



# Marketing & Sales Strategy

*Sustainable Growth - Optimizing Business Operations*

April 14, 2024



# Your Optimizing Business Operations Cohort



**STREET COMPANY**



**SUAY**

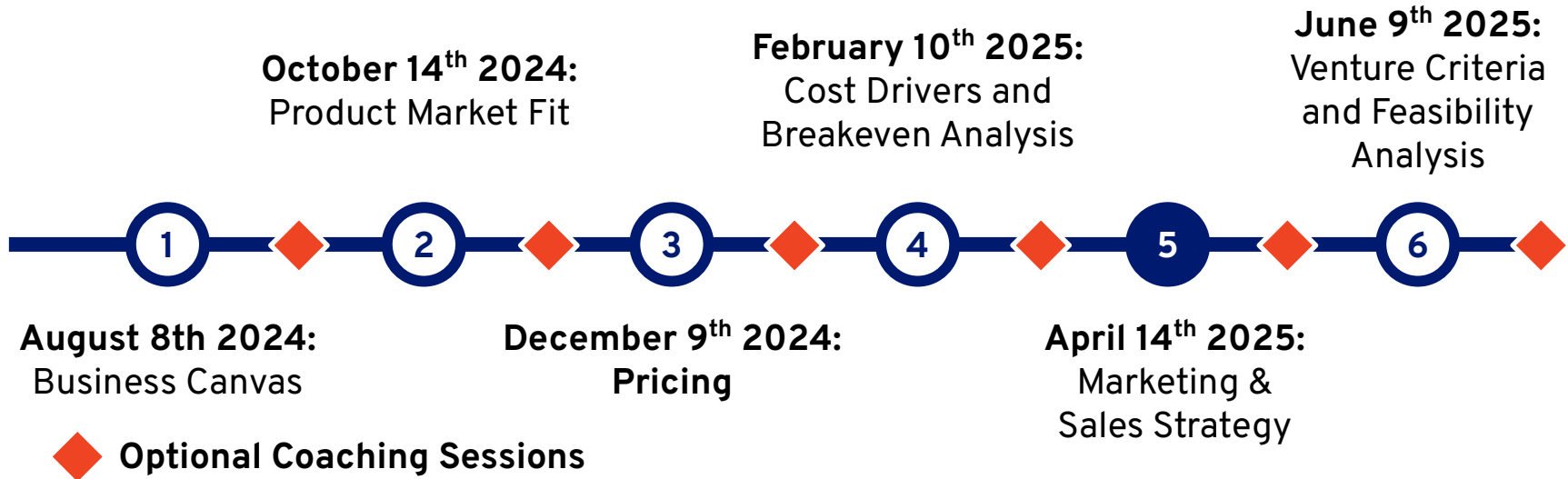
**auticon**



**MERISTEM**



# Sustainable Growth: Optimizing Business Operations Timeline



# Program Announcement: Optional Technical Assistance

**As a reminder, you can continue to access Technical Assistance through CA RISE. Below are opportunities for additional support beyond the 1:1 project you can access through your RM.**

## **Listen4Good:**

We are offering Listen4Good's Premium Program in Jul 2025 which includes:

- Survey templates for surveying community members, clients, volunteers, staff, and partners
- 1:1 coaching from experts in survey design, increasing response rates, and data analysis
- SurveyMonkey Premier account
- Client survey benchmarks—comparing your survey results to similar organizations
- Step-by-step webinars and a core web app with templates, resources, and FAQs

**If interested, please email Galiana at [galiana@redf.org](mailto:galiana@redf.org)**

## **NorthStar Digital Literacy:**

We are offering a one-year subscription to NorthStar's Digital Literacy Curriculum, which will enable your participant employees to access tools that support:

- Mastering the basic skills needed to use a computer
- The internet in daily life, employment, and education.

This opportunity also includes three 90-minute training flights designed for someone on your staff who is/will be responsible for digital literacy education.

**If interested, please email Galiana at [galiana@redf.org](mailto:galiana@redf.org)**

## **CFR Direct Deposit:**

We are offering support with direct deposit to your participant workers through CFR focus cards.

Direct deposit is the fastest, safest, and most reliable way to pay employees—and a powerful step toward financial security.

**If interested, please email Galiana at [galiana@redf.org](mailto:galiana@redf.org)**

# Program Announcement: Upcoming Optional Workshops

We will continue to release optional content including workshops that you can attend! We want to gauge interest in the August Sessions as they require a significant time commitment

## May 2025:

- **May 6 – 8: Advancing Financials Series**
  - **May 6:** Double Bottom Line Analysis
  - **May 7:** Raising Impact Capital Strategy
  - **May 8:** Embedding Data & Finance in your Decision-Making – TBD

## June & July 2025:

- ▣ **June 3- 17: Executive Skills and Career Readiness Series**
  - **June 3:** Executive Skills
  - **June 4:** Lived Experience and Career Readiness
  - **June 5:** Career Readiness Curriculum Deep Dive
  - **June 17:** The Case for Embedding Executive Skills into your Organization
  - **July 1:** Leveraging Implementation Science to become an Executive Skills Focused Organization
- ▣ **July 10: Addressing Burnout**

## August 2025:

**Gauging Interest** - We can offer the Management Center's Training on Effective Management, which provides tools and resources on how to drive impact, strengthen culture, delegate projects and responsibilities effectively (without micromanaging), address unconscious bias, build strong manager-staff relationships, and use feedback to manage performance and improve results. Minimum time commitment 6 hours.

If interested, please email Katie at [korovecz@redf.org](mailto:korovecz@redf.org)





# Community Agreements

- Stay engaged - please keep your camera on if you can
- Listen to understand
- Take space, make space
- Nobody knows everything, but together we know a lot
- Challenge assumptions
- Expect and accept non-closure
- Center participant workers
- Embrace diversity in all of its forms
- Create a safer space for sharing / refrain from attribution



# Session Overview

Today we will:

- Create Sales Goals and discuss Marketing Activities
- Gain a deeper understanding of the Sales Funnel and how Marketing Activities create movement in the Funnel
- Discuss 5Ps to improve sales outcomes and marketing activities

*There is so much more to discuss about marketing and sales strategy – we will get into more specifics during the coaching session. Today's goal is to give you an overview and some tools to start engaging with.*



## Check-in Reflection

What's **something you bought based on great marketing?**  
Write a 2-3 sentence review. What was it? What made you buy it? Was it worth it? Bonus points for links to ads!

*Please put your thoughts in the chat. And then, share connections with some of the other comments in the chat.*





# Sales Goals

Sales goals are **specific targets** a business sets to measure **how much it wants to sell** within a certain time period—like a day, week, month, or year. They help **guide planning, track performance, and motivate your team.**

When setting sales goals, it's important to use data.



# Here's an Example from Latte Larry's

- **Context & Data**

- Last month, Latte Larry's had 80 customers per day for 30 days with an average purchase of \$6.50.
- $80 \text{ customers/day} \times \$6.50 \times 30 \text{ days} = \$15,600/\text{month}$
- For the last year, Latte Larry's fixed and variable costs are \$12,000
- But, this month, due to tariffs, variable costs are increasing by \$2,000. And, a Starbucks is being built one block away.

# Here's an Example from Latte Larry's

- **Setting a Goal**

- Latte Larry's decided to go all in on its customers and **set an ambitious goal of gaining 10 more customers each day** while keeping the cost of its drinks the same. That doesn't mean they'll get the customers! But let's follow this hunch...
- $90 \text{ customers/day} \times \$6.50 \times 30 \text{ days} = \$17,550/\text{month}$  (vs. \$15,600 currently)
- If they get the customers, that would lead to an increase of \$1,950/month, nearly offsetting its new tariff-induced expenses

## Putting it Into Practice

**Solo activity:** Take a look back on last year's sales. What worked well? What would you like to change? Then, using a market analysis, decide if you're going to set an ambitious goal or a less ambitious one.

Once you land on a clear, measurable goal, share it in the chat. We'll ask a few people to share how they arrived at their goals.

*7 minutes of individual writing time*



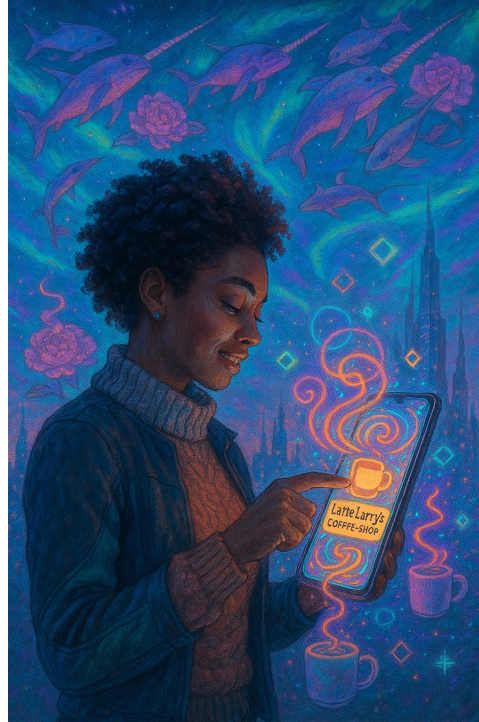
# Exploring the Sales & Marketing Funnel



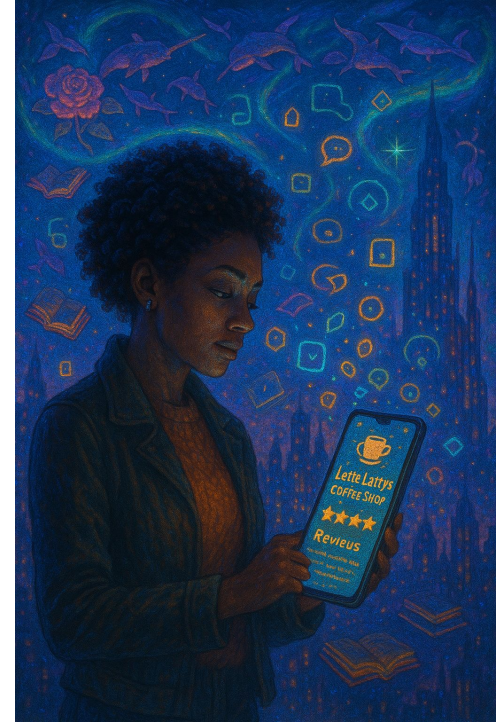
# Awareness



# Interest



# Consideration

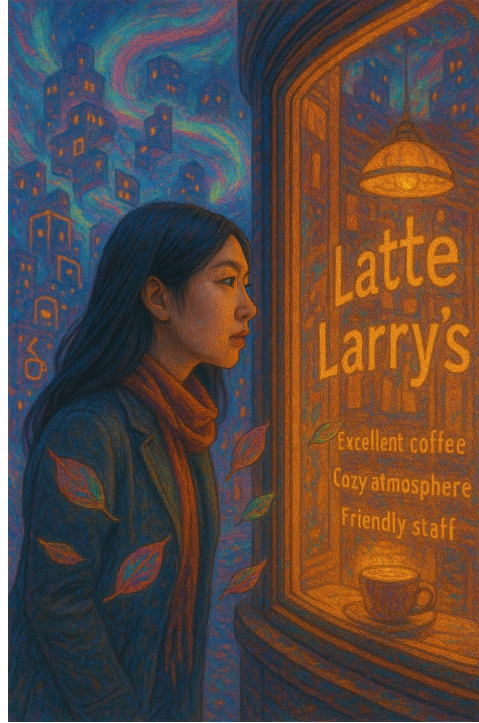




# Awareness



# Interest



# Consideration





# Intent



# Balking



# Evaluation



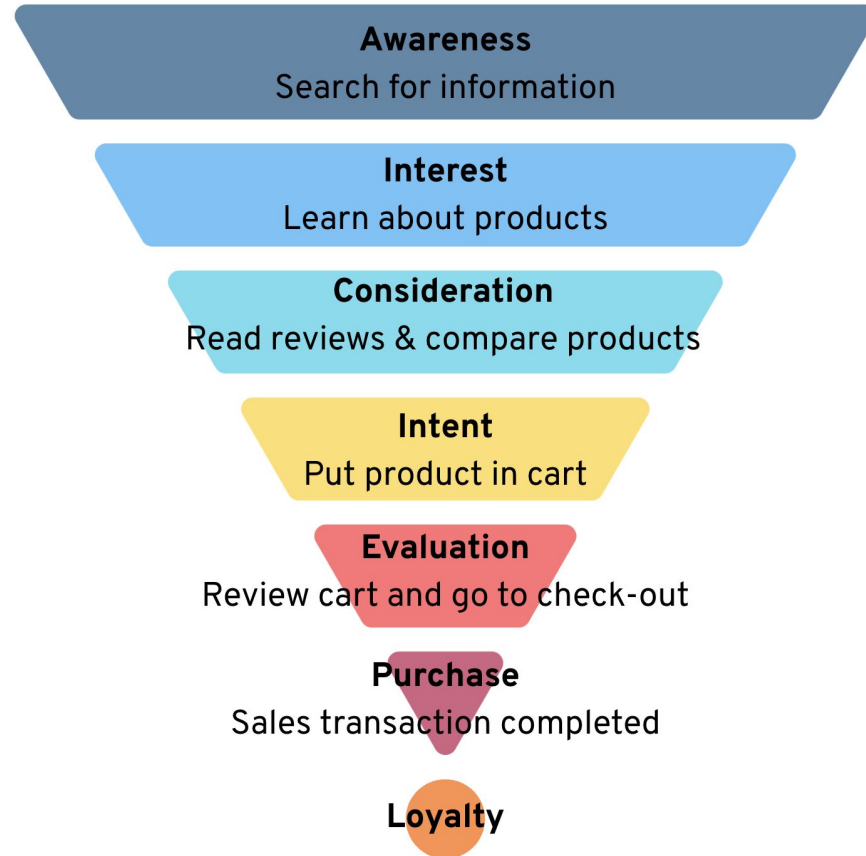
# Purchase



# Loyalty



# Digital B2C Funnel



# B2B Funnel



# Putting it Into Practice

**Group activity:** In your group, share your sales goal. Then, walk through the funnel in the tool with your group to discuss which parts of the funnel already support your goal and which could be strengthened; where should you focus? You also may not know and that's okay! Maybe this is an opportunity for research. Jot that down in the tool, too.

- For example: Latte Larry's is working to gain 10 more customers per day to meet their sales goal. They hunch that their issues lie in building awareness and interest for their unique coffeehouse experience and are convinced they can make the sale once people enter the store. But hunches aren't always right!





## Putting it Into Practice

**But first, choose a room!** Choose the breakout room that's best for you. If we don't have enough people in a room, we may combine groups for stronger discussions.

- B2B products
- B2B services
- B2C products
- B2C services

*~12 minutes of group collaboration*



## Whole Group Sharing

What's **one thing you're taking away** from the conversation with your group?

*Please put your thoughts in the chat.*





# Stretch Break

Use 2 minutes to move around and take care of yourself.



# How do you know what to change? Data!



Gather **customer feedback across the sales funnel** and look at your **sales activities**. Digitally this is a lot easier because you can track carts, purchases, etc. but in person you may not know someone was at the top of your funnel looking and deciding between you and another option. Surveys are helpful tools for collecting data. We'll share some questions after the session!

# More Data is More Useful

A competitor to Latte Larry's, Freedom a La Cart collects feedback/data in a variety of ways:



## Catering

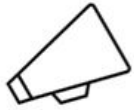
- Random Review Requests
- Annual Survey
- Accessible email & phone calls
- Repetitive Questions



## Café

- Review Requests
- Annual Survey
- Accessible Phone calls
- Google, other social media
- Repetitive Questions

# While there are many marketing actions you can take, improving sales funnel activities comes through the 5Ps



## Promotion



*You send e-mail marketing to all previous customers*



## Product



*You release a new vegetarian meal to cater to vegetarians*



## Price



*You create a teacher discount to attract nearby teachers*



## Place



*You start sending a sales team to meet with potential B2B customers in person*



## Process



*You adopt a new PoS system to make checkout more seamless*

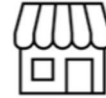
# Match the 5Ps with the Sales Funnel



## Process



*You adopt a new PoS system to make checkout more seamless*

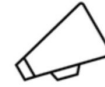


## Place



*You start sending a sales team to meet with potential B2B customers in person*

# Match the 5Ps with the Sales Funnel



## Promotion



*You send e-mail marketing to all previous customers*



## Product



*You release a new vegetarian meal to cater to vegetarians*



## Price



*You create a teacher discount to attract nearby teachers*

# What Ever Happened to Latte Larry's Goal?

Latte Larry's was sure they could attract 10 more customers each day so they put all their energy into **Promotion**, focusing on the **top of the funnel**.

But, after completing a **survey**, they realized that they were surrounded by vegan restaurants and their lack of vegan options was actually prohibiting customers from buying their products. So, they added alternative milks to the menu, changing their **Product**, focusing on the **Evaluation** part of the funnel. Customers began to increase!





## Putting it Into Practice

**Group activity:** Recall the parts of the funnel you decided to focus on in the last activity. How might you use the 5Ps to think about interventions you could have with your customers? If you need more data, make a note of that, too!

Discuss your ideas and brainstorm some more with your group. You can record them in the box at the bottom of the tool.

*~12 minutes of group collaboration*



## Whole Group Sharing

What's **one thing you're feeling inspired by** from the conversation with your group?

*Please put your thoughts in the chat.*



# What's Next?

- Keep thinking about **strategizing for Marketing and Sales.**
- Join us for a **coaching session on Marketing & Sales Strategy on May 12th @ 11am-12:30pm.**
- **Remember:** Responsive Technical Assistance on Pricing is available!
- **Questions?** Contact your Relationship Manager!
- **Will Portnof - [wportnof@redf.org](mailto:wportnof@redf.org)**
- **Jamie Stark - [jstark@redf.org](mailto:jstark@redf.org)**



# Feedback Survey

Please take a few minutes to fill out our Survey on this session.

<https://bit.ly/SGTOptimizeAll>

This feedback helps us improve your experience and plan adjustments to make moving forward.

