



# Professional HOME BASED BUSINESS

# MARKETING PLAN 2025

Presented By  
Professional  
Homebased Business



## Executive Summary

This marketing plan focuses on establishing a data brokerage business serving financial institutions, healthcare insurers, and small businesses. The primary objective is to achieve annual revenue of \$250,000 by building a client base for data products and services, Artificial Intelligence systems, leveraging industry-specific insights, and providing tailored solutions for business growth.

### 1. Target Audiences

Our target audiences consist of:

1. **Financial Institutions** – Both public and privately owned entities requiring funding applications, leasing and loan packages.
2. **Healthcare Insurance Companies** – Insurers offering Affordable Care Act compliant medical coverage, as well as Self-Insured Medical Expense Reimbursement Plans.
3. **Lead and Traffic Providers** - Both public and privately owned entities that supply targeted, real-time audiences of various types and categories, to businesses, marketers and entrepreneurs..
4. **Business Profile One** – Business Owners, Marketers and Entrepreneurs needing AI staffing support to optimize operations and customer service, inbound and outbound calls.
5. **Business Profile Two** - Business Owners and Decision Makers interested in Employee Healthcare Benefits offered through a SIMERP - Self-Insured Medical Reimbursement Plan..
6. **Business Profile Three** - Business Owners, Decision Makers, Marketers and Entrepreneurs needing or seeking real-time traffic and lead generation systems and services.
7. **Business Profile Four** - Business Owners, Decision Makers, Marketers and Entrepreneurs needing or seeking commercial financing, leasing or consumer installment financing that is not available through conventional means.

## 2. Revenue Streams

- **Data Packages for Financial Services:** Custom loan and lease applications packages, that pay from 1% to 18% of the funding or leasing dollar amount.
- **Healthcare Solutions:** Businesses with 20 employees and above who enroll in a Self-Insured Medical Expense Reimbursement Plan (SIMERP), paying from \$7.00 to \$18.00 per W-2 employee, per month.
- **AI Marketing and Staffing Solutions:** Custom AI-based inbound and outbound marketing, support and staffing systems, payable through a subscription based model of \$50.00 to \$500.00 per month.
- **Lead and Traffic Generation:** Custom Real-Time Audience Delivery services and marketing campaigns, payable through a cost plus 20%(+) per campaign model.

## 3. Value Proposition

Position the company as a trusted provider of customized financial packages, Artificial Intelligence systems, SIMERP services, and high-quality, actionable, and compliance-driven data products and services that maximize profitability.

## 4. Marketing Objectives

- **Revenue Goal:** \$250,000 annually.
- **Customer Acquisition:** Acquire 10-15 finance and leasing packages, 8-10 healthcare SIMERP clients, 20-25 AI Services clients, and 25-30 Lead and Traffic Generation clients..
- **Retention Rate:** 80% client retention for recurring product and service needs.

## 5. Marketing Strategies

- **Email/SMS/Voice Outreach:** Starting with the basics and least costly, implement Email, SMS and AI Voice marketing campaigns. By using free to low-cost business databases and a trained human Virtual Assistant, create personalized Email, SMS and Voice campaigns for business owners, decision makers, marketers and entrepreneurs in target industries.

- **Direct Sales and Networking:** Utilize a consultative sales approach to build relationships with decision-makers in Business, Financial and Healthcare sectors. Offer initial data assessments or free but limited services to establish credibility and trust.
- **Content Marketing:** Develop thought leadership articles, white-papers, and case studies showing data's impact.
- **Website and SEO:** Optimize websites for appropriate financial, lead generation, SIMERP and AI related keywords and phrases. Include clear calls-to-action (CTAs).
- **Paid Advertising:** Use LinkedIn and Google Ads to reach B2B clients actively searching for solutions in finance, healthcare, business, and eCommerce.

## 6. Sales Funnel

- **Awareness Stage:** Reach potential clients through Email, SMS, Ringless Voicemail, Content Marketing and Paid Advertising.
- **Interest Stage:** Engage leads with personalized outreach, focusing on their specific needs and offering a free initial consultation.
- **Decision Stage:** Provide tailored proposals that outline how your services directly benefit their objectives.
- **Retention:** Offer ongoing support, regular updates, and a feedback loop for continuous improvement.

## 7. Pricing Strategy

- **Financial Data Packages:** \$10,000 per package, with a goal of selling to up to 10 institutions (\$100,000 annual revenue).
- **Healthcare Data Services:** Subscription model at \$12,500 per client annually, with a goal of 8 clients (\$100,000 annual revenue).
- **eCommerce AI Solutions:** Smaller custom data and AI packages at \$2,500 per package, aiming for 20 clients (\$50,000 annual revenue).

- **Traffic - Lead Generation:** Subscription model at \$10,000 per client annually, with a goal of 25 clients (\$250,000 annual revenue).

## 8. Budget Allocation

The following Allocations are projected to be offset by sales. Some services may be excluded as necessary. In addition, any projected prices may be lower or higher, based on your goals and preferences (see **Pricing Strategy**):

- **Paid Advertising:** Cost Plus 10%
- **Email Marketing** Cost Plus 10%
- **Ringless Voicemail** Cost Plus 10%
- **SMS Marketing** Cost Plus 10%
- **Trained Virtual Assistant** \$5,000/year
- **In-House Business Data Records** FREE

At the bare minimum, a **Trained Virtual Assistant** processing **free In-House Business Data Records**, should be initially implemented.

## 9. Key Performance Indicators (KPIs)

- **Customer Acquisition Cost (CAC):** Track cost per acquisition to ensure marketing efficiency.
- **Lead Conversion Rate:** Aim for a 15-20% conversion rate from leads to customers.
- **Customer Lifetime Value (CLV):** Calculate based on repeat purchases and subscriptions.
- **Client Satisfaction:** Conduct quarterly surveys to measure satisfaction and identify areas for improvement.

## 10. Milestones

- **First Quarter:** Secure initial contracts with two financial institutions and two healthcare insurers.

- **Mid-Year:** Achieve \$125,000 in revenue through steady sales and client acquisition.
- **End of Year:** Attain \$250,000 in revenue, reaching full capacity with retention of key clients.

## 11. Monitoring and Evaluation

Regularly track KPIs through marketing analytics tools. Adjust marketing campaigns based on conversion rates, feedback, and evolving industry needs. Hold quarterly reviews to assess and optimize the marketing plan.

This plan is designed to achieve a sustainable revenue stream and establish a strong reputation as a data broker in high-value industries. The focus is on building trust, showcasing expertise, and delivering measurable results for clients in finance, healthcare, and eCommerce.