

Western New England University
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Julia Mines: Leadership and Communication
Coach

Final Marketing Plan
MK 421

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Company

Brief History:

Julia Mines is a leadership coach/mentor who works primarily with individuals and companies in a professional capacity, in order to further skills that will aid in their careers. For approximately two decades Julia has been working with clients in both the non-profit and for-profit sectors. She is an ICF certified coach and has many years of experience as a program developer and workshop presenter in wellness and personal growth at Kripalu Center for Yoga and Health, the largest holistic health center in the United States. Julia holds certificates in Positive Psychology as well as Positive Psychology Coaching through the International Coach Federation. Within the field, Ms. Mines has trained with influential persons such as Tal Ben-Sharhar, PhD. (author and professor at Harvard) and Robert Biswar-Diener, PhD. (author and neuropsychologist). Some of the services she offers are executive coaching which includes one to one meetings to help a leader in achieving a particular goal, she also offers workshops and helps people to improve communication skills in the workplace (Julia Mines).

Mission Statement:

Julia exists to help professionals realize their leadership potential and enrich their professional lives. On Julia's website, she has the tagline "Clarity of goals. A voice to lead with." underneath her picture on the home screen (Julia Mines). This tagline helps to get some of her values across, one being providing hope, another being self-actualization, and the last being self-transcendence. Some other values that Julia's coaching services has is motivation, reduces anxiety, rewards me, simplifies, makes money, integrates, quality, and variety.

Value Proposition:

Julia Mines' leadership coaching/mentorship service has benefits such as getting promoted/recognized, increased productivity, creating your own leadership identity, and more efficient communication between team members. These benefits are achieved through working on finding one's leadership identity, tips on how to be recognized, increasing levels of motivation, and methods on how to better communication skills. They help companies work more efficiently as a whole and help further the careers of individuals. The clients' main problems are the feeling of wasted time in a dead-end job, low motivation in teams leading to poor productivity, and lacking in leadership direction. Julia has a lot of experience dealing with these perceived problems and working to mitigate them. She has trained with

professionals in the field, as mentioned in the brief history section, and has two decades of experience and clients to back it up.

Strategy

The strategy for Julia Mines' leadership coaching/mentorship when using Ansoff's Product/Market Opportunity Matrix, is the market penetration strategy. The market is already somewhat saturated with various coaches/mentors, with the focus being on Julia's competitors on a more local scale. In Western Massachusetts alone there are roughly 22 other leadership and/or life coaches besides Julia Mines (WMCA). There are several more spreading throughout the entire state of Massachusetts. Location wise, there is a lot of competition in the surrounding area of Julia. Ms. Mines operates in both the coaching and leadership sectors of the industry which gives some overlap in competition. The Business coaching industry as stated by IBIS, "...includes companies that offer short duration courses and seminars for management and professional development. Training is provided through public courses or employer training programs" (Pradhan, 2020). While the Industry as stated by IBIS includes, "practitioners that primarily help clients set and achieve personal goals. Such goals can pertain to a client's job, personal life or interpersonal relationships" (Fernandez, 2012). When taking a close look at Julia's competitors, the team selected two local coaches. Both of which were compared via their websites against Julia's in this past fall's data, the first website being callingsandcourage.com and services provided by a woman identified as Katherine. The other competitor's website is leadershipcoach2.com with the services being provided by a man named Grant Ingle, PhD. The competitors both have similar offerings to Julia however they each have varying credentials, whether it be certifications, an MBA, or a doctorate.

SWOT:

The SWOT Analysis consists of the strengths, weaknesses, opportunities, and threats of a company. This analysis is used to assess what a business is doing right and what can be improved upon. Julia Mines' has a slightly different SWOT analysis as compared to a company with a product because she offers a service. Based on her website, reviews, information she has told us, and information given to us by Professor Goodnight we have generated a SWOT analysis in reflection of those materials. The competitor's strengths and weaknesses will be gone over in a later part of the paper.

Strength:

One strength that Julia has for her leadership coaching service is that she had already been utilizing Zoom with some previous clients. She was using Zoom to expand her services to clients in different parts of the country therefore, creating a bigger customer base for herself. This also allowed her to transition seamlessly to have her services mainly online when the pandemic started. Julia was already familiar with the program and could easily fit it into her business model. When clicking upon the “Let’s Talk” button on Julia’s website, this leads you to a page where a potential client can enter their information. The page informs you that Julia is available to meet in person, over the phone, or by video. (Julia Mines)

Another strength Julia Mines’ has is that she works with both individuals and groups on a variety of needs. Based on what the client identifies their needs to her as, she works with them in sessions or workshops to help them meet their goals. This creates a wider market in which Julia can work with. This can be found on her website when she mentions various types of clients she works with.

Weakness:

One weakness that we have found through distributing surveys for Julia Mines is that many survey participants do not understand what her service is exactly. Through viewing her website alone, we have had respondents who think she is a motivational speaker, a therapist, and/or a life coach. After explaining over the phone what she does, the participants seem to have grasped it better. Upon hearing Julia’s explanation of her business, the first time, the team was also confused as much of the way it was described used vague words.

Another weakness that the team took notice of came when browsing her website. When visiting her ‘Humor’ page, we tried to access the links from ‘earliest incarnation’ to ‘babies’ but was sent to an error page with one of the links not hyperlinked at all. When performing a website analysis for her against a similar service, we noticed that a few of them had an introduction video explaining their service and their experience which could be an option for Julia as that is not currently part of her website.

Target Market:

The target market Julia Mines currently focuses on includes managers & team leaders, executives, and entrepreneurs. The leadership and communication coach will be provided to industries in the private, public, and nonprofit sector. This service is specifically focused on individuals who need to improve their personal skills so they are able to increase

their work performance and are able to do a better job at leading their employees; often this will be aimed towards individuals who are part of middle management or above.

There are many different demographics that will be impacting the target market for leadership and communication consulting. Creating a demographic profile for consulting services will allow us to have a better understanding of what market we are looking to reach and what market is currently being reached. Using MRI Simmons Insights, we were able to find the demographic profile of Consulting Services. The below graphics give insight to some of the characteristics that managers or team leaders would need to have to be clients of Julia Mines.

For this target market we have different buyer personas because of the great variety of services that are provided through leadership coaching. One of the most common buyer personas will include individuals that hold high ranking positions in the company such as executives or department managers, a great example of this type of persona could be the President of Western New England University. While he is not the President of a company, he holds different leadership qualities that have allowed him to be in such a position. Dr. Johnson is a middle aged male local to the New England area who has had a 30-year leadership career that has allowed him to experience working in different environments in different conditions. He has received his Ph.D. in Higher Education Administration which has allowed him to hold different leadership roles throughout his career. Those positions varied from supervising a small number of individuals to supervising a large number of individuals which have allowed him to gain experience in managing and leading others. Dr. Johnson presents one of the most common buyer personas for Julia Mines because he is an experienced leader.

While there are individuals who are very successful in their careers and would still reach out to a coach/mentor there will also be individuals who are experiencing many difficulties in their current positions. Individuals who are experiencing difficulties such as lack of clarity, lack of leadership experience, weakened teamwork, and lack of communication will be the ones that would mainly want to focus and reach out to a coach/mentor for help in overcoming such issues.

Service Segmentation

According to IBISWorld, the products and services that are offered under the business coaching industry are: management development training, professional development training, quality assurance training, business training and other. The different market segmentations have different percentages and are important for different developments. When looking at professional development training, we would be focusing on creating seminars and courses on topics such as finance and accounting, communication

and interpersonal skills as well as marketing and time management (IBIS). This specific service is being focused on an individualistic development than a team management development.

The management development training will be targeting middle and senior level management where they will be offering services in strategic business management and supervisory skills, sales management and IT management focusing on corporations which are developing their managers (IBISWorld). Following we have quality assurance training which mainly focuses on the improvement of the production aspect of a business (IBISWorld). This is an important service because of many high-profile cases which have shown how a lack of management over process and production can affect corporations/companies. Along with the previous services another one is business coaching, which is the area that Julia Mines focuses on, executive training (IBISWorld). As the business world is progressing there is a demand for mentors who are able to assist executives in improving their leadership skills. Lastly, we will be looking at the other services that can be provided which include basic education programs, higher education, and special educational programs, as well as specialized training programs (IBISWorld).

Industry

Opportunity:

An opportunity that could be created for Julia by using her strength in Zoom, would be to advertise on her website that her sessions can be done remotely and therefore, safely during these uncertain times. Putting an emphasis on the topic of ‘effective communication while working from home’ as a workshop topic could prove to be incredibly popular since many businesses are operating in a hybrid state. Solutions to these issues are in high demand due to the pandemic right now, thus Julia could gain new clients as well as possible referrals down the road. In the Journal of Service Research, Berry talks of how online services may stay with us longer than we think, “In essence, service transformations offer “safety plus” options that many customers may desire for the indefinite future,” (Berry, 2020) which makes Julia’s video option a big asset going forward.

This leads into another opportunity which is referrals. Current or past clients may refer Julia’s services to their friends, family, and/or colleagues which would lead to new clients for Julia. Another type of referral would be if current or past clients wrote an online review for others visiting her website to see. This would help potential clients decide whether or not to use her services.

Threat:

A threat that Julia faces is that the market is somewhat saturated with other individuals/companies who provide similar services. Julia believes that therapists and other consultants are her competition while the team and Professor Goodnight, discussed that other leadership coaches/mentors are her primary competition. The competition listed could steal business away from Julia Mines in the sense that they may have a bigger network thus more referrals or have been in business longer which has garnered them more clients over the years. In Forbes' article titled *15 Ways to Stand Out in the Saturated Coaching Market*, their expert panel acknowledges how crowded the market has become, "The coaching and consulting industry is booming across a range of different business sectors. Unfortunately, this rise in popularity comes with market saturation," (Forbes Coaches Council, 2019) and then addresses how these threats might be mitigated.

Company Reviews:

On Google reviews, two pieces of feedback were given, "Coaching with Julia has brought me clarity around who I am and what I want to do in my work. She was very present hearing every word I said as well as what was underneath my words. She asked amazing questions that cut right through the clutter in my mind which brought me to greater clarity and awareness. With heart and skill, she guided me to the answers inside myself that I hadn't been able to access myself. Thank you, Julia, what a gift you are!!" which was accompanied by a five-star rating. The other review was similar, "Julia Mines was supportive and encouraging throughout the process. She listened and asked challenging questions to help guide me to what I really wanted/needed. I recommend Julia 100%!" accompanied by another five-star rating. On Julia's website she has a section for testimonials in which she has a total of fourteen reviews. Some are as simple as "Everyone should have a Julia.", to incredibly descriptive pieces such as "Julia is an amazing coach. She has been extremely helpful in multiple areas of my life. She helped me navigate and resolve a tough and complex career related decision and has inspired me to keep going with my personal and professional goals. She is gentle, compassionate, and brings so much honesty and integrity to our sessions. I wholeheartedly recommend her as a coach." These reviews reflect the significance that Julia has had in her clients lives and the improvements she has helped them make in a professional capacity.

Analysis of Company and Industry

Local and Global Competitors

Callingsandcourage.com

- **Background**

Callings and courage is operated and owned by Katherine Golub, who has an MBA. The company is also run with the help of 3 other people. Lin deals with newsletters, Marcie deals with bookkeeping and client care, Michele deals with the website. Katherine started in 2013, only working with a small group of people. After realizing she had gaps in her knowledge, Katherine went for her MBA and finished in 2018, she then began to expand her clientele. Katherine had taken the time to study and learn craniosacral therapy to hypnotherapy to mediation to health coaching to facilitation along with her MBA.

- **Mission Statement**

While there is no clear mission statement on her website. It is easy to infer the mission statement of her and the company. On the main page of her website Katherine states “I help people who feel uncertain about what’s next in their careers”. We can infer she deals with people who struggle their current career and are unsure of what the future holds for them.

Her mission is to bring clarity to these people and help them find their career path.

- **Inferred Value Proposition**

Katherine’s coaching has many benefits. She is able to provide comfort, clarity, understanding and guidance. When clients come to Katherine, she does four things for them. Makes them aware of their inside, outside views, shows them the inside work and outside work that needs to be done. Inside views, is an understanding of what you need, what you want and what skills you have. The outside view is an understanding of what the world needs, wants and what they are willing to pay. Inside work, is realizing your struggling, soothing your wounds and cultivating the ability to keep moving forward. Outside work, is taking actions. Such as having conversations, doing experiments and getting on track for the life you want. Katherine has done this with many clients and her testimonials are phenomenal. By helping clients come to an understanding of where they currently are and where they want to be, adds lots of value to the service Katherine provides. Katherine’s clients may experience pains of being unsure, having self doubt, low confidence or no sense of career direction. Through her services the clients will experience many gains as Katherine is able to make them aware of their inside view, outside view, inside work that needs to be done and outside work.

Leadershipcoach2.com

- **Background**

Grant Ingle is an organizational psychologist with over 30 years of experience in leading organizational change and serving as a management consultant and coach who serves to executives in leadership positions. On top of his 30 years of experience, Grant also has a PhD. Grant serves New England and the New York state area. Grant has a BA in psychology from Amherst College, a MS in social psychology from Umass Amherst and a PhD in organizational psychology from Umass Amherst. Grants LinkedIn profile lists over 6 groups he's involved with. He also serves as an external advisor.

- **Mission Statement**

Grant has no clear mission statement on his website. But he states his approach to coaching, which makes it rather simple to infer what his mission statement is. He explains the benefits of his coaching. Stating the client will experience, New clarity about what steps you need to take to improve your impact and effectiveness, Initial relief about having one-on-one support in undertaking this process, A confidential and ongoing forum for discussing issues, opportunities and needed changes, Gaining new perspectives and insights about your options, Growing confidence as you put desired changes in place. His goal is to help the client identify steps towards their goal, give them support, introduce them to new perspectives and help them grow confidence.

- **Inferred Value Proposition**

Grant provides lots of value to his clients and is able to help them accomplish many things. Not only is he very educated, he is also very experienced. Serving the industry for over 30 years gives him an advantage over others. Besides serving Western Massachusetts, he also provides services to all of New England and New York state. On top of being a life coach, Grant also provides services as an advisor. He serves as an advisor for organizations who are going through some type of a change. Serving as an advisor, he is now dealing with larger groups and teams rather than an individual. He is educated, experienced and has a large service area. Grant is able to help his clients grow personally and within their career by helping relieve stress, giving them one on one support and showing them new perspectives.

Trishpratt.com

- **Background**

Trish Pratt started her coaching business in 2000. She attended Tufts University and received her masters degree in occupational therapy. Trish is a graduate of the Executive Coaching Institute. She has many other accomplishments such as Receiving a Business Coach Certification (CBC) in 2002, Completing her Executive Coach Certification in 2003 from Executive Coaching Institute, Past Board and Committee member of the International Coach Federation (ICF) – New England, [DiSC®](#) expert and trainer since 2002, Received Professional Coach Certification (PCC) in 2005 (requiring a minimum of 500 active coaching hours), Published in Human Resource Executive Magazine (“Empowering Key Managers”), Inducted into [The Results System™](#) Founder’s Circle in 2011, Nominated for ICF-New England Executive Coach of the Year Award, 2014. Throughout her career trish has not only worked with individuals but also Fortune 100 companies.

- **Inferred Mission Statement**

As stated on her website. Her goal is to “Expand your potential. Bring possibilities to your life”. Her goal is to help you in areas of communication, personal leadership, strategic planning, decision making and career development.

- **Inferred Value Proposition**

Trish brings lots of value to her clients due to her education and experience. Not only is Trish very educated, but she is also very credible. On top of her education, Trish has a well established list of her accomplishments and certifications. Trish has also been serving clients for over 20 years. Her experience gives her leverage, as she has developed a credible platform for herself to serve clients. Trish has experience servicing individuals but also servicing companies. To any individual or company who needs help, Trish is a great option due to her education, experience and credibility. Trish deals with clients who may have pains such as being unsure of their career, low self esteem and clients who lack direction. They are able to experience gains from her services as she is able to help them develop personally as a leader, better their decision making, teach them how to plan strategically and help them develop their career.

Inferred Strategies of Competitors

- **Competitors Strategies**

The table below is developed based on Ansoff’s Product/Market opportunity matrix. Below are Julia’s competitors and their strategies along with reasoning.

Callingsandcourage.com	Leadershipcoach2.com	Trishpratt.com
Product Development	Diversification	Diversification/ Market Penetration
Katherine offers many products to her clients. On top of her services she also offers a free Ebook, audio and a self care compass on her website	Grant is not only a life coach but also an advisor. He deals with individuals, groups and companies. Grant does work for people all over New England and within the New York State area.	Trish is well certified. Allowing her to work with a variety of people and companies. Her certifications give her expertise to penetrate a variety of markets. Whether it be individuals, fortune 100 companies or even larger.

- **SWOT (Strengths & Weakness only)**

One weakness all of these coaches have is that they share a very saturated market. Finding new clients can be very hard when the market you operate in is saturated with many other life and leadership coaches.

Callingsandcourage.com

- **Strengths**

Katherines strengths are that she is not only very experienced and educated in multiple fields. She also offers her clients or potential clients free services on her website. These free services such as the Ebook, audio or self care compass allow potential clients to experience what she is about before paying for her services. People always like free things, these will attract potential clients to her. She has multiple people working for her, all of them provide expertise that will help her serve her clients better. Her google reviews are outstanding and it seems many people refer her services to others.

- **Weakness**

I believe her website is one weakness. It has tons of information about her and her team. But it is too lengthy and not to the point. The content is lots of explanation about her, which is good but for me as a potential client it is too much reading. Upon a simple google search, her business appears but it lacks to list simple contact information for her. It can be found on her website, but should also be listed on google.

Leadershipcoach2.com

- **Strengths**

Grant has a long list of strengths. Not only does he serve New England but he also serves the New York State area. He also diversifies his clientele by being a coach for individuals and an advisor for companies. Grant has a very well connected LinkedIn, many organizations and people. He is very well endorsed.

- **Weakness**

Upon a google search. There is not much to find about his coaching. It lists his website, phone number and linkedin. His google shows no reviews, which to a potential client may be a turn off if they do not do the search and explore his linkedin or website. A google search that results in a potential client seeing google reviews would be much more attractive. It is always nice to hear from people who have used a company's service in the past.

Trishpratt.com

- **Strengths**

Trish's strengths include her certifications, her clientele and her education. On top of graduating from Tufts, Trish has received numerous awards and certifications, making her very attractive to a potential client. Trish also deals with individuals and fortune 100 companies. Diversifying her clientele and being experienced in individual leadership coaching along with business leadership coaching makes her a well rounded option to anyone looking for a coach. She is located right in Boston which gives her access to clients within the city and in surrounding areas.

- **Weakness**

Along with the others, a google search of her company returns no reviews. While her website has endorsements and testimonials, there is nothing to see on google. As I stated before, as a potential client who is doing a quick search, seeing positive reviews on google would be a great indicator.

- **Inferred Objectives**

Based upon market data provided by IBIS World. The market for life coaches is estimated to be right around \$1 Billion. Between 2015-2020 the industry for life coaches only grew 0.07%. Meaning, if there are currently over 18,000 life coaches in the United States, every year we will see 1,250 more enter the industry.

On average, a life coach will work with 6 individuals a week (SCM). This is due to change for Julia's competitors as we can not view their books and see their clientele list.

Based upon the market being saturated and industry growth being low. Julia's competitors most likely will focus on maintaining their clientele in the coming years. In a saturated market, obtaining new clientele is very hard. While they may find new clientele, maintaining their clientele will be their main objective.

Other objectives of these 3 competitors will be to provide timely and efficient service. Most coaches see their clients for periods of 30 minutes to an hour (SCM), multiple times a week usually 1-2 times and on average for up to 6 months (SCM). Being efficient and effective will allow coaches to stay on schedule, see multiple clients a week and leave room for new clients.

- **Target Market**

Callingsandcourage.com

- Katherine has a target market of individuals who are uncertain about their career, people who are held back by fear, people who have doubt and people who are uncertain.
- Middle aged business professionals

Leadershipcoach2.com

- Individuals within New England and New York State
- People in leadership positions (most likely middle aged)
- Business executives
- Companies

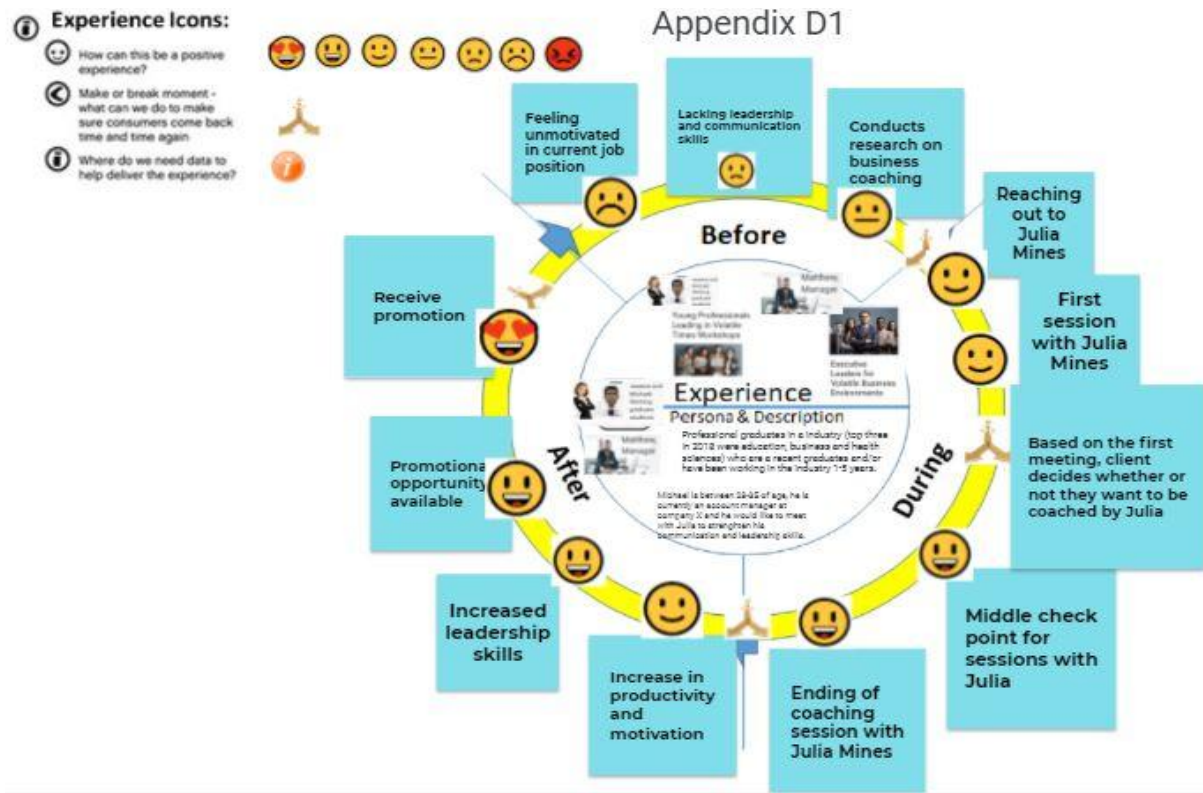
Trishpratt.com

- Individuals seeking leadership, communication, personal leadership and career development skills
- Small business owners
- Fortune 100 companies
- Business executives

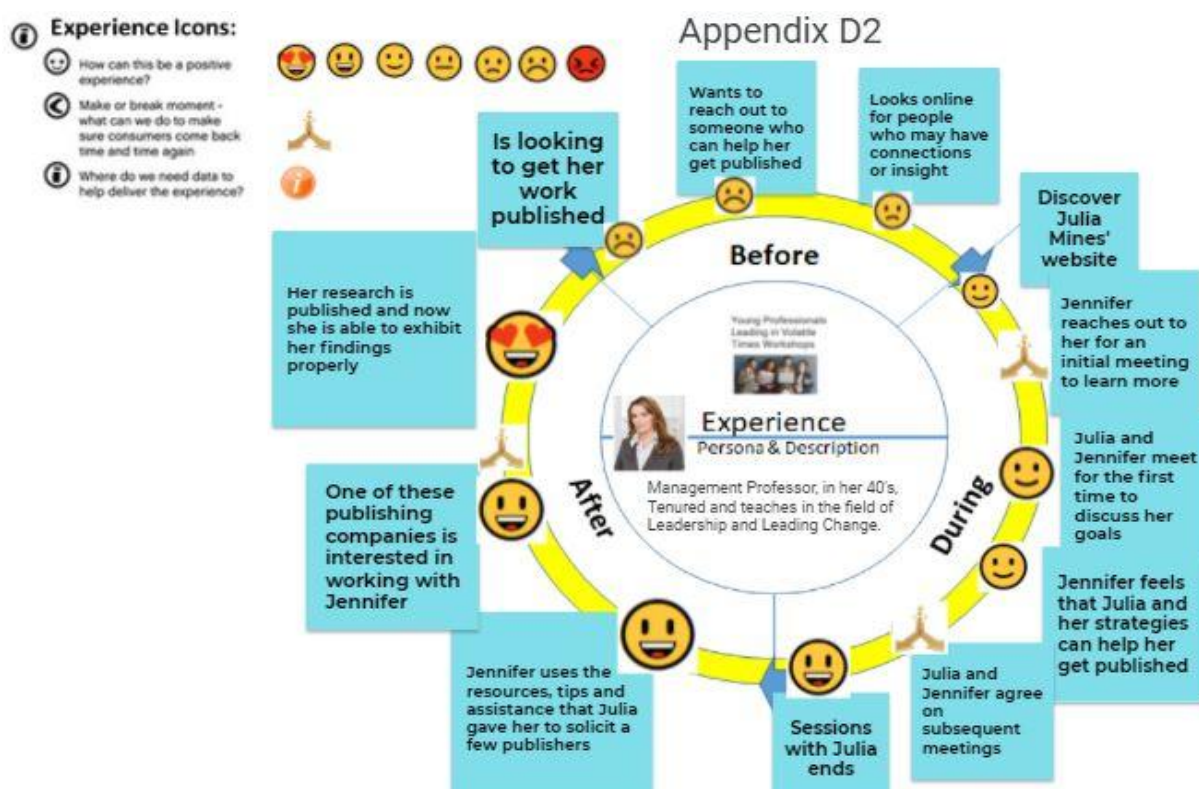
Global and Local Markets/STP

This section of the Marketing Plan will be examining the Global and Local Markets of our client, Julia Mines. It will also be examining the Segmentation, Targeting and Positioning that the team has been working on in addition to isolating elements such as the Customer Journeys, Buyer Personas and Best Segments for our client.

Consumer Journey



Customer Journey Diagram 1 (Consumer Journeys of Michael, Matthew, and Jessica)



Customer Journey 2 (Customer Journey of Jennifer)

The two images above are diagrams that the team created that depict the two types of consumer's emotions and feelings through the process of seeking leadership or communication coaching. It is separated into "Before", which illustrates the problem and thoughts of the individual before any action is taken. "During" shows the actions taken by both Julia and the individual in the process of working through the determined goals. Finally, the "After" shows the resulting emotion and actions that occur prior to leadership coaching.

Before

The first feeling of the end consumer seems to be dissatisfaction or lack of a certain aspiration that is not currently being met. The situation then progresses to a searching stage which shows the consumer looking for solutions and opportunities that can help solve the discontent or help them achieve their goals. In Michael, Jessica, and Matthew's cases, **(Customer Journey 1)**, it is a lack of experience or a feeling of unpreparedness for a future role. For Jennifer **(Customer Journey 2)**, her goal is to find a resource that can assist her in getting her work published. In their search for a leadership or communication coach, the potential clients discover Julia Mines through her website, and in both consumer journeys, reach out to see if her guidance and coaching is right for them. **(Fall Data 2020, Accessed 5/3/2021).**

During

An initial appointment is made, and Julia meets with the potential client for a session to discuss what their goals are and how he or she expects her to help them achieve these objectives. As the meetings progress, Julia is able to give more insight tailored towards their specific issues or goals. “A skilled coach should walk you through his or her process, so you have a clear idea of what to expect and how it helps reach your goals.” (**Yetter, Accessed 5/3/2021**) The end consumers’ feelings are changing at this point from discontent or possible anger to hopeful, motivated, and happy. The client, at this point, has learned information and industry secrets that will help them in their professional endeavors. The coaching sessions come to an end, and the client is free and inspired to use whatever they had learned in their sessions in practical applications.

After

The last stage in the diagrams above are the results of the “**During**” Stage. The personalized coaching starts becoming applicable in its practical applications. The client is happy with the investment that he or she had in Julia Mines, and would recommend her as a choice for anyone interested in leadership and or communication coaching. It is imperative at this point that the client be content with their service, as good reviews and positive word-of-mouth interactions have a large impact on future and returning client bases.

Business Customer Journey



The business consumer’ journey is very similar to one described, but on a larger scale because of the purchasing party being a business instead of an end consumer (individual).

In some instances, businesses and firms will send one or several of their employees that are ready for a new position, promotion and or additional responsibilities to one of these coaches for extra development. The process starts with the business realizing that the progressing employees need some work or fine tuning on their skills (dissatisfaction) “**Before**”. Smaller businesses will most likely reach out to a smaller size coach and likewise for larger institutions. Once the business reaches out to Julia, they will most likely tell her what the employee(s) needs. Once Julia begins sessions and begins honing in on their areas of weakness, the growth and value that she adds can begin taking shape. “After clarifying where a business owner would like to take their business, business coaching will help plan and prioritize what goals and strategies are needed to help progress the business closer to its goal.” (**TAB, Accessed 5/1/2021**) Julia will then work with them through the duration of their appointments.”**During**”




Once the training sessions have concluded, the individuals or individuals can incorporate these elements into their own respective organization or role “**After**”. The emotions felt in the business consumer journey are often very and stem from initial dissatisfaction, to glimmering hope, to optimistic and concluding with feelings of joy or contentment.

Buyer Persona

The Buyer Personas are also an important element of examining the Global and Local markets because it paints a very particular picture of who Julia’s clients are and who we should be focusing on as we complete the Marketing Plan. This Buyer Persona is an imaginary figure who represents the type of individual who would seek out Julia and her services. This gives us a vivid picture of the “typical” client that Julia should be targeting. We created 4 individual personas to give a holistic and complete look of the audience that Julia should work on obtaining. The characters are Michael, Jessica, Matthew and Jennifer. They are displayed in the following diagrams.

 <p>PERSONA NAME:</p>  <p>BACKGROUND Job? Career path? Family?</p>  <p>Management Professor, in her 40's, Tenured and teaches in the field of Leadership and Leading Change.</p> <p>Jennifer is a Management Professor with tenure. She has two kids and plans to stay at her university until her retirement in 20 years.</p> <p>DEMOGRAPHICS Male or female? Age? Income? Location?</p> <p>Jennifer is a female in her 40's and lives in Springfield, Massachusetts. She is in the middle income class.</p> <p>IDENTIFIERS Demeanor? Communication preferences?</p> <p>Jennifer is a professional presenter and is well accustomed to public speaking. Jennifer also prefers to meet in-person or speak over the phone.</p>	<p>Jessica, Matthew, and Michael (most popular name in the 90s)</p> <p>Michael and Jessica are both single professional graduates with 1-5 years of work experience. Michael is in finance and Jessica in the Health Sciences.</p> <p>Matthew is an Account manager at Company X and has been there for 7 years. He is currently being looked at for a promotion. He has a wife and a child on the way.</p> <p>Michael is male and Jessica is female. He is 33 and she is 27. They both live in Boston, Massachusetts and are in the lower to middle income class.</p> <p>Matthew is a male in his 30's that lives in Hartford. He is currently between the middle to high income class.</p> <p>Michael and Jessica are ambitious and eager but have little experience. This causes them to be unsure and unconfident in themselves and their abilities. They would prefer to communicate over social media or through teleconferencing.</p> <p>Matthew is knowledgeable and informed. He is comfortable in his current role but feels unprepared for a management position. He prefers to either speak on the phone or host meetings in his office.</p>
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 <p>PERSONA NAME:</p>  <p>GOALS Primary goal? Secondary goal?</p> <p>Management Professor, in her 40's, Tenured and teaches in the field of Leadership and Leading Change.</p> <p>To get her work published</p> <p>CHALLENGES Primary challenge? Secondary challenge?</p> <p>Lack of time</p> <p>WHAT CAN WE DO ... to help our persona achieve their goals? ... to help our persona overcome their challenges?</p>	<p>Jessica, Matthew, and Michael (most popular name in the 90s)</p> <p>Improve Leadership skills and better communication skills (It is a mixture from testimonials)</p> <p>Better ways of thinking strategically</p> <p>More efficient time management skills</p> <p>Feel confident assuming more responsibility at work</p> <p>To be respected at work</p> <p>Work-Life Balance</p> <p>Unable to properly communicate with peers and subordinates</p> <p>Conflict Resolution</p> <p>Making tough decisions</p> <p>Lacking confidence in current position</p> <p>I don't have the money</p> <p>Problem Solving</p> <div style="display: flex; justify-content: space-around;"> <div data-bbox="852 699 990 882">  <p>Executive Leaders for Volatile Business Environments</p> </div> <div data-bbox="1079 699 1274 861"> <p>Young Professionals Leading in Volatile Times Workshops</p>  </div> <div data-bbox="1299 829 1477 882">  </div> </div>
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 <p>PERSONA NAME:</p>  <p>REAL QUOTES About goals, challenges, etc.</p> <p>Management Professor, in her 40's, Tenured and teaches in the field of Leadership and Leading Change.</p> <p>"I really want my get my work published. It would be benefical to put some of my work out there."</p> <p>COMMON OBJECTIONS Why wouldn't they buy your product/service?</p> <p>Lack of time with classes</p>	<p>Jessica, Matthew, and Michael (most popular name in the 90s)</p> <p>Jessica: "I am really trying to get ahead in business, I am looking to make myself stand out. As I woman, I already know I am in a male dominated field". I really want to pursue a leadership role.</p> <p>Michael: "I feel like I'm educated enough to be a manager, but just don't know what to expect or do since I don't have the experience that so many of those kinds of roles require."</p> <p>Matthew: "I've worked in this field for a while and I really want to move up, but I just feel kind of unprepared for the jump from worker to manager."</p> <p>Might be a waste of money.</p> <p>The results are intangible, cannot quantify how it helps.</p> <p>It is probably going to be expensive</p> <p>I do not know how she could possibly help me.</p> <p>I might be underqualified</p> <p>I do not have the money to expend.</p> <p>I do not have the time or resources to expend.</p> <div style="text-align: right;">  </div>
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 <p>PERSONA NAME:</p> <p>MARKETING MESSAGING How should you describe your solution to your persona?</p> <p>ELEVATOR PITCH Sell your persona on your solution!</p>	<p>Jessica, Matthew, and Michael (most popular name in the 90s)</p> <p>Julia Mines is an experienced executive leadership and communication coach that can assist you with any of your needs or questions about being an effective leader and communicator.</p> <p>She is able to work with all types of experience levels and ages to provide the most value for their time and provide her clients with both an enriching experience and developed skills that will serve them well in their careers.</p> <p>Reaching out to Julia Mines would be a great idea for you, Jessica, because she is an experienced leader who has had continued success in the workforce. She is also female, so she can relate and or understand the difficulties you are experiencing and help you work through them.</p> <p>Contacting Julia Mines would be a smart move for you, Michael, because she has had the work and leadership experience that you haven't yet, so she could be a great resource. She could help you develop both your skills and leadership style to ensure you are prepared for your future role.</p> <p>Seeking coaching from Julia Mines would be advantageous for you, Matthew, because she can help work through your current role and extract all the features that you will need for your managerial career. She can help you tone your current skills and help you develop other qualities that would be crucial in becoming an effective manager.</p>
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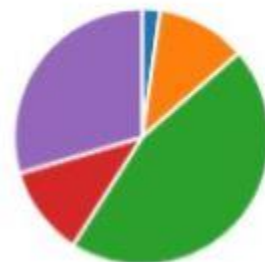
End Consumer Buyer Persona

The individual (end consumer) Buyer Persona that is seeking Julia's help is very close to what my teammates and I have devised in Diagram 2. They are not very experienced in leadership and communication and are unsure exactly what they need to work on. They are usually between the younger ages, 25-35 and we used a female in this example. We also used the example that this target has 1-5 years of relevant experience or possibly none at all. We have the data from our previous semester and survey that indicated those with fewer years of leadership experience are more likely to seek out coaching.

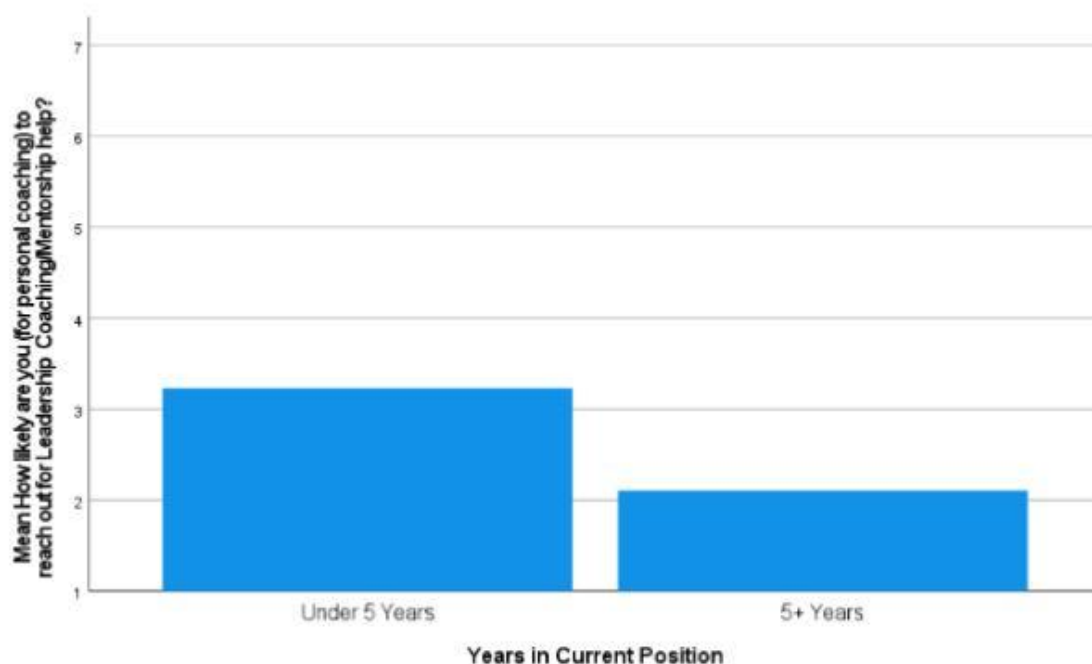
How long have you been in your current position?

[More Details](#)

[Insights](#)



(Fall Data, 2020)



(Fall Data, 2020)

While the character that my team and I developed was fictitious, it represents the average buyer or individual who is seeking coaching. These are among the most ambitious and willing to learn as well. **(Barbour, Date Accessed 5/3/2021)**

Business Consumer Buyer Persona

The Business Persona that are seeking Julia's help are small, local businesses that need specific growth in some facets or areas of their organization. They are regional and local in nature, and often have a customer or client base of the surrounding communities. They could have one or several "leaders" who are ready for a new role or additional responsibilities. It could be the owner of a local restaurant who is an accomplished cook, but has difficulty managing and leading his staff. She could be the assistant manager of a boutique but struggles with effective communication to both her workers and staff and needs to work on this before she is promoted to manager. While the majority of our Buyer Personas focused on individuals, companies like Matthew's organization might decide to send several different employees who would benefit from leadership and communication coaching.

Factors

Factors (End Consumers)

For leadership coaching in the U.S, the clients are most likely American or native born. They can come from different ethnic backgrounds, but from what we found in our research is that the majority of these individuals are white. They are often working or middle class, as funds for a leadership coach are often scarcer in poorer climates. The psychological state of the end consumer is most likely anger or discontent. They are not sure what is wrong with their current leadership or communication style, and the lack of progress if beginning to frustrate. Once they search for help, they might also be hesitant about the price and the uncertainty which often comes from a coaching service. This could cause anxiety and or hesitation towards investing their time and resources with her.

Factors (Business Consumers)

The businesses that are looking to hire Julia Mines are likely organizations that have budgets on the smaller side, but are well capitalized enough to afford this coaching and leadership development endeavors. A business will most likely adopt a pay-as-they go approach so that they can monitor and evaluate the leader's growth throughout the process. They will also examine how Julia is performing as the coach. **(Jamieson, Wall, Moore, Accessed 5/1/2021)** The decision to invest in this coaching is often made by the firm's leadership, whether that be the owners or manager.

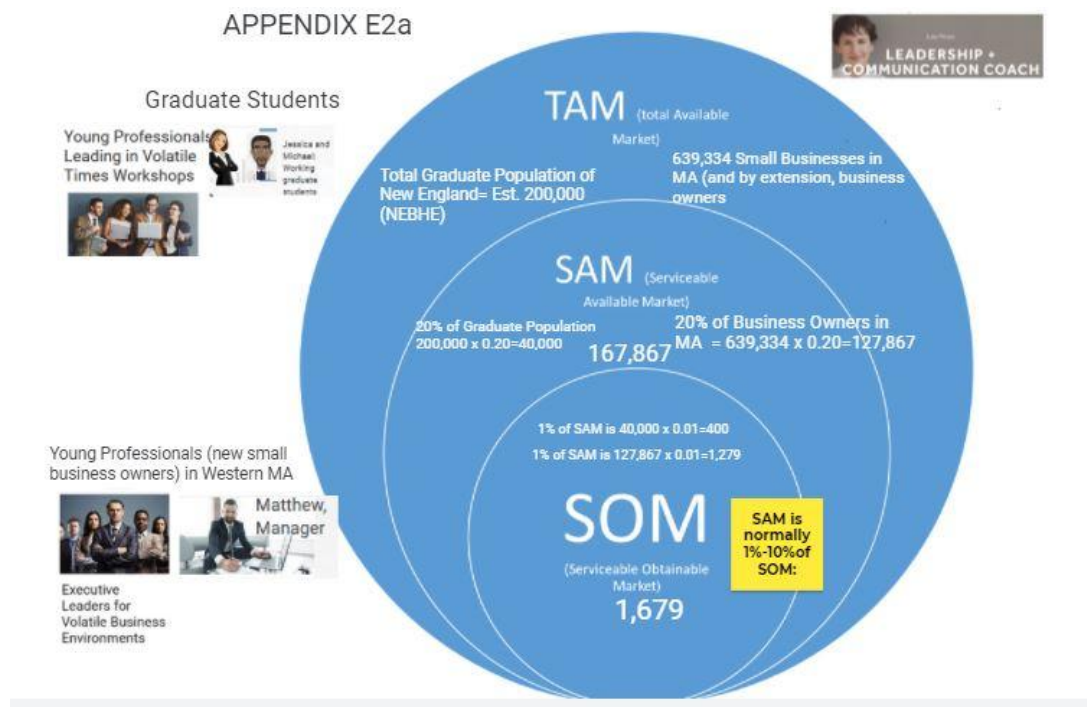
The urgency and involvement that the business holds with the coaching is dependent on the situation, as a business who is financially struggling and dependent on the results will have a great deal more personal investment than one who is just fine tuning their skills.

Best Segments

Best Segments (End Consumers)

We will now be examining the best segment for Julia's End Consumers. While this can include a great number of individuals, the team narrowed it down into two main categories, **Graduate Students** and **Young Leaders**. We determined that these two groups present the most untapped potential and serve as a key into a relatively unexplored, new market. Graduate students are already in the search to become managers and leaders in society, so investment in a coach is a plausible option. Young leaders, who we mentioned up above, are also a good segment because they are fairly new at their jobs and careers and could possibly use an experienced veteran like Julia to assist them along the way. Below is a

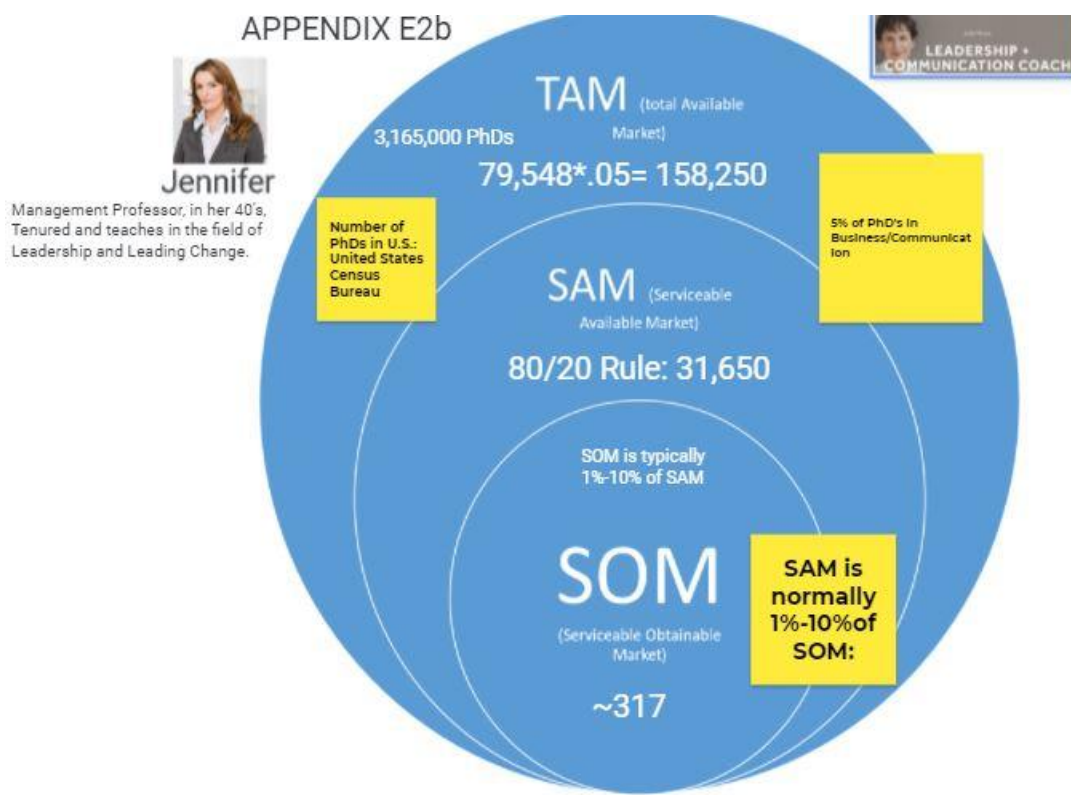
chart that shows the TAM (Total Available Market), the SAM (Serviceable Available Market) and the SOM (Serviceable Obtainable Market).



We added the SAM's of both the graduate students and young professionals to get our number of 167,867. We assumed that we could reasonably obtain between 1-10% of the SAM's which would leave a SOM of 1,679 potential clients.

Best Segments (Business Consumers)

While Julia Mines' Business clients are of course diversified, we determined that **Experienced Professionals**, especially those that **work for or own small and local companies**, are the best segment. As my peers and I have mentioned in previous reports, local businesses who need progression of their employees or owners have been a stable segment for Julia, and we believe she should retain and expand on this market. Small business prefers to work with other small businesses, and as we mentioned before, larger companies are often not interested in looking into businesses such as Julia Mines and often go for bigger options.



Current Positioning & Mapping

Current Positioning & Mapping (End Consumers)

We will now be looking at the current Positioning & Mapping of Julia Mines' End Consumers. As we know, Julia Mines is located in the Northeast, so her current positioning is a small player in a saturated "leadership" coaching market in the region (IBIS World, Accessed 5/3/2021). We also know that the bulk of her current clients are individuals with more experience, so we want to work on developing a next client base on those who are inexperienced. We determined in the "Best Segments" part of this contribution that **Graduate Students** and **Young Professionals** are an untapped market that could greatly profit Julia. Right now, she is lacking this group and to add diversity to her client book, she should consider marketing and creating promotions directed at this demographic. My team and I have been devising ideas such as webinars, workshops, events, and information sessions that would help bring in this target demographic. The entire graduate population of the New England area is an estimated 200,000 individuals while there are 639,334 small businesses located in Massachusetts (NEBHE, Accessed 5/3/2021). (TAM). To create our (SAM), we used the popular 80/20 rule which reduced these numbers to 20% of their initial

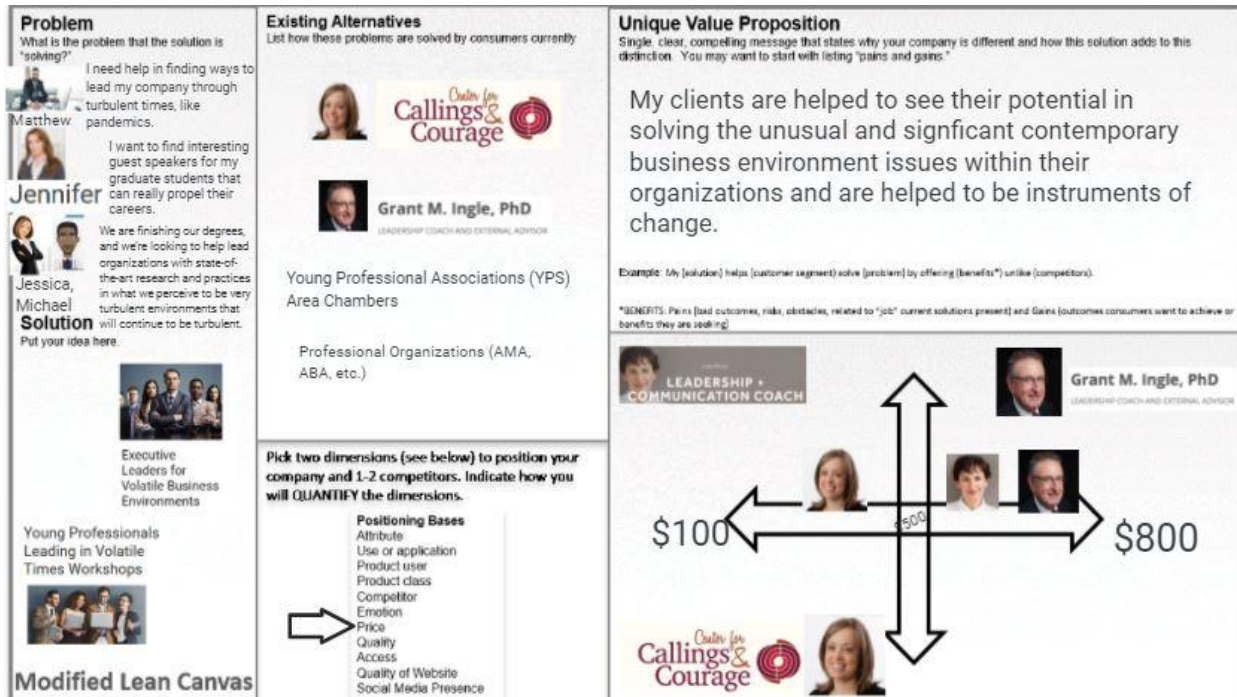
values. This left us with 167,867. To find our final number, (SOM), we took 1% of this number to get 1,679. These are the number of clients that we believe Julia has the reach and capacity to obtain. We believe this to be a substantial market to pursue.

Current Positioning & Mapping (Business Consumers)

Finally, we used the example of Jennifer to create an additional TAM/SAM/SOM. We used the popular 80/20 rule to achieve our SAM after taking the 5% of PhD's in the U.S that specialize in Business/Communication. This reduced our number to 31,650. We then took 1% of this number to receive our SOM which the team believes is the achievable Serviceable Obtainable Market. The final number we got was 317 prospective clients. After comparing the two, it is clear that the young professionals and graduates are a more substantial and plentiful market.

Modified Lean Canvas

This section will focus on this chart which allows Julia to see the problems of the Buyer Personas as well as discuss our new ideas.



Clients Local and Global Market/STP

Revenue Generation and Access

Supporting Strategies

A. Value Proposition

Elements of Value

Julia Mines is a leadership and communication coach who is known for her work with executives and leaders in their prospective fields by helping them advance their professional careers. As a team, we looked at the numerous ways that Julia added value to its customers. To do this we used the elements of the value pyramid, broken down into four kinds of needs which are: functional, emotional, life-changing, and social impact (Bain & Company Insights, 2015). Several elements show how Julia Mines adds value to its consumers. We start with self-transcendence which is part of the highest level of the pyramid and focuses on helping other people or society more broadly (Bain & Company Insights, 2015). Julia provides this for her clients by providing them with the necessary tools to set up professional and personal goals to gain clarity in their work and life. The next elements that add value to Julia's work with her clients are: provides hope, self-actualization, and motivation. These elements are reinforced by her current coaching techniques and we have seen how she has made a difference in the lives of her clients through their testimonials; Ellie Stavoulaki a Professor of Economics at Bentley College, "Julia is an amazing coach. She has been extremely helpful in multiple areas of my life. She helped me navigate and resolve a tough and complex career-related decision, and has inspired me to keep going with my personal and professional goals. She is gentle and compassionate and brings so much honesty and integrity to our sessions. I wholeheartedly recommend her as a coach." (Mines, 2021).

We have discussed the two highest levels of the pyramid so far and now we will look at the bottom needs which are functional and emotional. As a coach, Julia provides her clients a variety of services with different focuses and that goes on to prove how she grants values to her consumers through her work. Elements that made her offerings functional to her clientele were simplified, makes money, integrates, quality, and variety (Bain & Company Insights, 2015). Through her work, Julia provides her customers with a reduction of the complexity of their position; helps them make money through gaining promotions; allows them to balance their personal and professional life; provides high-quality service through the creation of individual connections; and provides them with the variety of services and focuses. While providing them with functionality is important, there are emotional elements that Julia does provide to her customers such as rewards and reduces anxiety (Bain & Company Insights, 2015). Our team conducted research this year that

supported the data that we gathered in the Fall of 2020, which showed that younger respondents who feel more promotable have a higher inclination to reach out and contact leadership and communication coaches (Fall Data, 2020). With the support of this data, we can see how Julia's services will reward her clientele by providing them with promotions which will lead to other elements of value we have mentioned above. Along with that Julia provides her clientele with clarity and that is something that provides them with an anxiety reduction. Julia does this by focusing all of her attention and tools on the clients that she is working with or for.

Core/Value-Added Components

The Elements of Value Pyramid

Products and services deliver fundamental elements of value that address four kinds of needs: functional, emotional, life changing, and social impact. In general, the more elements provided, the greater customers' loyalty and the higher the company's sustained revenue growth.

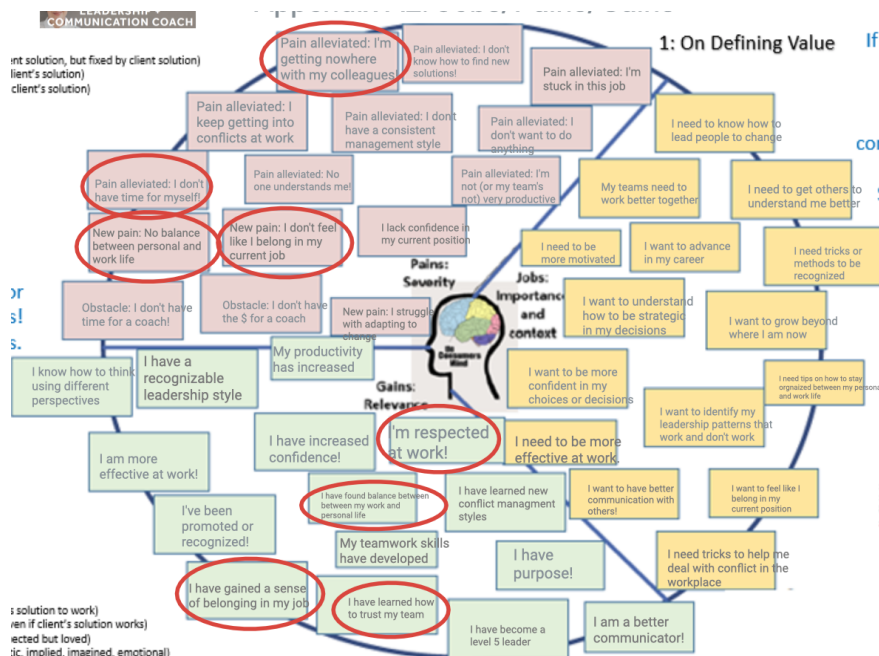


As mentioned above, through our work as a team we have discovered that Julia Mines's current offerings do cover several elements of the value pyramid, however, there are still several elements that have not been covered. Throughout our semester we have established two new offerings for Julia, that we as a team wanted to recommend she start pursuing which are Executive Leaders for Volatile Business Environment and Young Professionals Leading in Volatile Times Workshops. These two new offerings add new value elements as well as reinforce current ones we have already discussed

above (Bain & Company Insights, 2015). The new offerings will bring in these current value elements which are affiliation/belonging, wellness, organizes, and connections. The two new

offerings while covering two different clientele segmentations have the same objective in mind which is providing individuals with the necessary resources during periods of change in the business environment. These volatile work environments are something we have been experiencing for the past year. Many professional careers have been impacted by COVID and so have people's affiliation and belonging within their companies. According to Harvard Business Review, "Loneliness is one of the most common complaints about remote work, with employees missing the informal social interaction of an office setting" (Larson, 2020). Along with that isolation and loneliness will lead to employees feeling less "belonging" in their organization (Larson, 2020). Unlike many others in her field, Julia's offering of these workshops that focus on volatile work environments will create an addition to the elements of value she offers to her consumers. The topics that will be covered throughout these workshops will provide mental wellness by offering the participants by teaching them different methods of communication in an online environment (Larson, 2020). Along with offering a sense of belonging to the participants, Julia will allow them to create those connections with their co-workers and superiors. On top of providing her clients with the necessary tools and resources for them to feel connected and affiliated in the workplace and providing them with methods to practice mental wellness, Julia will provide them with the necessary skills to adapt and organize their goals in a manner that is beneficial for their personal and professional lives.

Jobs to be Done/Pain



There is a good amount of information that people need so they feel that there is value-added to their experience with Julia. Our team has used Jobs / Pains / Gains diagram that comes from Osterwalder A, Pigneur Y, Bernarda, Smith A, Papdacos T (2015) Value PropositionDesign, Hoboken, NJ: Wiley. When an executive or

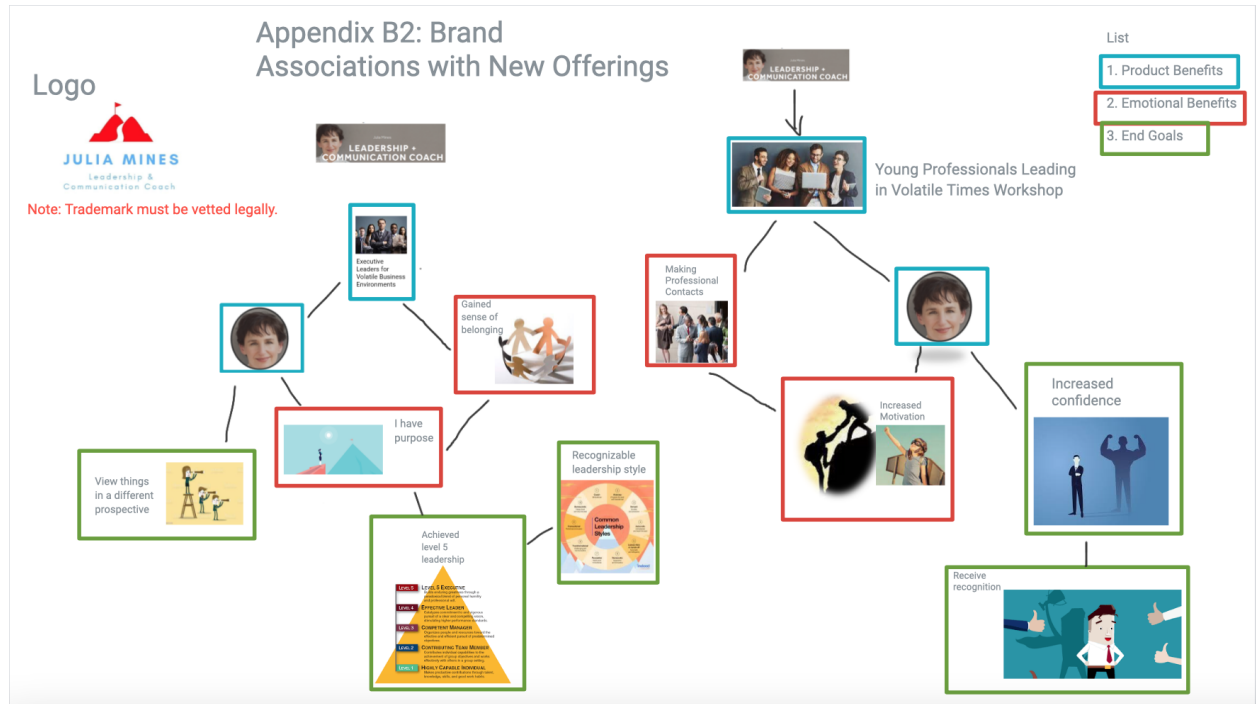
leaders in their prospective field is thinking of contacting a leadership or communication coach there is a reason for that and those are defined as jobs to be done. Our team was able to define several jobs, however, some that we feel would be impactful for our new offerings are needing to get tips on how to stay organized between one's personal and work life as well as learning how to lead people through periods of change. Changed to a work environment will cause executives and employees to struggle with feeling a sense of belonging in their job because of the changes that they are experiencing. Along with that, they will have to learn how to find the balance between their personal and professional life while making sure that they are focusing and taking time for themselves. Lastly, they will struggle with making those connections because of the changes that they are experiencing and will feel as if they are not getting anywhere with their colleagues. If the new offerings of Executive Leaders for Volatile Business Environment and Young Professionals Leading in Volatile Times Workshops are adapted by Julia the pains that have been mentioned above will be alleviated and individuals will expect gains. Those gains will vary but they will mainly focus on creating an environment of belonging for the executives and employees. Along with that they will feel respected in their position, will learn how to trust their team during volatile times. One of the main gains that will be expected by reaching out to Julia will be finding the balance between one's personal and professional life.

B. Offering Mix

Relationship to Client's Current Offering Mix

The new client offerings are similar to what Julia is already offering. Our team has focused on exploring the creation of more offerings that focus on workshopping for their clientele. Julia already offers a variety of services and while we as a team believe that they are very beneficial we felt that combining some of them would provide clients with more resources and tools; these new offerings are also an easy way for new clients to get a feel if a leadership and communication coach is the way to go. Executive Leaders for Volatile Business Environment has a focus on working with executives on an individual basis. These services will allow them to learn how to navigate changes in their position, work environment, communication, teamwork, and many more. There are no other coaches there who offer such a service and in the current environment that we have found ourselves in is crucial to be able to have the necessary skills that overcome such a situation or learn to adapt to it. On the other hand Young Professionals Leading in Volatile Times Workshops while covering the same information, it is targeting a different consumer segmentation. This workshop is allowing graduates students or recent graduates who are entering the business world. We have seen the effects of COVID on the business world, especially young professionals who are looking to find a job. Many who graduated as soon as COVID hit, were unable to find employment or lost their position because of changes that businesses

had to make. Companies kept away from hiring inexperienced employees because they did not have the luxury to train any new members. The new offering will be already getting the graduates some sort of experience in dealing with the major changes within the business world but also how to navigate those in a company. Our team feels that the adaptation of these new offerings by Julia would not only gain her more attraction by a new clientele but it would set her apart from her competitors.



Client's Overall Strategy

The Executive Leaders for Volatile Business Environment and Young Professionals Leading in Volatile Times Workshops would fall under a breadth strategy. This strategy focuses on being broad in scope because we are offering several different types of service under one roof. This is what we are doing with the new offerings that we have created for Julia. Both the executive and young professional offerings are not new innovative ideas but they are additions to the already existing offerings that Julia has. These supplemental services cover a different scope that leadership and communication coach can explore, and as mentioned above this is very different from any other offerings from competitors.

Quality Control Issues

Julia Mines does not offer a tangible product, she offers a service as a leadership and communication coach, and because of that for us to measure the service quality of her practice, we need to use RATER, a method to measure service quality (Parasuraman, 1988). RATER is broken down into the following characteristics which are reliability, assurance,

tangibles, empathy, and responsiveness. Firstly, we will be looking at reliability which is the ability to perform a service dependably, accurately, and consistently (Parasuraman, 1988). In Julia's case, we see that she can perform her services meticulously while making sure that her clients are comfortable in opening up to her. Secondly, we will look over the assurance characteristic which is the knowledge and courtesy of employees and their ability to convey trust (Parasuraman, 1988). Again, we see how Julia has been able to gain her client's trust through the testimonials that have been shared on her website. She has been able to be present for them throughout the sessions and allowed herself to be fully focused on making sure their needs are met. Thirdly, we are looking at the tangible characteristic and in this case, it will be physical pieces of evidence of the services (Parasuraman, 1988). We have discussed the different ways that Julia's services provide value to the consumer but to just summarize it in a few words it is the social, functional, emotional, and life-changing elements that her services provide. Fourthly, we have empathy which shows the caring individualized attention that one has towards their customers (Parasuraman, 1988). We are repeating ourselves quite often but again Julia's method of coach focuses on making sure that individuals' needs are met throughout their sessions with her. Lastly, we have responsiveness which is the characteristic of providing prompt service (Parasuraman, 1988). This is done by Julia in how she contacts and interacts with her clients. She offers newsletter sign up on her website as well as a method for any new or current clients to reach out to her.

Value Support of Revenue Generation and Market Access

Introduction:

This portion of the Julia Mines marketing report contains information regarding the areas where the team believes Julia has the most potential to broaden her current offering and generate additional revenue for her business. Our findings have been organized accordingly in the infographic below using our latest research:

Key Costs & Demands:

Every business is subject to certain costs that are necessary for them to operate properly. These costs are organized into two categories: fixed costs and variable costs.

Fixed costs are recurring business expenses such as rent, utilities, etc. For Julia, the terms of her fixed costs are a bit different due to the fact that her business is run from home. As seen in the infographic, the team did their best to narrow down Julia's assumed fixed costs to better reflect the nature of her business. These costs include the following: personal salary, home office maintenance, internet access, cellular access (phone), website maintenance

costs, and Zoom subscription. It is evident that all of these expenses are necessary for Julia to conduct her daily business. Assuming she has already selected the billing plans that best fit her budget, Julia has this area covered.

A *variable cost* is a business expense that changes in proportion to production output (Kenton). Again, this area presents itself a bit differently because of the nature of Julia's business. There is no tangible production output in her case, only the output of her own time and resources towards her clients. For this reason, the teams determined variable costs were slim. These costs include data usage and travel costs. Another potential variable cost would arise should Julia decide to pursue professional video production as we have previously discussed. This cost however would be viewed more as a sunk cost due to the time that would be lost in the process of recording the videos. Julia's time directly translates to money, so we have to take this into account when weighing the pros and cons. These are all important factors to consider when aiming to generate increased company revenue because revenue generation is not just about sales, it's also significantly affected by the business expenses we have just discussed.

In terms of *demand*, it appears as though the per-session pricing of the leadership coaching industry is generally quite elastic. As the team has previously pointed out, the industry that Julia Mines fits into is already saturated with other available coaches. For this reason, it is important for Julia to maintain her ability to adjust her prices to remain competitive in her market whenever it is needed. Using the TAM/SAM/SOM approach (Total Achievable Market/ Serviceable Available Market/Serviceable Obtainable Market), the team was able to narrow down the demand for Julia's services regarding our new offerings. On the graduate side, the team was able to determine that the TAM was roughly 200,000 individuals while the SAM narrowed down to about 40,000 and the SOM landed at 400 total in Julia's serviceable obtainable market. In terms of professional leadership in volatile times, the TAM was found to be a much larger 639,334 individuals while the SAM came in at about 127,867 and the total serviceable obtainable market for the demographic landed at 1,279. This leaves Julia with a total of 1,679 obtainable new clients with the new offerings. In other words, the demand is very clearly there.

New Offerings and Market Strategy Choice:

Our marketing team has strategically defined two new potential offerings that we believe will prove very effective in helping Julia expand her reach in the coaching industry. Both offerings are *revenue-oriented* strategies much like the rest of Julia's current offering. Revenue-oriented strategies focus on increasing income by maximizing both short and long-term sales potential (Willis). Our latest research has piqued the teams interested in the college student/young professional demographic. The reason for this being that young individuals these days endure quite a bit of emotional distress, especially those who have

just graduated. The lingering pandemic has only made these issues worse for many. The sad truth of the matter is that the likelihood of struggling young individuals to go out of their way to seek 3rd party help such as Julia's in these situations is quite low across the board. The next two sections will break down the logistics of each of our new potential offerings along with why the team believes they will be successful in generating revenue for Julia Mines.

Offering 1:

The team's first offering is something we like to call the "Young Professionals Leading in Volatile Times Workshop". This workshop would be aimed towards recently graduated students in an attempt to offer a hand of guidance regarding their transition to the workforce. This is a very scary time that leaves many individuals feeling helpless and lost. In other words, this is a perfect area for Julia to change some lives with her services. As a coach with years of experience in both business and individual coaching, Julia holds quite a bit of valuable insight that could be useful to this struggling demographic. The idea is that Julia would develop this workshop, consisting of multiple sessions, that would cover a wide array of topics pertaining to varying areas of leadership along with topics of personal development, stress alleviation, etc. Using techniques such as the FOCUS acronym (Zweibel) that was previously mentioned, Julia can use her experience to offer insight in the areas where individuals enrolled in the workshop find themselves lacking. Being able to analyze and approach/improve said areas accordingly is something the team believes Julia will be able to do well. In summation, this workshop would greatly benefit young professionals in many ways. It would also provide Julia with a much earlier exposure on her potential future target market. Meaning that if the young individuals find value in this new workshop that's offered to them, the chance they return in the future and/or refer you to others grows tremendously. Since the majority of Julia's current client base ranges between the ages of 30-50, this would put her name in the heads of people who might use her services almost 10 years ahead of schedule!

Offering 2:

The team's second offering is a one-on-one "Executive Leaders in Volatile Business Environments" coaching session. This session would be aimed towards the leaders/executives of businesses with the goal of helping them effectively navigate the rapidly changing environment in which they are working in. It is needless to say that recent events such as the pandemic have caused for some drastic changes. The workshop would emphasize techniques of communication, organization, and other collaborative aspects that

goes into effectively running a business in these volatile times. The team was unable to find any other service of the sort, so not only would this be a great new venture, but Julia would be the spearhead as well.

Pricing Strategy and Revenue Potential:

For Julia's pricing strategy it is pretty obvious to stick to the same system, that being professional services pricing. This pricing strategy is based on both Julia's experience and her credentials. The team had a bit of trouble finding a concrete price point for one meeting with Julia, so we had to do a bit of estimating. As far as overall available time, the team made the following estimate:

[40 (hours) per week * 52 (weeks) in a year] – [vacation (3-5 weeks), sick time (5-10 days)]
= on average ~ 240 hours. This leaves her about **1,840 hours** roughly, annually

For a starting price point on individual sessions, Julia could do payments by session at around \$100-\$150 each. She could also potentially do a monthly system instead for \$350-\$400/mo. The second option (monthly) is recommended by most outside sources for individual coaching sessions as it spreads out time resources for coaches will also giving them longer term commitments from their clients. For our other offering, Julia can offer a select number of spots for a 2–4-week group workshop for a price of around \$200-300\$ per person. These workshops could be held multiple times a year with about 30-40 spots available for each workshop. For example, if Julia were to hold four of these new workshops in a year (1.5 hours, 3 days a week, 35 people paying \$250 each), she would make close to \$10,000 each workshop.

Identification of Channels: (Market Access, Push/Pull Focus, Assisting Tech.)

In the coaching industry, much if not all of the selling done by coaches is done directly to their clients rather than through the use of intermediaries. This is because consumers typically find people like Julia and her competitors in times where they are considering seeking help from different coaches in the area. As a result, the pull approach is pretty much the universal go-to for coaches alike. As the team has mentioned before, Julia is in quite a saturated industry. This leaves a crucial level of importance on her first impression towards potential new clients. During an individual's search of coaches in the area there needs to be the deciding factor that sets Julia aside from her competition. This can be done through many different ways, such as: website accessibility, response time to an inquiry, etc.

As a coach, the way she treats her clients is even more important than that of a regular business. Julia should serve as a source of insight and helpfulness for her clients. It is important that she values her clients time just as much as they value hers, but also that she delegates her time equally amongst her clients. We want to make sure that every single client is getting the best Julia possible to avoid any issues or lost clients.

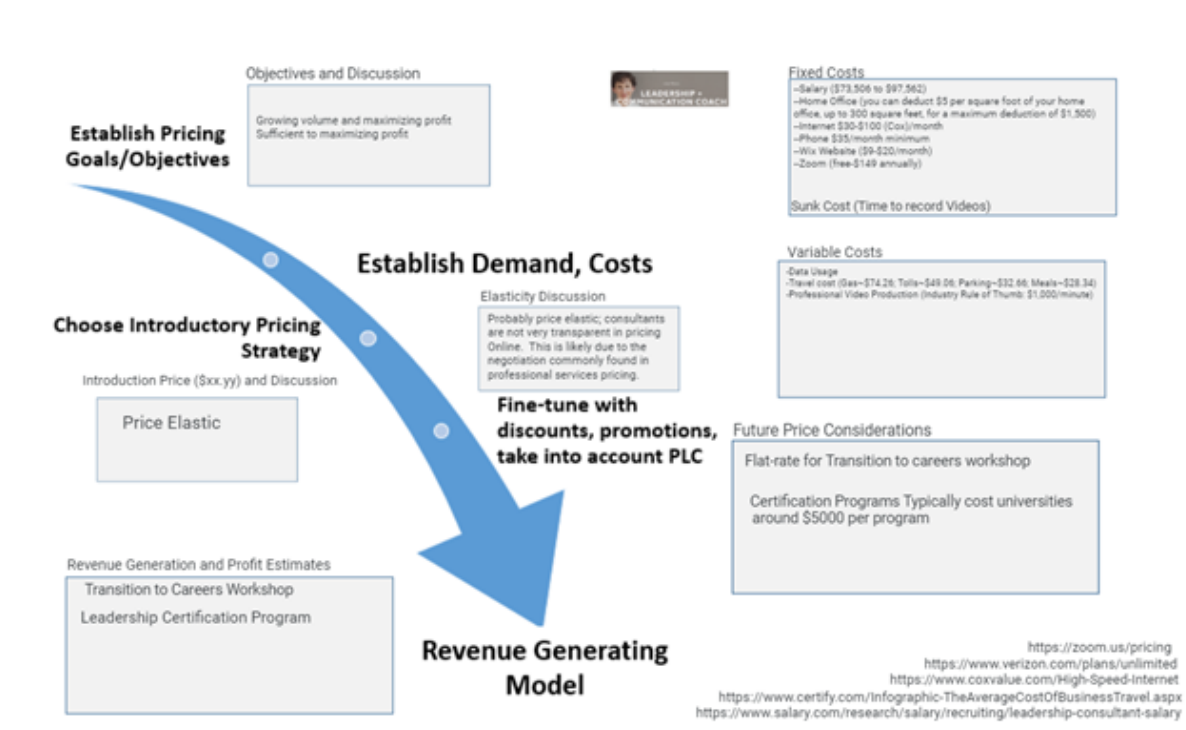
Another note that the team wanted to point out was the structure of the Julia Mines website when accessed from a mobile device. It appears that some work has been done to alter the website when a person accesses it from their mobile device (text and buttons change size to fit the screen). However, almost Julia's entire body is completely cut out of the frame leaving those accessing the site not knowing what they are looking at. This should be a simple fix that Julia can adjust easily. That said, it is important that she actually takes the steps to adjust this seeing as her website is her main assisting technology in conducting her everyday business. Even an issue this small could be the deciding factor between whether or not a potential client chose to pursue business with her or a competitor.

Positioning Discussion

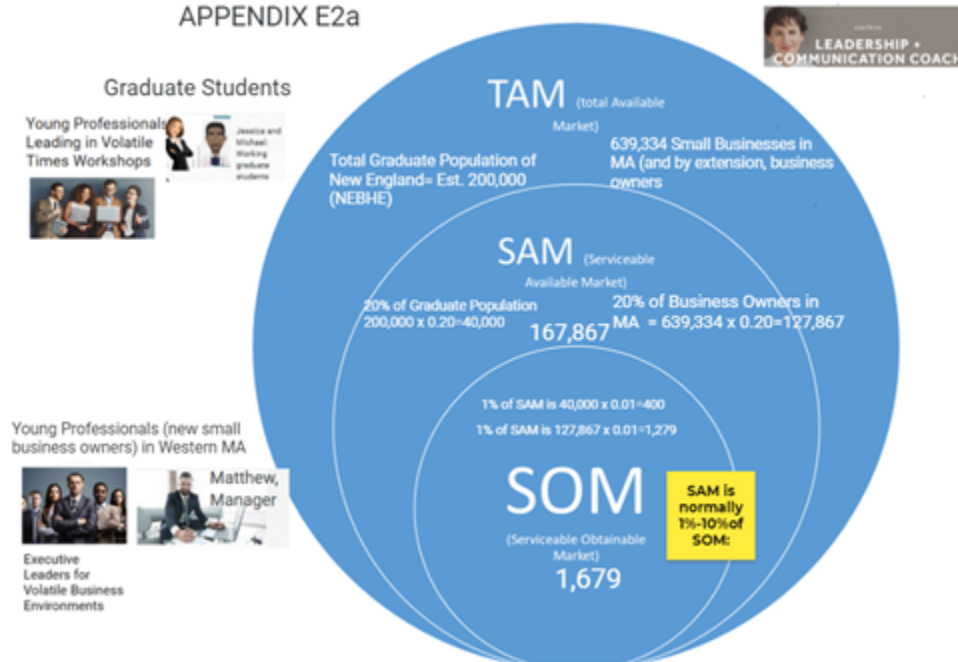
Despite the fact that Julia remains in a saturated industry with multiple local competitors, both her personal output and the reviews she receives reflect the fact that she provides excellent work for her clients. Today, checking google reviews is a go-to for consumers who are taking the first steps in deciding whether to give a business the time of day or not. Another aspect of Julia Mines that provides an edge is her versatility. She offers both personal and business services which is uncommon amongst other coaches in the area. With our new offerings that take a swing at attacking volatile business environments, the team believes Julia Mines will soar past their competitors.

References:

2021 Data:



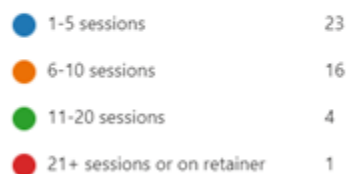
APPENDIX E2a



2020 Mines Data:

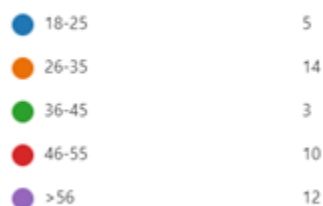
12. How many leadership sessions would you expect should be sufficient to help AN INDIVIDUAL who needs Leadership Coaching/Mentoring?

[More Details](#)



29. In what age group do you place yourself?

[More Details](#)



Advertising

As covered by previous team members, targeting recent college graduates or young professionals will be beneficial to Julia Mines business and personal brand in the long run. Those who are recently out of college or just getting started in their careers can be targeted through specific advertisements geared towards younger people. We have also discussed how Julia will benefit from larger group sessions or workshops. Both of these groups can be targeted with some tweaking to Julia's current advertisement strategy, which is what I will be discussing in this section.

There are a few different components that make up a facebook ad, which are as follows; the image or video which is what captures the viewers attention is arguably the most important thing because if the image does not grab the attention of the reader, nothing else on the ad will even be read. Next is the text, which will be right above the image, this is where more context is given. After this is the headline, which is meant to be short and catchy, so something like Julia's mission statement can go here. Lastly, is the call to action. There should be a link here to fill out the form to set up a meeting, or get more information

on Julia's website. Once these elements are completed there are more details to consider such as what should be included on each of these aspects. Refer to appendix K.

Another old fashioned but simple way to advertise to college students is through flyers. Not as much this year due to many classes being online so less time spent in the academic buildings, but in a normal non-pandemic year, students spend time in these academic buildings whose hallways are filled with bulletin boards. These bulletin boards are all over the campus and can be a valuable place to advertise something to students. A modern twist on the same idea at a college could be utilizing University Posts. All WNE students are familiar with this, and I would assume most colleges and universities all have a similar way to get information across to students. At Western New England, it is a daily email that goes out summing up any important upcoming events, or things students should be aware of. The University Posts dashboard runs down the Kodiak homepage making it impossible to miss. Each of these posts has an attention grabbing title.

As an honorable mention, I would also like to throw out the website LinkedIn. LinkedIn is an integral part of every business person's social media. When looking for jobs this is the place that many turn to look. LinkedIn is also the most common place for networking. This is the place to showcase how great you are as a professional. Julia does have a LinkedIn, and although she is not very active on it she does have an impressive amount of connections which means if she does become more active in her posting, many people will see it on their timelines. So having some posts on here highlighting her services would be a wise choice. There are also ways to run ad campaigns on here, but a good start would just be posting an informational post about her offerings, and people who are happy customers can share her posts to their own networks, and that is the modern day, even more efficient, word of mouth.

Using data from last semester's survey, we concluded that those with less years of experience are more likely to reach out to a leadership coach. This could be for a few reasons such as hoping to get a head start at a young age. Another finding from last semester's research is that those who have self perception of upward mobility, or in other words, feel like they are promotable are more likely to reach out for coaching to help them reach these next steps. This is more supporting evidence that proves how advantageous it will be for Julia to pursue the direction of young adults.

Public Relations

Public Relations goes a bit deeper than regular advertising. Some people only see PR as a large company or corporation's concern, however small businesses also benefit from good PR. Public relations is the organic way that the public perceives a company, or in this case, Julia Mines as a coach/mentor. Her website does a satisfactory job at setting the tone

of her business and what she offers. Having good public relations is directly correlated with having credibility, something very important in Julia's industry. As a small business, Public relations can be a make or break factor in whether or not someone decides to be our client or not. Having good reviews online, and having solid third party reviews is one way that Julia shows off the satisfied tone of her clients. On Julia's website there is a section dedicated to testimonials, this is valuable, but should be taken with a grain of salt. These are on her own website which means these testimonials were hand selected by the owner of the brand, like any company, you need to dig deeper to see the authentic reaction she has online. With a quick Google search, you can see her reviews are very limited, there are only two reviews on google. However the good news is that they are both five stars. To really stand out in the realm of PR, she needs more reviews and recognition on google because this is the first thing people see on the right hand side of the google search results when you search her name.

On top of this, she is not very active on her social media in general, for example, she has only posted three times in 2021, and before that she had not posted since 2019, where there was one post, and nothing else on her facebook page. Young people love to see a social media presence from the people and brands they do business with, it makes the brand seem more reliable. Seeing the brand as a whole is important. The better news is on LinkedIn she does have more reviews from clients which all rave about her. As mentioned, LinkedIn is an important space to be in when targeting young professionals, and Julia should try to capitalize off her hundreds of connections on here.

Direct Selling

As far as direct selling goes for Julia Mines, this is currently how her business operates. There is no middleman in her business model. Julia Mines is technically the "manufacturer" of her product which is her services/ herself. The customer or client gets her services directly from the source. An important part of direct selling is building that relationship first with the client or customer, then making the sale. It is crucial for a relationship to form between a sales person and their clients no matter what is being sold, but it is integral for Julia to have that mutual trust between her and her client for her coaching to be successful.

Personal selling

Personal selling is a sales strategy where sales are made face to face. In today's pandemic society it is hard to meet anyone face to face, nevermind every one of your sales leads. Even prior to the Covid-19 pandemic personal selling is a time consuming and challenging concept. It is important to dictate who is worth taking that time out of the day to

talk to and really invest time into. Taking time on the right leads will be most rewarding. After consideration and deciding to target young professionals and recent college graduates, Julia Mines should consider spending more time, personal selling to these individuals. Face to face meetings seem to be a thing of the past, so personal selling can be done through a Zoom or other conference call software. When meeting with these people she should ask herself what the value is in this client, in more straightforward terms, will this client meeting be worth her time, or is there another more valuable lead that could be pursued?

Sales Promotions

Julia Mines has not run any sales promotions to my knowledge. This could be intentional but when working with soon to be college graduates or even recent college graduates, money can be tight due to student loans or other factors. Although Julia Mines services are very valuable, having some sort of sales promotion may be better in the long run. A lower price may bring in more young clients. A suggestion may be offering a special price for those people who are recent college graduates. This brings back up the point that sacrificing a small amount at first may end up bringing in the higher revenue in the long run, like an investment. Targeting their professionals right as they enter the workforce and setting up that connection is likely to bring them back to you in the future as they advance through their career. If it's not them returning, it may be one of their colleagues after being referred to Julia by her original client. As we have established throughout this report, Julia is in a pretty saturated market, and offering a sales promotion to recent college grads will bring more of these young clients to her rather than a competitor, and then in turn stick with her throughout their professional lifecycle.

Messaging

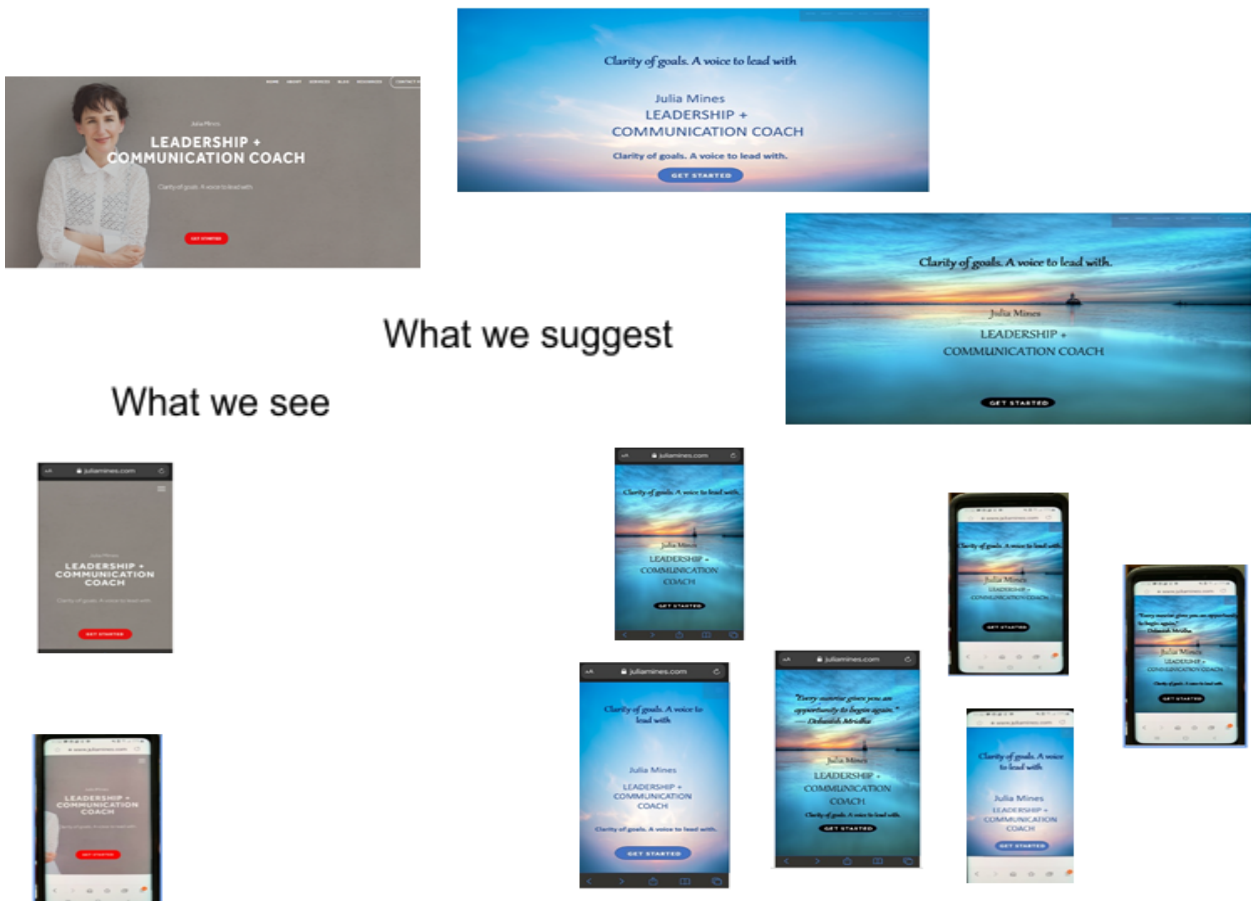
Digital Marketing

This section of the marketing plan will continue to look at promotion of our Client, Julia Mines. It will be looking at Digital marketing which includes website, mobile and content marketing and finally we will look at after-sale strategies that our client, Julia Mines can do to keep connected with her clientele and future clients.

As we have looked at in previous sections of the plan, our group is focusing on two types of strategies. One is the pull, which is ideally focused on the one-to-one sessions with Julia and the typical market would be those younger professionals who need a coach, it could be they have just finished their graduate degree and they need guidance to lead. The push strategy is looking at targeting Management and Leadership Professors that can help get Julia access as

a guest speaker on campuses. Ideally as a group we have noted that we would like to see Julia use more Digital Marketing when it comes to the push strategy just because most professionals are going to want to reach out to her through her website. In terms of the strategies, the example that our group decided on was pretty similar for both the push and pull when it comes to the website and mobile marketing.

In looking at Julia Mines website there are a few suggestions and ideas that our team has thought about. We will first go through and talk about what we see on the website and then go in detail of what we would like to see. For example, the website utilizes call to action when clients first access the website, particularly we see this with the “Get Started” button which gets clients to fill out a form on who they are and if they would meet with Julia. After looking at articles and different best practices, HubSpot defines call to action as “it’s part of a webpage, advertisement or piece of content that encourages the audience to do something” (Leaning, 2020). Julia already utilizes this tool so this will already get clients to interact with her and connect with her. Another aspect of the website that we wanted to focus on as a group was the homepage, as of now Julia has a homepage that introduces clients to who she is and what she offers. Based on website design best practices from Quick Sprout, they say that a good optimization for mobile design is really important especially when it comes to being mobile friendly. So as a group we noted that the homepage on a computer, on an iPhone and on an android is ideally different and not proportional when it comes to the Portrait of Julia. We wanted to make sure the homepage format would be mobile friendly, so we decided to go with a few options. For example, we decided that a sunset photo that has a background color of blue would fit best as we identified that blue was used on the website. We also looked at research that had suggested what the color blue means, and they said “in color psychology, blue’s color meaning ties closely to the sea and the sky. Stability, harmony, peace, calm and trust are just some of the feeling that your customer may feel about your brand” (Oberlo 2019). That being said, it is also a vivid color which can help attract more clients to the website. Lastly, we looked at suggestions regarding layout and we thought either a quote that resonates with the idea of new beginnings and crossing challenges or using Julia’s tagline “Clarity of goals. A voice to lead with” would be an alternative way to get more clients interested in her services. We have formulated a few examples of what Julia can offer on her website and on her mobile phone.



Website and Mobile Marketing

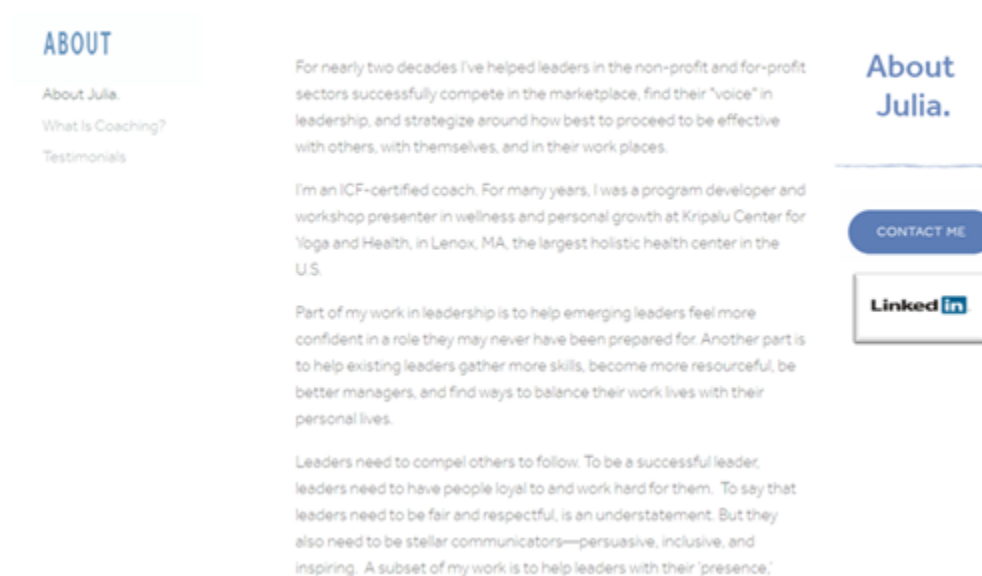
Those were some suggestions that we were thinking about adding to the website. The pictures above outline what the format and design of the newly developed idea looks on a phone including apple and android as well as on a pc. While looking at some best practices for web Design tips one of the tips that Torque magazine had mentioned was something Julia already does well, it was Hick's Law which states "that the more choices an individual has, the longer they will take to make a decision"(Schäferhoff 2018). Julia has a set of services contributed to those who want to participate in a bootcamp, workshop and then

those who want to have one on one meetings. Another tip they suggested was that compressing information in a website that utilizes more scrolling than clicking can get conversions up by 30%. Consumers are more likely going to scroll to get information about a service than they will be clicking. That's one suggestion we would consider looking at, Julia utilizes scrolling, but it might make the website easier for clients to access if there were scrolling than clicking. Another tip that Torque Magazine suggested was using people in pictures, we suggest possibly adding pictures of some clients or pictures of a bootcamp event that took place. Ideally, these could possibly go in the testimonials webpage of the website and the bootcamp picture could show up on the side of the webpage. This can help attract clients who want to get a feel from what some of the services look like and creates awareness about your services. Another tip that they recommend is "using the right list order" which looks at where certain items are on a list, for example subheadings that are listed first and last are more likely to be remembered by clients than those in the middle. As a group we suggest taking that into consideration as it can attract clients to look at certain information instead of other ones. This is important because it makes information more accessible. The last tip that was the magazine had suggested was growing social shares, media mentions and getting in more testimonials. LinkedIn is a great platform that can be used to share out a few tips on leadership and other related topics. In another section, one of my group members talks about Facebook advertising which can help promote her services, that's also another suggestion that we think can help grow social shares.

LinkedIn

Another important suggestion that we thought would promote Julia's business would be if she added her LinkedIn to her about page on her webpage. After looking at articles and specifically one from the Business Journals they say that "from giving coaches and consultants a ready-made, inbound lead generation source via its freelance marketplace, to an improved blogging and analytical experience, LinkedIn continues to make it easy to find, engage and connect with potential clients on the platform" (Nemo, 2017). Ideally, if Julia adds her LinkedIn this will allow clients to connect with her and she can connect with them if she would like. This would help build clientele connections along the way with those who decide to talk to Julia. Some best practices that we looked into from Hootsuite suggested including some of the criteria on the about page in terms of offering and services, incorporating what some of the values are for your business. Updating profile banners can attract clients, we decided to make the background color blue to match the webpage. Lastly, posting or resharing articles that can motivate/inspire those in leadership positions (Baird 2018). We also came up with a few "how to" article titles that can be written and posted on

LinkedIn. Those Suggestions include : "How to stay connected while working at home", "How to maintain communication skills while working remote" and "Tips on how to work effectively in a hybrid environment". Some of these articles can help attract clients into learning more about these subjects. Color is another factor that we think is important, we suggested that the side headings be in blue instead of red since blue is already incorporated on the website and it would compliment the homepage. As mentioned previously, the color blue symbolizes harmony, peace, and trust so we think this would be perfect for the website headings as well.





YouTube

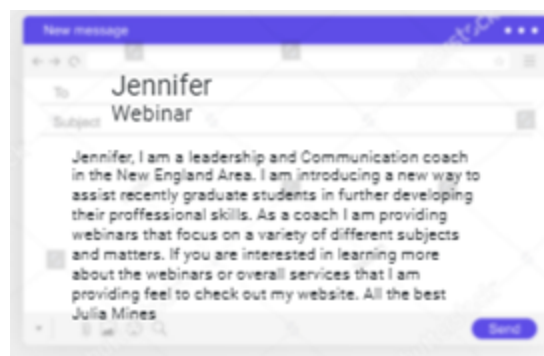
YouTube is another platform that can be used to share content, as a team we think Julia can utilize YouTube to share content whether it be quick tips that can benefit others or a way to advertise what she offers. We think in terms of the push and pull, one video idea concept we were thinking would be to create a 1–2-minute professional video that can be linked on the homepage of the website. In this segment, Julia would be talking with previous clients about their experiences and having that interaction with them, would be appealing for those clients who would like a leadership coach. They get a glimpse at what Julia can offer, how she can help and the different resources that are available. Based on research, the Center of Executive Coaching says “ If all you offer is coaching, consider broadening your services. Have a book, a seminar, an information product like video or audio based.. so that as many people as possible will experience your content” (2016). That is one of the reasons why we think Julia should do this as this helps increase awareness of her services and it would be a reusable video that can be watched by clients over and over.

APPENDIX K2: Online Advertising

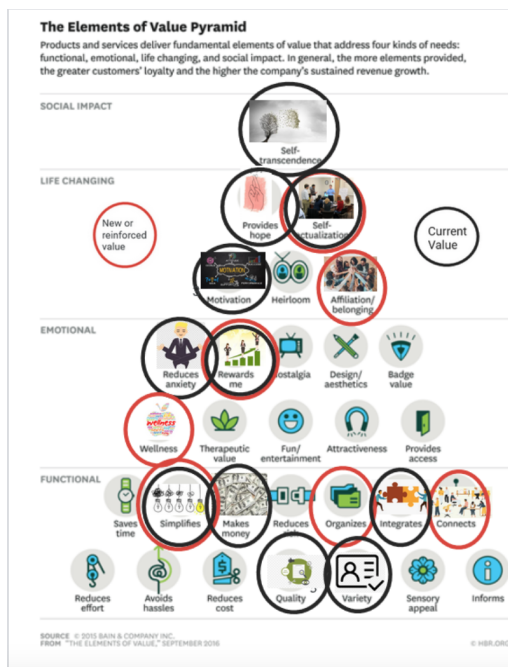
PPC Coach Marketing

**After-Sale Strategy**

For both our push and pull strategy the best way Julia can make sure clients are well after they have completed all sessions would be to possibly send out an email every once in a while. By doing so, clients will feel more willing to reference Julia if someone they know needs a leadership coach. This will also broaden the market for Julia as more clients decide to work with her. We thought that this strategy would work best because it's the most efficient, low cost and effective method that will keep clients connected with Julia. To get some insight, we looked at best practices for email marketing and HubSpot had mentioned "personalizing the email greeting grabs the attention of each reader right away" (Vaughan). HubSpot also mentions that if you have a large number of recipients that you want to send a personalized email to, there are email marketing tools that allow a person to configure the greeting of the email campaign so everyone gets a personal version of the same message. Another tip they suggest is sticking to a fewer than three typefaces, "the less clutter you have in your email, the more conversions you'll experience. Don't junk up an email with more than two, or a maximum of three, fonts, or typefaces" (Vaughan). A last tip would be Avoid using 'No-reply' in the sender's email address, the 'no-reply' in an email message prevents recipients from responding and even opting out of further messages. Below we created two kinds of emails that could be written for clients like Jessica/Michael/Matthew and Jennifer. This is a great way for Julia to connect with her clients and potential clients.



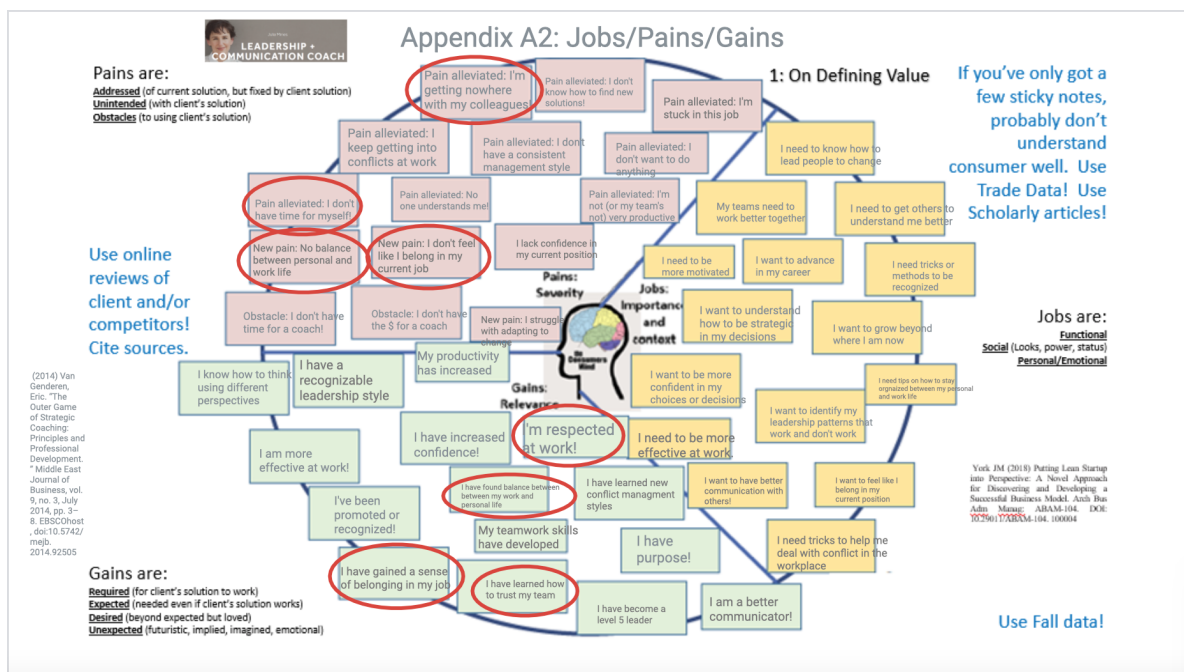
Work Cited/Appendix

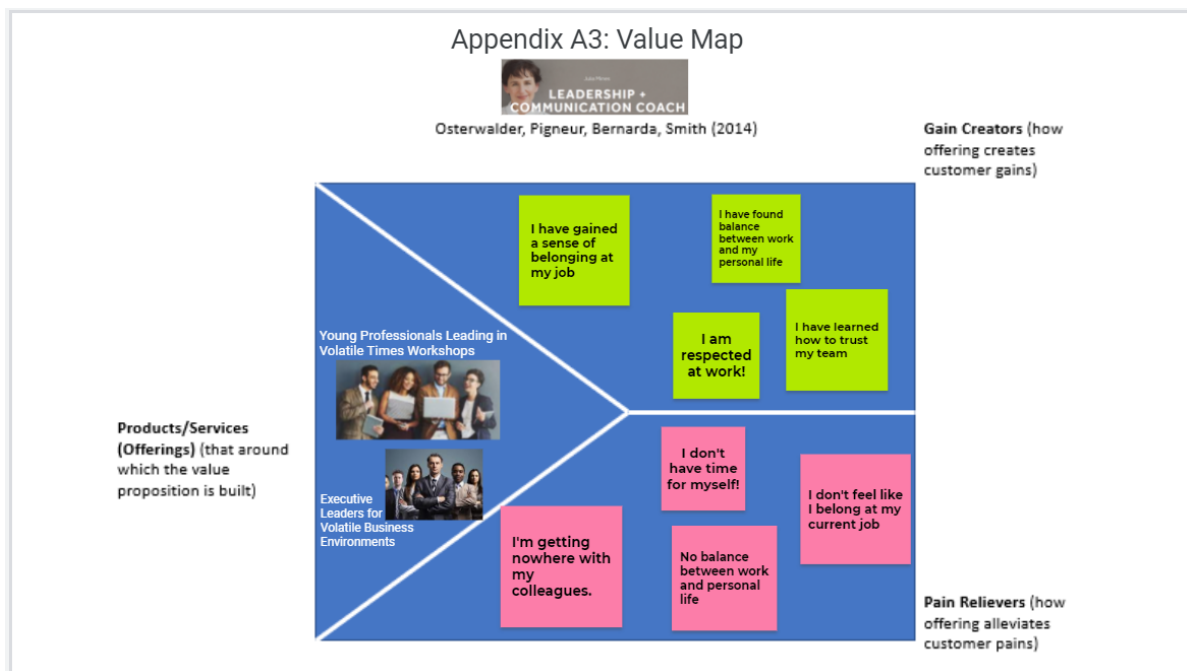


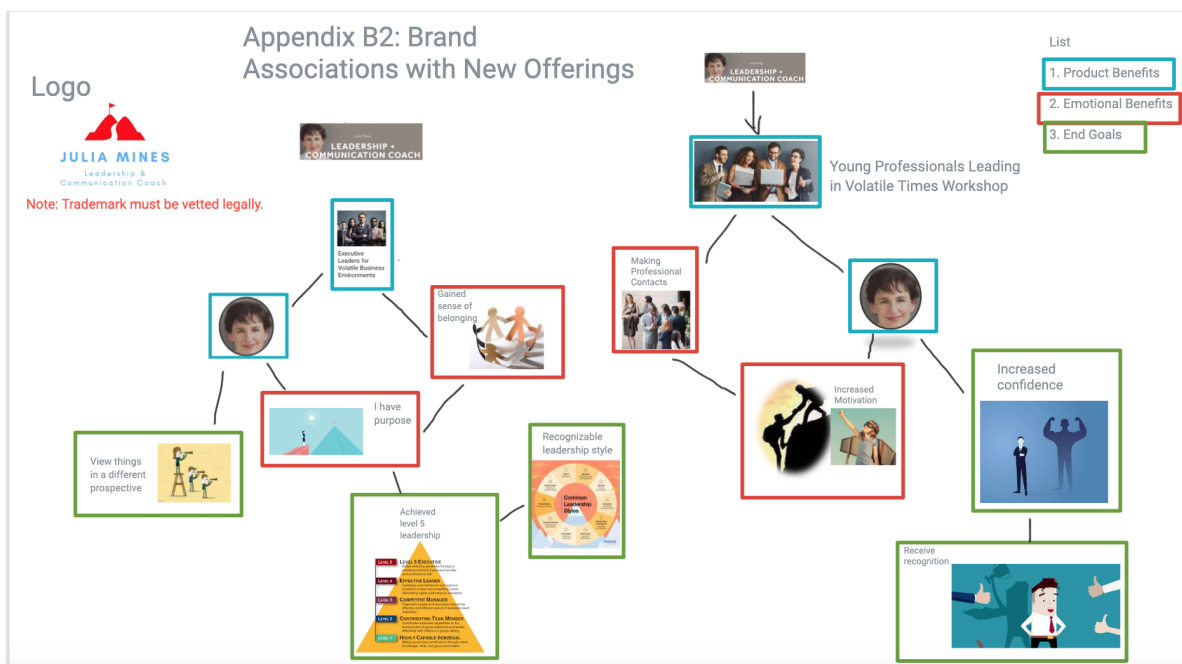
Appendix A1: Value Pyramid

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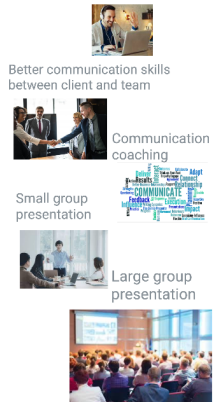


APPENDIX H2



Appendix B1: Value and Offering Mix

Speaker Coaching



Executive Coaching



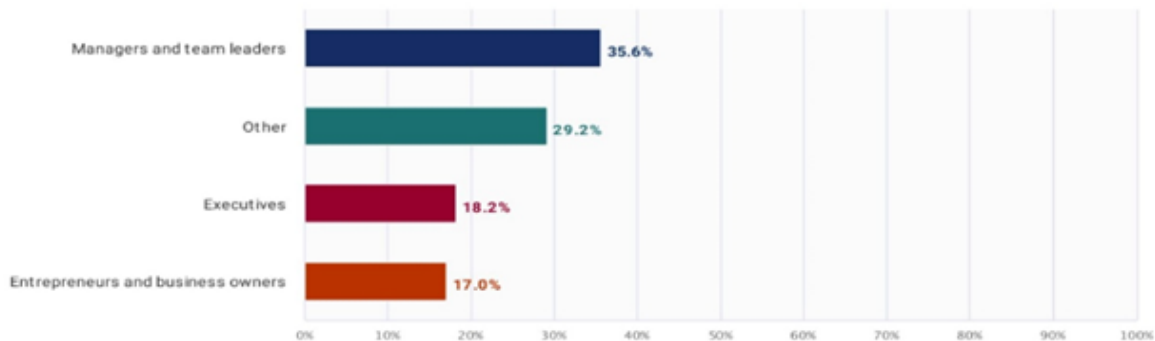
Workshops



Business Bootcamp



Major Market Segmentation



2020 INDUSTRY REVENUE

\$11.6bnBusiness Coaching
Source: IBISWorld

APPENDIX J1: Website and Mobile Marketing



APPENDIX J2: Email and Social Media Marketing

Based on the article from hootsuite, three suggestions include:

- 1) Include some of the criteria on about page Who are you?
Where are you based?
What do you offer?
What are your values?
What is your brand voice?
How can people contact you to learn more?
- 2) Update profile banner
- 3) Post or reshare article that can motivate/inspire those in leadership positions

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Demographic Profile



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