



Marketing & Sales Strategy Coaching

Sustainable Growth - Optimizing Business Operations

May 12, 2024



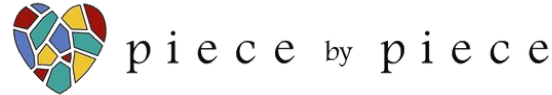
Your Optimizing Business Operations Cohort



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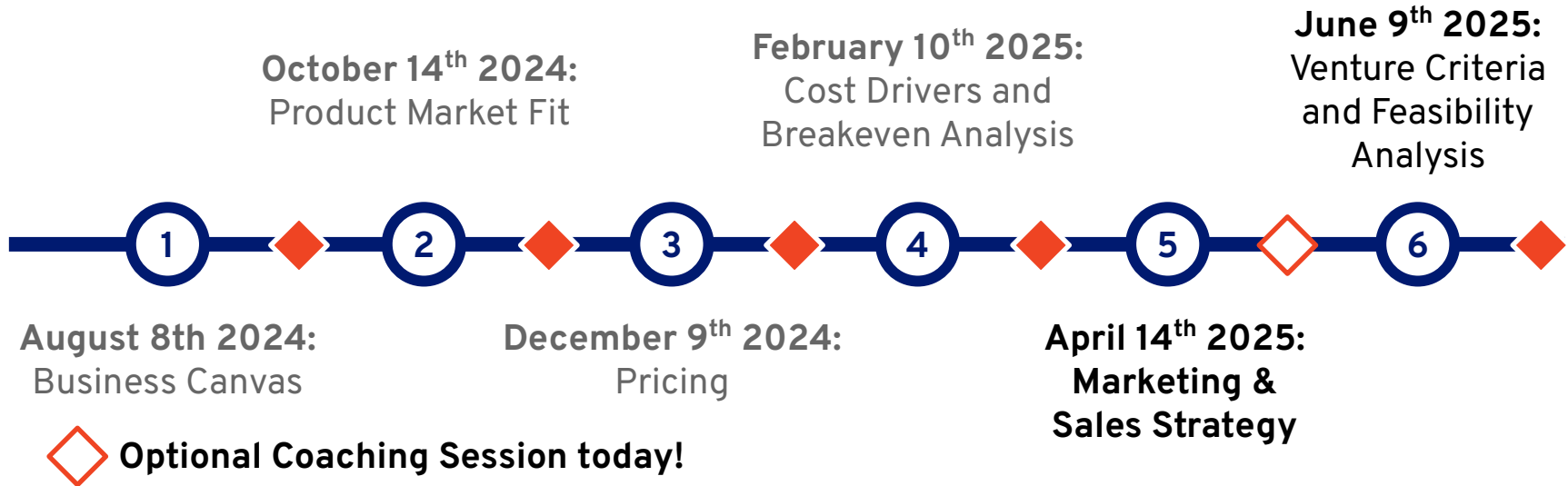
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MERISTEM



Sustainable Growth: Optimizing Business Operations Timeline



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:

- Review the Sales Funnel, Marketing Activities and the 5Ps
- Explore a variety of Sales Channels
- Work collaboratively to support each other's Marketing and Sales Strategies



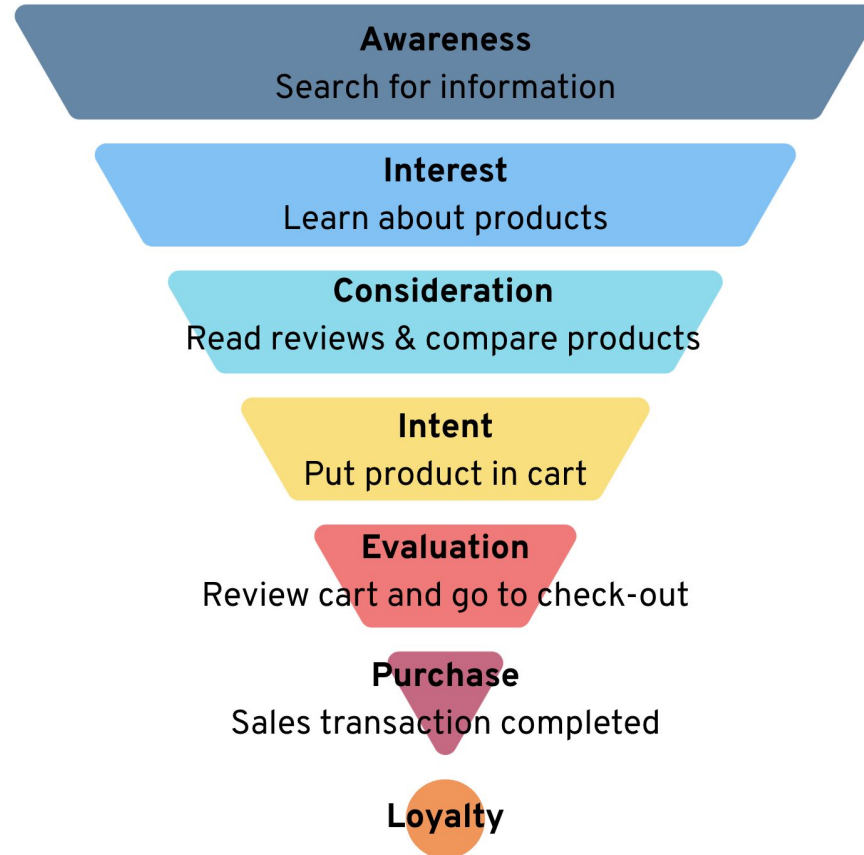
Check-in Reflection

What is a take away you have from our last main group session on Marketing and Sales? And/or, what is one hope you have for today's coaching session?

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



Review: Digital B2C Funnel



Review: B2B Funnel



Review: Improving sales funnel activities comes through the 5Ps



Promotion



You send e-mail marketing to all previous customers



Product



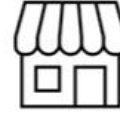
You release a new vegetarian meal to cater to vegetarians



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

Putting it Into Practice

As we review the 5Ps, let's consider:

- 1) What part of the funnel or 5Ps have you been most focused on as a business? What interventions have you tried?
- 2) What part of the funnel or one of the 5Ps do you feel like you need to spend more time with? What could you do differently?
- 3) Focusing in on loyalty a bit how loyal do you feel your customers are? Do you have data to check in on customer loyalty? Is there anything you would like to change here?

3 minutes of individual time and 15 minutes for group discussion



Whole Group Sharing

What's one thing you heard someone else say in your breakout room that resonated with you and/or that you are taking away?

Please put your thoughts in the chat.



Stretch Break

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



Sales Channels

Sales channels are the **different ways businesses generate revenue by selling goods or services**. These channels are important to discuss as you balance mission impact with financial sustainability.

You can choose which channels are a good fit by considering: **workforce skills, product/service type, market demand, capacity for production or service delivery**.

Following are some examples. **As we discuss each one, if your business uses the channel or wants to, let us know how in the chat!**



Sales Channels Overview

B2C	B2C	B2C & B2B	B2C & B2B	B2B	B2B	B2B
Online	Special Events	Referrals	In Person Sales	Distributors	Bulk Sales	RFI / RFP Responses
<ul style="list-style-type: none"> - Web Store - Social Media - Email Marketing - Mobile Apps - Marketplaces 	<ul style="list-style-type: none"> - Farmer's Market - Pop Ups 	<ul style="list-style-type: none"> - Current Customer Referral Program 	<ul style="list-style-type: none"> - Retail Store - Sales Rep 	<ul style="list-style-type: none"> - 3rd Party Retailers - Resellers - White Labeling 	<ul style="list-style-type: none"> Wholesalers 	<ul style="list-style-type: none"> - Government Contracts - Institution Contracts

Online (B2C)

- Selling products or services online. Does not need to be digital services – remote products can be physical.
- Example
 - A collective of LGBTQ+ mental health counselors opens up a digital practice focused on youth in rural areas.
 - A coffee shop sells their coffee subscription through their instagram page
- Benefits
 - Scalable and accessible beyond geographic limitations.
- Challenges
 - Requires tech infrastructure and training

Special Events (B2C)

- Selling at any special event that occurs in communities (e.g., farmers markets, holiday fairs, or pop-up shops)
- Example
 - Selling jams (including new flavors) at a local farmers market June - August
- Benefits
 - Builds brand awareness; lower overhead; good for piloting products; can target certain spaces/events.
- Challenges
 - Irregular income; labor-intensive setup.



Referrals (B2C & B2B)

- Generating new sales through recommendations from existing customer base and/or partners
- Example
 - A nonprofit partner refers its own donors to purchase products made by ESE program participants.
- Benefits
 - Builds trust from new clients.
- Challenges
 - Requires consistent support and loyalty-building of existing customers and partners

In-Person (B2C)

- Selling directly to individual customers through physical storefronts or through sales representatives
- Example
 - B2C; A café run by returning citizens selling coffee and pastries to walk-in customers at their retail location.
 - B2B: A graphic design ESE's sale representative going door to door at local businesses engaging with potential customers
- Benefits
 - High control over brand and customer experience
- Challenges
 - Requires marketing investment and strong customer service training; could have high overhead costs



Distributors (B2B)

- Selling products through third-party retailers, resellers, and white labeling partners.
- Example
 - An ESE supporting heritage soybean farmers makes soy candles that are sold in Whole Foods or hotel gift shops branded as their own
 - An ESE sells peanut butter that is labeled as Whole Food's 365 brand
- Benefits
 - Wider reach without running multiple storefronts.
- Challenges
 - Lower profit margins; less control over brand story or customer interaction.



Bulk Sales (B2B)

- Selling products through wholesalers.
- Example
 - An ethical coffee bean company that sells bulk quantities directly to Amazon.
- Benefits
 - Wider reach without running multiple storefronts.
- Challenges
 - Lower profit margins; less control over brand story or customer interaction.

RFI/RFP Responses (B2B)

- Responding to Requests for Information or Requests for Proposals to sell products or services in larger quantities to government entities or other organizations that have formal processes for large contract awards
- Example
 - A landscaping enterprise winning a city parks maintenance contract.
- Benefits
 - Sizable income if secured
- Challenges
 - Complex procurement processes; may require certifications or scale; used to be stable but recently less so



Putting it Into Practice

Many of these sales channels can be stacked to create a multi-layered strategy. Use the worksheet to identify which of the sales channels your business uses and how well they work.

After you're done, we'll move into breakout rooms to discuss what's working and brainstorm new sales channel possibilities for each business.

5 minutes of individual writing time + 15 minutes in breakouts.



Other Ideas for Sales Strategies

- Subscription Services
 - Monthly subscription box of chocolates from organic farmers around the globe.
- Franchises
 - Replicable business model
- Sales Team
 - A team that can support things like: pop-ups and corporate events
- Affiliate Marketing
 - Working with affiliates who sell products for commissions



Whole Group Sharing

We covered a lot today – **what do you want to learn more about?**

The CBT team will connect you with resources after the session today.

Please put your thoughts in the chat.



What's Next?

- Keep thinking about **strategizing for Marketing and Sales.**
- Join us for our final session **on Venture Criteria and Feasibility Analysis on June 9th @ 11am-12:30pm.**
- **Remember:** Responsive Technical Assistance is available!
- **Questions?** Contact your Relationship Manager!
- **Will Portnof - wportnof@redf.org**
- **Jamie Stark - 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.

