken the assessment and had success
  - b. These will be on the right-side bar (refer to infographic below), and will be 1-2 sentence quotes/testimonials.
5. **Simplicity**: Founders will be more willing to spend twice as long to look at an infographic than investors, so the visual **must highlight on successes**. They need to be able to look at this and see a **growth promise** within 10-20 seconds.

- a. The Bar graph below will show the rate of growth with (the x axis being time and y axis being percentages) of a startup who has taken the TABS Assessment



## INVESTORS:

### *The Problem:*

As investors, our biggest problem is time: we want to **efficiently** and **quickly** identify rates of success for a startup; however, to do so includes a tedious and time costly process to complete the proper due diligence. We need a **method of filtration** to eliminate unnecessary time spent on evaluations to maximize our investments.

### *The TABS Solution:*

In 24 hours or less, we provide you with a risk assessment and overall evaluation that expedites 95% of preliminary research and risk identification in a startup. Our in-depth analysis separates and clearly identifies strengths and weaknesses, so you don't have to. Our focus for investors is how we can optimize their evaluations processes" and maximize their investments.

### *The Infographic:*

This infographic is all about **evidence**. Investors don't want a long pitch; they want to know how we are going to **efficiently** provide a **quality and quantitative** solution. To market our software best to investors, we have to address their largest problems: time. They want the bottom line, concise and thorough, fast, solutions.

### **Value Drivers**

1. **Time** needs to be short – Max 3 visuals on page and simple. Investors will spend half the time looking at this than founders will. Provided that, it is imperative that we immediately address the problem of time and the arduous evaluation process.
  - a. This visual will be a circular clock with 3 bullet points/statics in the clock shape
2. **Risk Mitigation Statistics**, this visual is going to highlight our ability to be **thorough and identify risks before they interfere**. To do this we will provide scaling of what constitutes a good TABS score and the components that it evaluates → this should be short and a visual that provides “a snippet” of what our services cover.
  - a. For this, I want to create a visual that includes 3 or 4 important statistics for how we mitigate risks with 3-4 work captions/labels
  - b. Below would be an idea for a visual to include that discusses/presents the components that the TABS Assessment evaluates



3. **The “ROI” for taking the TABS Assessment**, while this is more of an overall question to be answered, the value driver that needs to be emphasized here is our competitive advantage in the market. I envision this to be the largest visual in the infographic labeled “Your ROI”. This will immediately catch investors eyes because after all, taking the TABS Assessment is a form of investment.

## Exercise 2

### MARKETING STRATEGY ONE

#### MAKE THEM LAUGH, THEN WE WILL GET DOWN TO BUSINESS

My marketing strategy is catered towards **social media content**, we want a short and comedic video (1minute – 2 minutes) that can be sent around and posted.

My thoughts for this video is to start off in an “8<sup>th</sup> grade gym class”: dodge ball style

1. “the investors” are the team captains, they first start off by looking into the crowd of people to choose from, hesitant and confused,
2. Then “the founders” aka the players will be standing with and digital scores all of a sudden appear on their heads and data analytics start to pop up in a message board hovering above each person: this message board shows their TABS Score – with data analytics labeled by their strength and weaknesses
3. Within seconds, the investors race to choose the players with the best TABS Score while weighing their strengths and weaknesses
4. The dodgeball game plays out, but the idea is that your TABS Score and analytics allows investors to quickly and easily filter through the startups

The theme of the advertisement is “**what’s your score?**” and that will be the video hashtag as well, and to find this out we will provide a direct link to the TABS Assessment

We would post this to all LinkedIn, Facebook, Pinterest boards, and other groups related to startups and VC Firms as well to attract a large cohort of people

### MARKETING STRATEGY TWO: IN PERSON ENGAGEMENT AND INTERACTIONS

**A POP UP “SHOP”/Stand.** This approach will work towards **increasing our physical presence** in the startup environment. These are the motives for the Pop-Up Shop

#### THE POP UP:

- Handing out “taste testers”
  - o Whether we are physically handing out a drink or food, (let’s say we hand out ginger shots, or espresso shots
  - o At the bottom of each cup/shot glass will be a TABS Score Number
  - o After the participants take their health shots, and see their score, that’s where we step in to explain what their score means – treating them as if they were a startup and we were analyzing their TABS Score
  - o This interactive marketing **strategy is personal, engaging, and gives them a literal a figurative “taste” of how we can help them**
  - o After this interaction “activity”, we begin to ask them more about their own startups and we BEGIN to produce a TABS Assessment for them but in order to finish and get their results (or we can opt to give them partial results at the pop up) they sign up **right at our stand** to get their TABS Assessment Score compiled

Startup events to capitalize the Pop-Up Shop At:

South by southwest, (SXSW, Canadian Dream Summit, SaaStr Annual (more for investors and VC firms), TechSummit, etc.

## Exercise 3

### STEP ONE: FIRST EMAIL RECEIVED

This first email needs to focus on **building a relationship and awareness**

Steps I will Take to Create the First Part of The Campaign:

1. Distinguish our target group: early stage startups
  - a. My first email would contain “tips for startups”, again not necessarily selling the TABS Assessment, but rather hinting at it. The email would contain links to step-by-step articles, interests’ posts, and quotes
  - b. Subject line: “is your startup not experiencing high growth rates?”
2. Campaigns objective: User onboarding
3. Create an automated list: using a CRM system that will automatically send our campaign emails to subscribers of related websites
  - a. This approach allows us to narrow down who will be my most beneficial audience in terms of customer engagement and return rate
4. Content
  - a. Step one: Providing excerpts and links to OUR Pinterest board that is all articles and motivational pins related to growing your startup, mitigating risk, and the best ways to present yourself to investors
    - i. Key: **hint at what our services are, indirectly create the need for our service**
    - ii. **This first email will be a “Welcome Email”**
    - iii. **Subtly hint towards our services, but we have to focus on nurturing our leads first**
      1. My first email will look like this and the to further their interest, but not push it in their face I will introduce a link that will be titled: **How to Keep TABS on us?**
    - iv. **Sign off the Email from our Founder**
5. KPI: Click-to-open rate/contact’s engagement level
  - a. this KPI is all about understanding our current audience – who opened the email – and tapping into their motivations. Having a high Click-to-open rate is a clear indication that these people are not only opening our emails but engaging with them as well. Open Rates are important because they will tell us how we should be presenting the email.

- b. Once they have clicked on those links, we use our KPI to track those that engaged in our previous email and send a follow up email regarding our services.
6. AB Testing: I will use AB Testing to help with my second email, to show which subject lines are effective based on click rates
- a. **A possible model of the first email might look like this** (but more visually appealing)

Hi there,

I'm Wade, a cofounder at Zapier. Our helpful Zapbot is telling me you got a Zap up and running. Way to go!

If you are looking for more things to explore, check out the [power user tag](#) on our support forum.

You can learn how to:

- \* [Use Zapier with webhooks to sync data from anywhere](#)
- \* [Pass named variables you define into your action](#)
- \* [Copy Zaps to quickly generate similar style zaps](#)

Also, you can [get more tasks](#) for free with our rewards checklist ;)

If you have any questions about how to use Zapier, just hit reply to this email. We are dedicated to offering you amazing support and we're happy to help you get started.

Wade  
CEO + Cofounder

P.S. Something new we're working on is team accounts / shared billing. If this is interesting to you, [click here!](#)

## b. Potential Timeline





## STEP TWO: FOLLOW UP EMAIL

### OUR “ARE YOU NOT CONVINCED YET” EMAIL

#### Steps I will Take to Create The Second Part of The Campaign:

Personalize: this email needs to be as **catered towards the person/audience as much as possible**. The more personal and solution-based we can get towards their respective startup, the more we create a personal incentive for them to not disregard this email and to take the assessment.

Context: Start with their personal name, then I am going to give them a compliment about their current operations for their startups (complimenting people will always get their attention) then I want to tell them how I can even further their growth

Add Value: **Second email will be more powerful in driving clients**

- “free trial”
- Providing them a partial explanation of their TABS Score and to see the rest they have to sign up for services

Re-engagement: I might send them a discount code or change our previous email design,

End with Call to Action: “I want to learn more about how I can help you, here is a link to my Calendly, let’s choose a time to talk so we can get you investors, or vice versa”

KPI: Unsubscribe Rate: through this KPI, anyone who further “unsubscribes” or ignores this email we can stop catering our campaign towards which will further narrow our target market. Our unsubscribe rate will let us know how to plan our email frequencies and message content.

Thank you for your time and reach out to [ajulia@umich.edu](mailto:ajulia@umich.edu) for further questions.