

FIFO BRAND STRATEGY

OVERVIEW

Your **Brand Strategy** dictates your customer’s experience from start to finish and how things are going to work for your brand along the way. It takes care of the business strategy and high-level thinking through a long-term plan developed to help your company achieve specific goals.

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WHO?

This is where it all starts. Ask yourself who you are trying to engage with your branding.

In marketing, we “divide” the marketplace into segments, essentially creating groups of customers based on observable attributes/characteristics related to a business. For example, if you owned a plant nursery, you might serve homeowners and small landscaping businesses. The homeowner, compared to the landscaper, buys a small volume and less frequently, whereas the landscaper makes bulk purchases more frequently. While you sell many of the same products and services, these two segments need to be handled differently from a marketing standpoint.

Your **Buyer Persona** should represent your customer base. These fictional profiles will help to ensure your brand and marketing efforts appeal to your audience.

Any change to your branding can bring on confusion. So, remember that by creating an ideal **Buyer Persona** you are uncovering vital information that will make your brand more appealing to new and existing customers. Worry less about alienating your current customers with new branding - they're already bought in.

Focus on where you're going, not where you've been.

EXISTING CUSTOMERS

Who are your customers and what can they teach you about your brand?

- The Solopreneur Starter (independent contractors, self-employed business owners, gig workers, and freelancers)
- The Established Entrepreneur
- The Veteran Business Owner

This exercise will help develop your **Buyer Persona** by asking you to assess your existing customers as well as think about new customers you want to capture.

THE SOLOPRENEUR STARTER

Questions	What to think about...	Current Primary Customer
1. Describe the type of customer you are thinking of?	<ul style="list-style-type: none"> • Are they a certain gender, age, income, educational background, location, etc.? • Are they consumers or other businesses? • If a business, is it a specific business industry or area? (e.g., healthcare, consulting, trades, etc.) • Are they in a unique life stage? (e.g., first-time home buyer, new parent) or business stage (e.g., start-up, small, etc.) 	The Solopreneur Starter is a 25-34-year-old creative freelancer or early-stage entrepreneur with some college education, earning \$30,000-\$50,000 annually, focused on growing their solo business in the arts, entertainment, or consulting industries.
2. What does this group care about relative to your product/service solution?	<ul style="list-style-type: none"> • What matters most to them? Price, quality, service, delivery/logistics, etc. • Include the wants, hopes, dreams, and fears that compel your customer to act. • Do they use your product for a specific purpose or have special usage needs? 	The Solopreneur Starter cares most about affordability and ease of use when it comes to accessing government credits and incentives. They want a solution that simplifies complex tax processes without requiring upfront costs, helping them maximize their savings as they grow their business. They dream of financial stability and scaling their business but fear missing out on opportunities due to their limited experience with tax credits. They seek a trustworthy service that can guide them through the process, ensuring they don't leave money on the table while focusing on their passion-driven work.
3. What is the biggest pain point for this customer?	<ul style="list-style-type: none"> • The "pain points" (or greatest challenges) that your customer faces that need your solution 	The biggest pain point for The Solopreneur Starter is navigating the complex and often confusing process of claiming government credits and incentives, especially with their limited experience and knowledge in financial management, which can lead to missed opportunities and financial strain.
4. Why does this customer need your product or service?	<ul style="list-style-type: none"> • Do they use it to create something else? • Are you solving a specific problem for them? 	The Solopreneur Starter needs FIFO's services to simplify the process of identifying and

	<ul style="list-style-type: none"> • Impulse purchase? 	<p>claiming government credits and incentives, helping them maximize their savings and financial benefits without the stress of navigating complex tax laws on their own. This support is crucial for them to grow their business, maintain financial stability, and avoid missing out on valuable opportunities that could boost their income.</p>
5. Where does this customer get information, help, or answers?	<ul style="list-style-type: none"> • Do they come to your website or store? • Search the internet, use social media? • Subscribe to magazines/newspapers or listen to the radio? 	<p>The Solopreneur Starter typically gets information from online forums, social media groups, and communities focused on freelancing and entrepreneurship. They also rely on blogs, YouTube channels, and podcasts that offer advice on running a solo business. For more specific financial or tax-related questions, they may consult with online tax resources, use accounting software with integrated support features, or seek advice from peers or mentors within their industry</p>
6. How do you want customers to feel after using your product/service?	<ul style="list-style-type: none"> • What is the biggest takeaway they should have after using your product/service? 	<p>After using FIFO's services, The Solopreneur Starter should feel empowered, confident, and relieved. They should walk away with the reassurance that they've maximized their financial opportunities, avoided costly mistakes, and taken a significant step toward growing their business.</p>
7. What proportion of your business is made up of this customer type?	<ul style="list-style-type: none"> • Is this the only customer you serve? • If you serve other types, what proportion does this customer represent? 	<p>The Solopreneur Starter likely makes up a significant portion of FIFO's business, accounting for approximately 40-50% of the client base. This group is a key target for FIFO due to their high need for assistance in navigating tax credits and incentives as they establish and grow their solo ventures.</p>

THE ESTABLISHED ENTREPRENEUR

Questions	What to think about...	Current Primary Customer
1. Describe the type of customer you are thinking of?	<ul style="list-style-type: none"> • Are they a certain gender, age, income, educational background, location, etc.? • Are they consumers or other businesses? • If a business, is it a specific business industry or area? (e.g., healthcare, consulting, trades, etc.) • Are they in a unique life stage? (e.g., first-time home buyer, new parent) or business stage (e.g., start-up, small, etc.) 	The Established Entrepreneur is a 35-44-year-old small business owner with a bachelor's degree or higher, earning \$50,000-\$100,000+ annually, running a professional service or real estate business with 6-10 years of experience and possibly a small team.
2. What does this group care about relative to your product/service solution?	<ul style="list-style-type: none"> • What matters most to them? Price, quality, service, delivery/logistics, etc. • Include the wants, hopes, dreams, and fears that compel your customer to act. • Do they use your product for a specific purpose or have special usage needs? 	The Established Entrepreneur values expertise and efficiency in optimizing their taxes and managing financials as their business scales. They seek a reliable service that helps them maximize profitability, avoid missed tax credits, and ensures compliance with ever-changing tax laws. Their main concerns include reducing their tax burden, long-term financial planning, and managing the complexities of a growing business.
3. What is the biggest pain point for this customer?	<ul style="list-style-type: none"> • The "pain points" (or greatest challenges) that your customer faces that need your solution 	The biggest pain point for The Established Entrepreneur is the challenge of staying informed about and effectively utilizing tax credits and incentives while managing the demands of a growing business, which can lead to missed opportunities and increased tax liabilities.
4. Why does this customer need your product or service?	<ul style="list-style-type: none"> • Do they use it to create something else? • Are you solving a specific problem for them? • Impulse purchase? 	The Established Entrepreneur needs FIFO's services to expertly navigate the intricacies of tax credits and incentives, ensuring they maximize savings, maintain compliance, and efficiently manage their financial responsibilities as their business scales.
5. Where does this customer get information, help, or answers?	<ul style="list-style-type: none"> • Do they come to your website or store? • Search the internet, use social media? • Subscribe to magazines/newspapers or listen to the radio? 	The Established Entrepreneur typically turns to professional networks, industry-specific forums, and trusted advisors like accountants, tax professionals, and business consultants. They also rely on reputable online resources, webinars, and industry publications to stay informed about financial management and tax-related issues.
6. How do you want customers to feel after using your product/service?	<ul style="list-style-type: none"> • What is the biggest takeaway they should have after using your product/service? 	After using FIFO's services, The Established Entrepreneur should feel confident, secure, and well-supported. They should have the satisfaction of knowing their tax situation is optimized, their business is financially efficient, and they are well-prepared for future growth.

<p>7. What proportion of your business is made up of this customer type?</p>	<ul style="list-style-type: none"> • Is this the only customer you serve? • If you serve other types, what proportion does this customer represent? 	<p>The Established Entrepreneur likely represents around 30-40% of FIFO's business, being a critical segment that seeks specialized expertise to manage the complexities of their more established and growing businesses. Their ongoing need for professional tax optimization and financial management services makes them a substantial and reliable customer base.</p>
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THE VETERAN BUSINESS OWNER

Questions	What to think about...	Current Primary Customer
<p>1. Describe the type of customer you are thinking of?</p>	<ul style="list-style-type: none"> • Are they a certain gender, age, income, educational background, location, etc.? • Are they consumers or other businesses? • If a business, is it a specific business industry or area? (e.g., healthcare, consulting, trades, etc.) • Are they in a unique life stage? (e.g., first-time home buyer, new parent) or business stage (e.g., start-up, small, etc.) 	<p>The Veteran Business Owner is a 45-54-year-old seasoned entrepreneur with a high school diploma or some college education, earning \$70,000-\$100,000+ annually, running a traditional service-based business like construction or real estate with 10+ years of experience, often as a sole proprietor or within a small LLC.</p>
<p>2. What does this group care about relative to your product/service solution?</p>	<ul style="list-style-type: none"> • What matters most to them? Price, quality, service, delivery/logistics, etc. • Include the wants, hopes, dreams, and fears that compel your customer to act. • Do they use your product for a specific purpose or have special usage needs? 	<p>The Veteran Business Owner values comprehensive financial services that simplify tax management and optimize credits and incentives. They care about efficiency, reliability, and long-term financial stability. Their primary focus is on securing their financial legacy, minimizing tax liabilities, and reducing the complexity of financial management as they approach retirement.</p>
<p>3. What is the biggest pain point for this customer?</p>	<ul style="list-style-type: none"> • The "pain points" (or greatest challenges) that your customer faces that need your solution 	<p>The biggest pain point for The Veteran Business Owner is balancing the time-consuming demands of running a well-established business while managing their finances efficiently, especially with the challenge of staying updated on new tax incentives and planning for retirement.</p>
<p>4. Why does this customer need your product or service?</p>	<ul style="list-style-type: none"> • Do they use it to create something else? • Are you solving a specific problem for them? • Impulse purchase? 	<p>The Veteran Business Owner needs FIFO's services to streamline the process of claiming tax credits and incentives, saving them time and reducing their financial management burden. This allows them to focus on their business operations while ensuring they are not leaving any money on the table and are prepared for long-term financial success.</p>

<p>5. Where does this customer get information, help, or answers?</p>	<ul style="list-style-type: none"> • Do they come to your website or store? • Search the internet, use social media? • Subscribe to magazines/newspapers or listen to the radio? 	<p>The Veteran Business Owner typically relies on long-established relationships with trusted financial advisors, accountants, and tax professionals. They may also turn to industry-specific associations, local business networks, and practical, experience-based knowledge shared within their industry.</p>
<p>6. How do you want customers to feel after using your product/service?</p>	<ul style="list-style-type: none"> • What is the biggest takeaway they should have after using your product/service? 	<p>After using FIFO's services, The Veteran Business Owner should feel relieved, secure, and confident in their financial future. They should have a strong sense of trust in the service, knowing that their tax liabilities are minimized, their business finances are well-managed, and they are on track to preserve their wealth for the long term.</p>
<p>7. What proportion of your business is made up of this customer type?</p>	<ul style="list-style-type: none"> • Is this the only customer you serve? • If you serve other types, what proportion does this customer represent? 	<p>The Veteran Business Owner likely makes up around 20-30% of FIFO's business. While they represent a smaller segment compared to the other personas, their need for comprehensive and ongoing financial services makes them a valuable and consistent customer base, especially as they prepare for retirement and focus on long-term financial security.</p>

COMPETITIVE ADVANTAGES

What differentiates you from other competitors?

THE SOLOPRENEUR STARTER

Key Competitive Variables	Your Capabilities
Automated Credit Identification and Review	Using tech integrations from our partners Taxstatus & Chart, FIFO automates the identification and sharing of tax documentation for our review to ensure customers qualify for credits.
Secure Verification and Onboarding	FIFO uses ID.me for secure client verification during the onboarding process, ensuring that all users are verified to the highest standard.
Flexible Payment Options	FIFO offers multiple payment options, including Pay Up Front, Pay On Receipt, and Cash Advance (where applicable), allowing solopreneurs to choose a payment method that best suits their financial situation.

What other competitive advantages and/or benefits can you add?

Scalable Financial Management Tools:

- Suggest offering tools that grow with the user's business needs, providing more advanced features as their business expands.

Educational Resources on Financial Literacy:

- Consider adding educational resources or webinars to help solopreneurs improve their financial literacy, empowering them to make informed decisions.

THE ESTABLISHED ENTREPRENEUR

Key Competitive Variables	Your Capabilities
Efficient and Automated Processes	FIFO's platform automates key steps in the Sick and Family Leave Credit application process, ensuring accuracy and efficiency for established entrepreneurs.
Trusted Verification and Secure Data Handling	Through ID.me integration, FIFO ensures that all users are verified to the highest security standards, with secure data handling throughout the process.
Flexible Payment Options	FIFO offers multiple payment options, including Pay Up Front, Pay On Receipt, and Cash Advance (where applicable), allowing entrepreneurs to choose a plan that aligns with their business cash flow needs.

What other competitive advantages and/or benefits can you add?

Comprehensive Financial Reporting:

- Consider offering detailed financial reporting tools that help business owners make informed decisions about their finances and business growth.

Seamless Integration with Existing Tools:

- Explore the possibility of integrating FIFO's services with popular accounting software and business tools to streamline operations for entrepreneurs.

THE VETERAN BUSINESS OWNER

Key Competitive Variables	Your Capabilities
Automated Tax Credit Identification and Application	FIFO's platform is specifically designed to help veteran business owners efficiently apply for the Sick and Family Leave Credit, with automated processes that handle the complexities of the application.
Secure Verification and Onboarding	FIFO utilizes ID.me for secure client verification, ensuring that veteran business owners' personal and financial information is protected to the highest standards.
Flexible Payment Options	FIFO offers multiple payment methods, including Pay Up Front, Pay On Receipt, and Cash Advance, providing flexibility based on the veteran business owner's financial preferences.

What other competitive advantages and/or benefits can you add?

Personalized Advisory Services:

- Consider offering personalized support with dedicated advisors to cater to the unique needs of veteran business owners who seek more tailored financial management.

Long-Term Wealth Preservation Strategies:

- Explore the potential of offering services that focus on long-term wealth preservation, helping veteran business owners plan for retirement and legacy management.

BUYER PERSONA PROFILES

A **Buyer Persona** is a fictional representation of your ideal customer.

In this section, we will describe the customer segments you serve and/or want to serve. Think of the characteristics that make this customer segment unique. What are some things you know about their purchase behaviors or needs?

It may be helpful to review your current customer database, poll your sales team or simply think about who you currently serve and sell to that you believe represents your ideal customer.

- **Identity:** The “who” of your customer goes here. B2C: Think about gender, marital status, level of education, background, and location. B2B/B2G: Think about revenues, location, industry, phase of business, channel, etc.
- **Biggest Pain(s):** The pain points or greatest challenges that your customer faces that need your solution.
- **Motivations:** The “why” of your customer goes here. Include the wants, hopes, dreams, and fears that compel your customer to act on your solution.
- **A Day in the Life:** The “what” of your customer goes here. Go through their daily routines and work processes such as where they get information, where they hang out, and what they do.

This will become your reference sheet for salespeople, the marketing team, customer service staff, and other team members as you discuss and make plans around customers.

THE SOLOPRENEUR STARTER

Identity (Demographic) <ul style="list-style-type: none">• Age: 25-34 years old.• Gender: 55% male 45% female.• Language: English (primary), with potential for bilingual abilities depending on specific background.• Education: Some college or associate degree.• Race: Diverse; likely reflects a mix of racial backgrounds common among freelancers and creative professionals.• Location: Urban areas, potentially in major cities or tech hubs.• Budget: Limited; cost-conscious and looking for affordable services.• Industry: Creative or freelance industries such as arts, entertainment, and recreation.• Job Title: Freelancer, Creative Entrepreneur, Consultant.• Profession: Self-employed in creative fields (e.g., graphic designer, writer, photographer, consultant).• Marital Status: Likely single or in a relationship, not necessarily married.• Income Range: \$30,000 - \$50,000 annually.	Motivations (Psychological) <ul style="list-style-type: none">• Desire for Financial Independence• Passion for Creative Freedom• Fear of Missing Opportunities• Growth and Success
Biggest Pain(s) <ul style="list-style-type: none">• Navigating Complex Tax Processes• Limited Financial Knowledge• Fear of Missing Out on Tax Credits• Managing Cash Flow on a Tight Budget• Uncertainty About Compliance and Eligibility• Lack of Time to Explore Tax Credits	Day in the Life <ul style="list-style-type: none">• Responds to client emails and messages.• Works on creative projects (design, writing, consulting).• Updates social media and portfolio.• Researches industry trends and new tools.• Manages invoices and tracks payments.• Juggles multiple client deadlines.• Searches for new clients or gigs.• Attends virtual networking events or webinars.• Balances personal life with business tasks.• Reviews and files expenses.• Engages with favorite creative influencers on Instagram or YouTube.• Hobbies and interests: Art, music, photography, travel, fitness.

THE ESTABLISHED ENTREPRENEUR

Identity (Demographic) <ul style="list-style-type: none">• Age: 35-44 years old.• Gender: 55% male, 45% female.• Language: English (primary), with potential for bilingual abilities depending on specific background.• Education: Bachelor's degree or higher.• Race: Diverse, with a higher likelihood of representation from ethnic groups in professional services.• Location: Urban or suburban areas, likely near business centers or tech hubs.• Budget: Moderate; willing to invest in services that offer clear ROI and efficiency.• Industry: Professional and business services, real estate, or healthcare.• Job Title: Small Business Owner, CEO, Founder.• Profession: Self-employed in professional services (e.g., consultant, real estate agent, healthcare provider).• Marital Status: Likely married or in a long-term relationship.• Income Range: \$50,000 - \$100,000+ annually.	Motivations (Psychological) <ul style="list-style-type: none">• Maximizing Profitability• Ensuring Compliance• Long-Term Financial Security• Recognition and Reputation
Biggest Pain(s) <ul style="list-style-type: none">• Staying Informed About Changing Tax Laws• Balancing Business Growth with Financial Management• Avoiding Missed Tax Opportunities• Ensuring Accurate and Timely Filing• Managing Increasing Complexity as the Business Scales• Limited Time to Dedicate to Tax and Financial Planning	Day in the Life <ul style="list-style-type: none">• Checks in with team members and delegates tasks.• Meets with clients or potential clients.• Reviews financial reports and business metrics.• Strategizes on business growth and development.• Attends industry-specific conferences or networking events.• Manages client relationships and communications.• Reviews contracts and business agreements.• Engages in marketing efforts (social media, email campaigns).• Stays informed on industry trends and regulatory changes.• Hobbies and interests: family activities, travel, reading business books.

THE VETERAN BUSINESS OWNER

<p>Identity (Demographic)</p> <ul style="list-style-type: none">• Age: 45-54 years old.• Gender: 55% male, 45% female.• Language: English (primary), with potential for regional dialects or bilingual abilities.• Education: High school graduate or some college, with significant practical experience.• Race: Diverse, with representation from various ethnic groups, often reflective of traditional service industries.• Location: Suburban or rural areas, possibly near industrial or service-oriented regions.• Budget: Moderate to high; focused on value, long-term investment, and wealth preservation.• Industry: Construction, real estate, or other traditional service-based industries.• Job Title: Business Owner, Sole Proprietor, CEO.• Profession: Self-employed in traditional service industries (e.g., contractor, real estate developer, service provider).• Marital Status: Likely married, possibly with children.• Income Range: \$70,000 - \$100,000+ annually.	<p>Motivations (Psychological)</p> <ul style="list-style-type: none">• Wealth Preservation• Simplifying Financial Management• Legacy Building• Minimizing Tax Liabilities
<p>Biggest Pain(s)</p> <ul style="list-style-type: none">• Balancing Time Between Business Operations and Financial Management• Navigating Complex Financial Decisions for Long-Term Stability• Ensuring They Aren't Overpaying in Taxes• Planning for Retirement and Legacy• Time Constraints Preventing Focus on Optimizing Tax Savings	<p>Day in the Life</p> <ul style="list-style-type: none">• Oversees daily business operations and staff.• Manages client accounts and customer service issues.• Reviews and approves financial documents and contracts.• Communicates with key business partners and vendors.• Reviews retirement and succession planning strategies.• Deals with regulatory compliance and legal issues.• Attends community or industry events for networking.• Plans for future business expansion or transition.• Engages with local business networks or associations.• Follows financial and industry-specific influencers on LinkedIn or in trade publications.• Hobbies and interests: Community involvement, family activities, real estate investments, travel.

Customer Feedback	
1. Is this profile complete? Is there anything you want to add?	Yes.
2. Are these the customers you want to focus on? If not, create another profile for the customer you wish to serve.	Yes these are the customers we'd like to focus on.
3. Do the buyer personas have a clear and actionable identity?	Yes.
4. Are the profiles realistic?	Yes they were very detailed and had a lot of thought put into them, great work!
5. Are there gaps or additional information needed to understand why each profile would make a purchase decision?	I believe you covered everything but I will let you know if I think of anything else.

BUYER JOURNEY

We will now map out the steps each **Buyer Persona Profile** goes through during the **Buyer Journey**.

- **Need Recognition/Trigger:** This is the character's external problems, what is affecting them, and how this is impeding them from growing and evolving. This explains what the customer needs, so you know how to help them achieve a solution.
- **Info Search:** This is where the customer has been looking for help to solve their external problems.
- **Evaluation:** This is what the customer will be considering when comparing options and deciding. It is critical to offer the customer a specific solution to work out their problem, so they opt to choose your services.
- **Purchase:** This is what made the customer specifically decide on your services, it means what you offered solved their problem and helped them achieve their goals.
- **Post-Purchase:** Once your services have helped answer the customer's problem and reach their objectives, this is what they acquire and how they will use your services to face new challenges in the future.

THE SOLOPRENEUR STARTER

Need Recognition/Trigger (Awareness)	Info Search (Interest)	Evaluation (Consideration)	Purchase (Decision)	Post-Purchase (Advocacy)
<p>Realizes they are missing out on tax credits or financial opportunities that could help their business grow.</p> <p>Feels overwhelmed by the complexity of tax processes and the fear of leaving money on the table.</p> <p>Needs to maximize savings and improve cash flow to reinvest in their business.</p>	<p>Browses online forums, social media groups, and freelancing communities for advice on tax credits.</p> <p>Searches for articles, blogs, and YouTube videos about tax savings for self-employed individuals.</p> <p>Consults with peers or mentors who have experience with tax credits.</p>	<p>Considers the ease of use and affordability of different tax service providers.</p> <p>Looks at customer reviews and testimonials to gauge the effectiveness of the service.</p> <p>Compares features like automation, user support, and security.</p> <p>Weighs the potential financial benefit against the cost and effort required.</p>	<p>Decides to use FIFO because it offers an automated, easy-to-use platform specifically designed for solopreneurs.</p> <p>The flexible payment options and secure verification process through ID.me give them confidence in the service.</p> <p>The platform's ability to identify and apply for tax credits without extensive financial knowledge is appealing.</p>	<p>Uses FIFO's platform to successfully claim tax credits, improving their cash flow.</p> <p>Gains confidence in managing their finances and tax obligations.</p> <p>Continues using FIFO to stay updated on future tax credits and incentives as their business grows.</p> <p>Recommends FIFO to other freelancers and solopreneurs in their network.</p>

THE ESTABLISHED ENTREPRENEUR

Need Recognition/Trigger (Awareness)	Info Search (Interest)	Evaluation (Consideration)	Purchase (Decision)	Post-Purchase (Advocacy)
<p>Recognizes the need to optimize tax savings as the business grows and becomes more complex.</p> <p>Faces challenges staying compliant with changing tax laws and ensuring they are not missing out on opportunities.</p> <p>Needs a reliable solution to manage increasing financial responsibilities and maximize profitability.</p>	<p>Consults with their accountant or financial advisor for advice on tax credits and incentives.</p> <p>Researches online for trusted tax service providers that cater to small and growing businesses.</p> <p>Attends industry-specific conferences or webinars to learn about tax optimization strategies.</p>	<p>Evaluates the reputation, security, and track record of different tax service providers.</p> <p>Considers the level of expertise and support offered.</p> <p>Reviews case studies, testimonials, and any available demos or consultations.</p> <p>Compares the cost of the service against the expected financial benefit and the convenience it offers.</p>	<p>Chooses FIFO because of its proven expertise in helping established entrepreneurs maximize tax savings.</p> <p>The platform’s integration with secure verification through ID.me and its tailored approach to business needs provide confidence.</p> <p>The flexible payment structures and comprehensive support make FIFO a reliable partner for managing tax obligations.</p>	<p>Successfully optimizes tax savings and ensures compliance with FIFO’s ongoing support.</p> <p>Continues using FIFO to stay informed about new tax credits and incentives as the business scales.</p> <p>Recommends FIFO to other business owners in their network as a trusted financial partner.</p>

THE VETERAN BUSINESS OWNER

Need Recognition/Trigger (Awareness)	Info Search (Interest)	Evaluation (Consideration)	Purchase (Decision)	Post-Purchase (Advocacy)
<p>Recognizes that they may be missing out on valuable tax credits and incentives that could help preserve and grow their wealth.</p> <p>Struggles to keep up with complex tax decisions and regulatory changes while managing daily operations.</p>	<p>Consults long-time financial advisors or accountants for recommendations on claiming tax credits and incentives.</p> <p>Searches for reputable tax service providers with expertise in helping business owners claim available credits.</p>	<p>Evaluates the credibility, security, and track record of different tax service providers in successfully claiming credits and incentives.</p> <p>Reviews feedback from other business owners and trusted sources.</p> <p>Compares the convenience and time-saving benefits of the service against the cost and expected outcomes.</p>	<p>Selects FIFO because of its proven ability to help business owners identify and claim significant tax credits and incentives.</p> <p>The flexible payment options and comprehensive, secure support align with their need for reliable and hassle-free financial management.</p>	<p>Successfully claims significant tax credits and incentives, resulting in substantial financial savings.</p> <p>Continues using FIFO to stay updated on and apply for new tax credits and incentives as they become available.</p> <p>Recommends FIFO to other veteran business owners as a trusted partner in maximizing tax savings and securing financial incentives.</p>

Buyer Journey Customer Feedback	
1. Have you considered all the possible triggers for a person to need your product or service?	Yes.
2. What are other places they might search for information? Be specific.	One of the ways we will be acquiring customers is by using our partnership with Green Dot, they have a network of EROs who will be referring their clients to us (and receiving a referral fee for it)
3. How else would you approach the evaluation of alternatives?	
4. What would be important in making the purchase?	We believe the trust aspect and simplicity of our process are the biggest two factors in the purchasing decision
5. What more could you do to increase the post-purchase experience?	CSAT, Aftercare

COMPETITIVE BENCHMARK

Profiling your competitors gives you a unique insight into your industry, what your customers want, and where the market is going. The purpose of analyzing competitors is to highlight the strengths and weaknesses in the market and gain insight into your competitor's **Brand Strategy**. From here, you can decide how you fit in, or more importantly, how you stand out.

GIG WORKER SOLUTIONS

Website Link	www.gigworkersolutions.com
Headlines/Slogan	One Membership. All of your self-employed needs. All in one place.
Primary Brand Colors	Blue and Green
Call to Actions	Get Started Unlock up to \$32,220 with the self-employed tax credit
About	Gig Worker Solutions is an all-in-one community for self-employed professionals, leveraging collective strength to access a comprehensive suite of services and tools, rivaling those of majoring corporations, all tailored specifically for the gig economy.
Advantages/Benefits	Large scope of services for self-employed professionals: CRM tools, business funding, lead generation software, marketing services, IT solutions, translation services, community, self-employed tax credit. Peace of Mind, Time Freedom, Expert Knowledge, Collective Financial Empowerment, Collaborative Growth No upfront fees for the self-employed tax credit Online forum and industry groups
Curriculum and Programs	Community: marketplace, weekly zooms, job postings, facebook group
How it Works (Plan, steps, etc.)	Join the community and unlock exclusive savings Solutions tailored for the gig economy A thriving community awaits your input Access valuable resources
Packages and Pricing	Not sure what the fees are.
Mission	Our mission is to elevate the journey of self-employed professionals, offering them comprehensive support and resources that fuel both their career growth and personal fulfillment. We stand committed to enriching the gig economy landscape, ensuring every member can

	chase their dreams with confidence and without compromise to their well-being.
Vision	None.
Video Links	YouTube
Social Media Links	Facebook LinkedIn Instagram TikTok

Website Link	www.irsplus.com
Headlines/Slogan	Incentives in Flux From Risks to Results
Call to Actions	Get Up to \$32,220 as a Tax-Free SETC Refund Check Claim Your Unseen Benefits
About	With years of experience in the tax and accounting industry, IRSplus Tax Firm has established a reputation for providing strategic tax planning and comprehensive financial solutions. We cover a diverse spectrum of credits, including ERC, SETC, R&D Tax credits, Energy Investment Tax Credits, WOTC Tax Credits, Cost Segregation, Section 179D Tax Deduction, Section 199A Deduction, Hiring Credits, and Incentives.
Advantages/Benefits	Top rated tax firm since 2017 Filed within 48 hours and receive your Refund Check within 8-12 weeks! Currently it's within 9 weeks! 7 years in business Pay after or pay upfront
Curriculum and Programs	Various tax and legal services for businesses
How it Works (Plan, steps, etc.)	Step 1: SETC Calculator Step 2: Qualifying Questionnaire Step 3: Upload Tax Returns & Picture ID Step 4: Sign Agreement
Packages and Pricing	25% if you pay after, 20% if you pay upfront

Mission	Our mission is to Help File Every Qualified Business & Individual in the United States to Receive their Tax Credit Refund Incentives.
Vision	None.
Video Links	None.
Social Media Links	None.

PINNACLE MINDS

Website Link	www.pinnaclemindsync.com
Headlines/Slogan	Making Complex Tax Benefits Accessible
Call to Actions	Partner With Pinnacle Minds
About	<p>(Formerly Smart ERC)</p> <p>With nearly two decades of experience, Pinnacle Minds is the premiere company for simplifying the complex process of applying for valuable tax incentives to help your business. We offer a variety of tax credits and financial solutions for small businesses and our knowledgeable team of former IRS Auditors are standing by to help you. Put our knowledge to work for you and let Pinnacle Minds do the heavy lifting so you can focus on your business.</p>
Advantages/Benefits	<p>With nearly two decades of dedicated service, our former IRS Auditors have cultivated a deep understanding of our clients' needs and challenges.</p> <p>Services:</p> <ul style="list-style-type: none">• Research & Development (R&D) Tax Credits• Self-Employment Tax Credits (SETC)• Employee Retention Credits (ERC)• Class-Action Settlement Claim Assistance• Merchant Services• Coming Soon: Government Loans & Grants
Curriculum and Programs	<p>The Self-Employment Tax Credits (SETC) are the Emergency Paid Sick Leave Act (EPSLA) and Expanded Family Medical Leave Act (Expanded FMLA) tax credits authorized under the American Rescue Plan (ARP). These self-employment tax credits (SETC) are designed to provide self-employed individuals with the relief they would have been entitled to, had they worked for a qualified W2 employer, for enduring disruptions in their work due to the pandemic. These credits can be highly beneficial for those who had to care for children or dependents, leading to lost work time and income.</p>
How it Works (Plan, steps, etc.)	Get Started > Intake questionnaire

Packages and Pricing	Does not specify
Mission	None.
Vision	None.
Video Links	YouTube (smart ERC)
Social Media Links	Facebook (smart ERC) LinkedIn (smart ERC)

Competitive Benchmark Key Takeaways	
Who are your biggest competitors?	Gig Worker Solutions, IRS Plus, Pinnacle Minds
What are your competitors offering?	Gig Workers Solutions offers a membership for various services and a community for self-employed professionals. IRS Plus and Pinnacle Minds both are backed by years of experience in the industry, offering a large variety of tax and legal services for businesses.
What are they doing on their website and social media?	Gig Workers has a professional website and social media accounts. They have nearly 7k followers on Instagram, where they post frequently. IRS Plus does not appear to be active on any social media channels, but they have a professional website with extensive information on multiple industries. Pinnacle Minds appears to be formerly the company Smart ERC. Their current website links to social media accounts under the name Smart ERC.
What does their customer service process look like?	Customers may reach out by submitting their information online.
What makes you different? What can you do to stand out? Is there a gap that they aren't filling that you could?	FIFO stands out from competitors like Gig Worker Solutions, IRS Plus, and Pinnacle Minds by offering a fully automated, secure, and user-friendly platform that simplifies the process of claiming tax credits and incentives. Unlike competitors who rely on cumbersome, manual process, FIFO provides a streamlined and transparent experience with flexible

payment options and trusted verification through ID.me. Additionally, FIFO can fill gaps left by competitors by focusing on comprehensive support, educational resources, and proactive monitoring of new tax opportunities, all while maintaining clear and trustworthy communication with clients.

FIFO can stand out by developing a strong branding and social media presence, positioning itself as the top resource for solopreneurs and business owners seeking to maximize tax credits and incentives. While Gig Worker Solutions has 7k Instagram followers, their low engagement presents an opportunity for FIFO to excel by creating highly engaging, educational content that resonates with its audience. By consistently posting value-driven content and actively engaging with followers, FIFO can build a loyal community, surpassing competitors who lack active social media accounts. This strategy will not only attract new clients but also establish FIFO as a trusted leader in the industry.

MARKET SIZE ESTIMATION

To understand the potential reach and impact of FIFO's services, we estimate the market size based on the number of self-employed individuals and small business owners in the United States who could benefit from tax credits and incentives.

TOTAL ADDRESSABLE MARKET (TAM)

Self-Employed Individuals: Approximately 44 million self-employed individuals and independent contractors in the U.S. could be potential clients for FIFO, as they are likely eligible for various tax credits and incentives.

Small Business Owners: With around 30.2 million small businesses in the U.S., many of which are likely underutilizing tax credits, this segment also represents a significant opportunity for FIFO's services.

SERVICEABLE AVAILABLE MARKET (SAM)

Self-Employed Individuals Who Filed a Net-Positive Income: Around 20 million self-employed individuals filed a net-positive income on their Schedule C in 2021, making them prime candidates for FIFO's services, especially for claiming the Sick and Family Leave Credit.

Businesses in Key Industries: Focusing on industries such as professional services, healthcare, real estate, and construction, which are more likely to engage in FIFO's offerings, the SAM could include a significant portion of small businesses across these sectors.

SERVICEABLE OBTAINABLE MARKET (SOM)

Targeted Clients for FIFO's Current Services: Estimating that FIFO could initially capture around 5-10% of the SAM within the first few years, this would represent approximately 1-2 million self-employed individuals and small business owners actively using FIFO's platform.

Projected Revenue Potential: Given the estimated average credit amount of \$4,800, the revenue potential from just 1 million clients could be substantial, further emphasizing the significant market opportunity for FIFO's services.

WHERE?

Brand Position is the process of influencing how you want customers to think of you. Done right, it's a strategy that sets your company apart from the rest.

Your **Brand Position** should answer the questions:

- What markets are you in?
- What proof do we have for the claims we make?
- What makes us different?

BRAND POSITION

Your **Brand Position Statement** positions you in the mind of your customers and in the market you're competing in. It tells customers where your brand sits in the market and where you hope to go.

You must acknowledge what's important to you and, as a result, you may have to make some sacrifices - but that doesn't have to be a bad thing. If you're more expensive than your competitors then you can offer a better level of service, or if you are a smaller team then you can be more agile and responsive. Take these statements as examples:

- "We're more expensive than our competitors, and don't want to compete on price, because we offer a much better service."
- "We're smaller and leaner than our competitors, which means we're much more agile and flexible and can deliver results quicker."
- "The competition is all in high-rises, wearing designer suits, but we're a smaller firm, who wear jeans and have a quirky office space."

The **Brand Position Statement** is similar to the **Value Proposition**, but it's not going to be as broad. You're still speaking to your **Buyer Persona**, but now you're paying *particular attention to your competition*.

The **Brand Position Statement** is less about mere messaging than differentiation. While your **Value Proposition** may speak to several benefits that your customers can expect, your **Brand Position Statement** should zero in on the precise ways those benefits separate your product from the rest of the market.

An easy way to give yourselves an idea of where to position yourself in your marketplace is to answer these questions:

- Who are our biggest competitors?
- What is our Unique Selling Proposition / how are you different?
- Who is our cheapest competitor, and who is our most expensive competitor?
- How do our target markets align?
- Where on the scale do we place ourselves among these competitors?

Competitor	Attribute	Opposite Attribute	Positive Spin on Opposite Attribute
Gig Worker Solutions	Big Community	Personalized	While Gig Worker Solutions have a huge community of clients, we offer a more personalized experience.
IRS Plus	Vast tax/legal services	Expertise in tax incentives	We may offer less services than other companies, but we are experts in our field.
Pinnacle Minds	20 years experience	Fresh approach	We have less experience, but our fresh approach allows us to provide a more efficient service.

#	Brand Position Statements (Drafts)	Proof Points
1	While competitors rely on outdated, cumbersome processes, we offer a streamlined, automated platform that makes claiming tax credits fast, secure, and hassle-free.	Automated identification and application of tax credits. ID.me partnership for top-tier security. Partnerships with ID.ME, TaxStatus, Green Dot, ChartAPI,
2	Unlike competitors who spread themselves thin across various services, we focus solely on tax credits, providing unmatched expertise and a simpler experience.	Specialized focus on tax credits and incentives.
3	While others use expensive affiliate marketing and flashy tactics, we invest in secure, efficient technology to deliver real value without the fluff.	Efficient, automated processes that reduce costs and increase value.

Your **Brand Position** should not change once it's in place. You don't want to risk being another "me too" business. You want to stake your claim, rather than try to position yourself in the same way as another company.

Answer the questions below based on the **Brand Position Statement** drafts above to settle on your position.

Customer Feedback	Brand Position Statement #1	Brand Position Statement #2	Brand Position Statement #2
Can you own this position completely? Who or what are the risks of that?	All brand statements and variations are on the fifo.com website. We believe those are sufficient for now but if you have any ideas of something new we could add onto the site or substitute what's already on there, please do suggest it.		
Are you able to deliver on your promise?			
How viable is this position over the next decade?			
Are there any technological advancements or industry developments that could undermine your new position?			
How close are any of your competitors to this position?			

Brand Position
Statement

WHAT?

People love stories. Tales of great feats and aspiring achievements by characters just like us. Your **Brand Story** is a powerful emotive way of harnessing your voice to craft a single cohesive narrative. The story of your brand: how it came to be, where it is now, and where it's going.

Your **Brand Story** is unique to you - it can be funny, unexpected, serious, and ambitious... but one thing is for sure, it must spark an emotional reaction. If you can craft a compelling **Brand Story**, your audience will remember who you are. In turn, they'll develop empathy for you, and, ultimately, care about you.

This is your story and should answer why we do what we do, and why are our customers going to choose us.

BRAND STORY

Your **StoryBrand BrandScript** is a powerful resource that will help organize and simplify your message. It offers helpful prompts that will get you thinking about (among other things) your customers, what they want, the problems they face, the guidance you can offer them, and how they define success.

Use your **StoryBrand BrandScript** as a tool to refine your website copy, perfect your sales pitch, craft emails, develop marketing material, and more.

BRANDSCRIPT

At FIFO, we know that you want to be a financially empowered and stress-free business owner. In order to do that, you need to maximize your credits and incentives without the hassle. The problem is that tax laws are complex and time-consuming, which can make you feel overwhelmed and frustrated.

We believe every business owner should easily access the financial benefits they deserve. We understand how confusing and tedious these processes can be, which is why we provide a streamlined, automated platform that simplifies the entire process and offers secure, trustworthy service.

Here's how we do it. First, provide your tax documentation through our secured integration with Taxstatus. Second, we will automatically identify and apply for eligible credits and incentives. Third, receive your maximum financial benefits.

So, start your claim today. And in the meantime, explore how easy it can be to access the credits you deserve, freeing up your time to focus on what matters most – your business.

ONE-LINER

Navigating credits and incentives as a business owner is complex, but with our secure, automated platform and expert review process powered by partnerships with Taxstatus, ID.me, Green Dot, and ChartAPI, you can easily maximize your financial benefits and focus on growing your business.

BRAND VALUES

At the core of your **Brand Strategy**, you will find your **Brand Values**. They are intrinsic to every aspect of your business, not just your marketing materials. They're the defining values that hold you accountable as a business and define what matters to your brand.

BRAND VALUES GROUP EXERCISE

Value	Votes
Trust	2 (Jimmy and Zaheeb)
Security	2 (Jimmy and Zaheeb)
Empowerment	2 (Jimmy and Zaheeb)
Innovation	2 (Jimmy and Zaheeb)
Accessibility	1 (Jimmy)

Value	Description
Trust	A fundamental value in building relationships with customers, especially in an industry where trust is critical due to the sensitive nature of financial data.
Security	Ensuring that customer data and transactions are protected through partnerships with trusted security providers like ID.me.
Empowerment	To support all business owners, including small businesses, self-employed individuals, and those who might otherwise be overlooked, empowering them to claim the benefits they deserve.
Innovation	To leverage advanced technology and automation to simplify processes and provide cutting-edge solutions.
Accessibility	To ensure that the services are easy to use and accessible to all, particularly those who may not have the resources to navigate complex financial systems.

If you had to say it all in one sentence, how would you phrase it? In other words, what does your brand stand for?	At FIFO, we stand for trust, security, and empowerment, ensuring that every self-employed individual can easily access the financial benefits they deserve through innovative, accessible, and reliable solutions.
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Customer Feedback	
Do these values guide your decisions, unite employees, and define your brand?	Yes
Do these values hold executives, employees, and customers accountable?	Yes

WHY?

Answers why your brand exists in the first place. It's the definition of the purpose of your brand, how you plan to fulfill your objectives and customer needs, and where you aim to be.

Your **Mission Statement** defines what your organization does and what you stand for, while your **Vision Statement** speaks to your goals and ideals for the future.

MISSION STATEMENT

Your **Mission Statement** is comprised of 3 parts: what you do, how you do it, and why you do it. Typically, your **Mission Statement** takes your values and turns them into a tangible message that can be transmitted through all your marketing materials.

Not only is your **Mission Statement** a powerful marketing tool, but it can help your brand attract the very best talent and keep them.

What does your company offer?	FIFO offers a platform and service that helps individuals and businesses identify, qualify for, and claim credits and incentives provided by the government, particularly focusing on the Sick and Family Leave Credit.
Who is your audience?	FIFO's audience primarily consists of self-employed individuals, gig workers, independent contractors, and business owners who are likely unaware of or struggle to claim available government benefits and credits.
What problem do you solve?	FIFO solves the problem of complexity and inaccessibility in claiming government-provided financial benefits. Many small businesses and individuals find it difficult to navigate the bureaucratic process and paperwork involved in claiming these benefits.
What makes us unique?	FIFO's uniqueness lies in its use of advanced technology and automation to simplify the process of claiming credits and incentives. Unlike competitors, FIFO integrates trusted security measures like ID.me and partnerships with Green Dot, TaxStatus, and ChartAPI.
What is our contribution or impact?	FIFO's contribution is empowering the "little guy" by leveling the playing field, enabling small entities to claim the financial benefits they deserve, which in turn can support their growth and sustainability in a competitive economic environment.

Rate the following statements. The priority rating cannot repeat. Only one answer can be rated 3 and so on.

Version	Mission Statement	Rating (1-3)
Draft 1	Our mission is to simplify access to government credits and incentives so every business and self-employed individual can get the financial resources they are entitled to.	2
Draft 2	Our mission is to empower businesses and independent workers by automating the process of claiming government incentives for them so they can focus on growth and sustainability.	1
Draft 3	Our mission is to build an accessible, automated platform for self-employed individuals and small businesses to claim their rightful credits and incentives and achieve financial freedom.	3
Draft 4	Our mission is to build an accessible, automated platform for self-employed individuals and small businesses to claim their rightful credits and incentives, simplifying the process of obtaining valuable financial benefits.	Approved.

Mission Statement	Our mission is to build an accessible, automated platform for self-employed individuals and small businesses to claim their rightful credits and incentives, simplifying the process of obtaining valuable financial benefits.
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Customer Feedback	
Does the Mission Statement answer what you do or what is your company's purpose?	yes
Does the Mission Statement answer why you do what you do or why you are in business?	yes
Does the Mission Statement answer who you do it with or who are your customers?	yes
Does the Mission Statement answer how you do it or how you stand out or differentiate from your competitors?	yes

EEC MISSION STATEMENT (EFFICIENT, EFFECTIVE, COMPELLING)

To grow and expand your organization, you'll need to be able to communicate the current status of your company and its future "Efficiently, Effectively, and Compellingly" – to a variety of stakeholders, your customers and suppliers, current and prospective employees, and funders.

What does your company do now, and for whom?	FIFO currently provides a platform that helps individuals and businesses claim government-provided credits and incentives, specifically targeting self-employed individuals, gig workers, and small business owners.
How do you distinguish your company from competitors in the market?	FIFO distinguishes itself by prioritizing transparency and fairness in the claims process. Unlike competitors who may prioritize larger claims, FIFO processes claims on a first-come, first-served basis, ensuring that every client receives timely service regardless of the claim size.
What do you want your company to become in the next five years? Be specific, e.g. size, locations, markets, the employees, the culture, etc.	In the next five years, FIFO aims to become a leading provider of credit and incentive claim services nationwide, with a significant increase in client base. We plan to expand our market to include a broader range of credits and incentives, grow our team, and cultivate a company culture centered on innovation, customer satisfaction, and integrity.
How will you distinguish your company in the market for talented employees?	FIFO will attract top talent by offering a dynamic and supportive work environment where innovation is encouraged and rewarded. We will offer competitive salaries, comprehensive benefits, and professional growth opportunities. Additionally, our commitment to ethical practices and a transparent, inclusive workplace will make us a preferred employer.
How will you get from here to there?	To achieve these goals, FIFO will invest in cutting-edge technology to maintain the efficiency and security of our platform, enhance our marketing strategies to reach a broader audience, and actively recruit skilled professionals. We will also forge partnerships with relevant stakeholders and continuously adapt to changing regulations and market needs to ensure our services remain relevant and valuable.

EEC Mission Statement	We empower self-employed individuals and small business owners to claim government credits and incentives by providing a secure, automated platform, supported by a large network of professionals, that ensures every claim—regardless of size—is processed fairly, efficiently, and with full compliance.
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Customer Feedback	
Does the EEC Mission Statement explain what your business does?	Mostly (current version has been updated)
Does the EEC Mission Statement explain how you deliver distinctive value to your customers?	Yes
Is the EEC Mission Statement efficient, effective, and compelling?	yes, I like the part about how we do not discriminate when it comes to claim amounts especially

VISION STATEMENT

A **Vision Statement** is your company's guiding beacon. It zooms out to give perspective on the overarching reasons for your company's mission. Rather than articulating the specifics of your business operations, the **Vision Statement** describes how your company seeks to impact and improve the world around it.

A **Vision Statement** outlines the company's long-term goals and aspirations for the future in terms of its long-term growth and impact on the world.

Rate the following answers. The priority rating cannot repeat. Only one answer can be rated 10 and so on.

Question	Answer	Priority Rating (1-10)
What is our organization's main purpose?	To empower small businesses and self-employed individuals by providing them with the tools and support needed to claim the financial benefits they deserve, simplifying the process and ensuring fairness.	3
What are our company's main strengths?	Advanced technology and automation, strong security protocols, a commitment to fairness (first in, first out processing), and a deep understanding of government credits and incentives.	5
What are our company values?	Trust, security, empowerment, innovation, and accessibility.	4
Why does what we're building matter?	By making government credits and incentives accessible to all, we are leveling the playing field for small businesses and self-employed individuals, helping them to thrive financially and contribute more effectively to the economy.	6
How do we want to make a difference as a company?	We want to make a difference by ensuring that no one is left behind due to the complexities of claiming financial benefits. Our goal is to democratize access to these benefits, providing a clear and simple path for all eligible individuals and businesses.	7
What is our vision for our company culture?	A culture of innovation, inclusivity, and customer-centricity, where every team member is committed to making a positive impact and continuously improving the services we offer.	8
What are our most ambitious goals?	To become the leading platform for claiming all types of government credits and incentives, expanding our reach globally, and helping millions of small businesses and individuals maximize their financial potential.	9
What impact do we want our company to have on the world?	We want to ensure that financial benefits meant for the public are accessible to everyone, particularly the underrepresented and underserved. By doing so, we aim to contribute to economic equity and financial empowerment on a large scale.	10
What are our company wants? What about company needs?	Wants: To be recognized as the most trusted and efficient platform for government incentives.	2 / 1

	Needs: Continuous innovation in technology, expansion of services, and maintaining strong relationships with partners to ensure the highest level of security and efficiency.	
If our company succeeded in everything it set out to do, how would the world be different?	When FIFO succeeds, the world will be a place where businesses and self-employed individuals have equal access to financial opportunities. The complexities of claiming government benefits will no longer be a barrier, leading to a more equitable distribution of wealth and increased economic stability for millions of people.	10

Vision statement draft 1	Our vision is to create a world where every individual and small business has equal access to the financial benefits they deserve, driving economic equity and empowering communities.
Vision statement draft 2	Our vision is to be the leading force in democratizing financial opportunities, ensuring that no one is left behind due to the complexities of government systems, and fostering a more inclusive and prosperous economy.
Vision statement draft 3	We envision a future where financial empowerment is accessible to all, where our innovative solutions enable millions to claim the benefits they deserve, and where economic opportunity is within reach for everyone.

APPROVED VISION STATEMENT	Our vision is to be the leading force in democratizing financial opportunities, ensuring that no one is left behind due to the complexities of government systems, and fostering a more inclusive and prosperous economy.
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Customer Feedback	
Does the Vision Statement inspire employees, investors, and customers to believe in your company's mission?	yes
Does the Vision Statement present a tough challenge that is not impossible? (A completely unattainable goal isn't a vision, it's a fantasy)	yes
Does the Vision Statement connect your mission to your goals?	yes
Does the Vision Statement include strategic ideas that feel the most relevant and compelling to stakeholders?	yes

EEC VISION STATEMENT (EFFICIENT, EFFECTIVE, COMPELLING)

To grow and expand your organization, you'll need to be able to communicate the direction of your company and its future "Efficiently, Effectively, and Compellingly" – to a variety of stakeholders, your customers and suppliers, current and prospective employees, and funders.

What is the long-term result of your company's efforts?	The long-term result of FIFO's efforts will be the widespread accessibility of all available government credits and incentives, expanding beyond the current Sick and Family Leave Credit to include a comprehensive range of financial benefits. This expansion will help as many people as possible achieve financial freedom, fostering greater financial stability and opportunity for self-employed individuals and small businesses.
How do you envision the world once you have achieved your company's mission?	Once FIFO has achieved its mission, the world will be one where small businesses and self-employed individuals are financially empowered and can thrive without the barriers of complex bureaucratic processes. Economic opportunities will be more equitably distributed, and the financial ecosystem will be more inclusive and supportive of all individuals, regardless of their size or market influence.
What will your vision look like once achieved? Be specific, e.g. size, locations, markets, revenue, recognition, etc.	<p>Size and Locations: FIFO will have expanded its operations globally, with offices in major cities across the United States and key international markets.</p> <p>Markets: We will dominate the market for government credits and incentives, expanding into new areas such as business grants, subsidies, and financial advisory services.</p> <p>Revenue: FIFO will achieve significant revenue growth, driven by a diverse client base and a broad range of services.</p> <p>Recognition: FIFO will be recognized as the leading authority in the field, trusted by millions of clients and respected by industry peers for our innovation, security, and customer-centric approach.</p>
Describe what the culture will become and how it will inspire and reward employees.	<p>Culture: FIFO will foster a culture of innovation, inclusivity, and continuous improvement. Employees will be encouraged to think creatively and take ownership of their work, knowing that their contributions directly impact the company's success and the financial well-being of our clients.</p> <p>Inspiration: Employees will be inspired by the company's mission to make a real difference in people's lives, providing them with the tools and support they need to achieve their financial goals.</p> <p>Rewards: FIFO will offer competitive compensation, opportunities for professional growth, and a supportive work environment that values diversity, collaboration, and excellence.</p>

ECC Vision Statement	FIFO envisions a future where financial empowerment is accessible to everyone, enabling individuals and businesses alike to claim their rightful benefits and achieve financial freedom. As we expand, our commitment to innovation, inclusivity, and excellence will drive us to become the leading authority in the industry, fostering a culture that inspires and rewards our employees while making a meaningful impact on the world.
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Customer Feedback	
Is the EEC Vision Statement ambitious?	yes
Is the EEC Vision Statement future-oriented? (Think 5 years or more from now)	yes
Does the EEC Vision Statement address the business and the culture?	Yes (edited to make more generalized)
Is the EEC Vision Statement efficient, effective, and compelling?	yes

HOW? (MARKETING PLAN)

How are you going to get your brand in front of customers?

TECH STACK

1. Customer Relationship Management (CRM)

HubSpot CRM

Benefits:

- Centralizes customer data and streamlines lead management.
- Automates marketing campaigns, allowing for personalized outreach to different customer segments.
- Tracks customer interactions to ensure consistent engagement.

2. Email Marketing

Mailchimp

Benefits:

- Automates email campaigns to nurture leads with targeted content.
- Offers segmentation and A/B testing for better email performance.
- Provides detailed analytics to optimize engagement with solopreneurs, entrepreneurs, and business owners.

3. Analytics and Reporting

Google Analytics

Benefits:

- Tracks website traffic and user behavior, offering insights into which content drives conversions.
- Measures the effectiveness of marketing campaigns, enabling data-driven decisions.
- Helps identify trends and optimize user experience across FIFO's platform.

4. Content Management System (CMS)

WordPress

Benefits:

- A flexible platform for publishing educational blogs, FAQs, and customer stories.
- SEO-friendly, ensuring FIFO's content is easily discoverable by freelancers and business owners.
- Allows easy updates and integrations with other marketing tools for content optimization.

5. Advertising Platforms

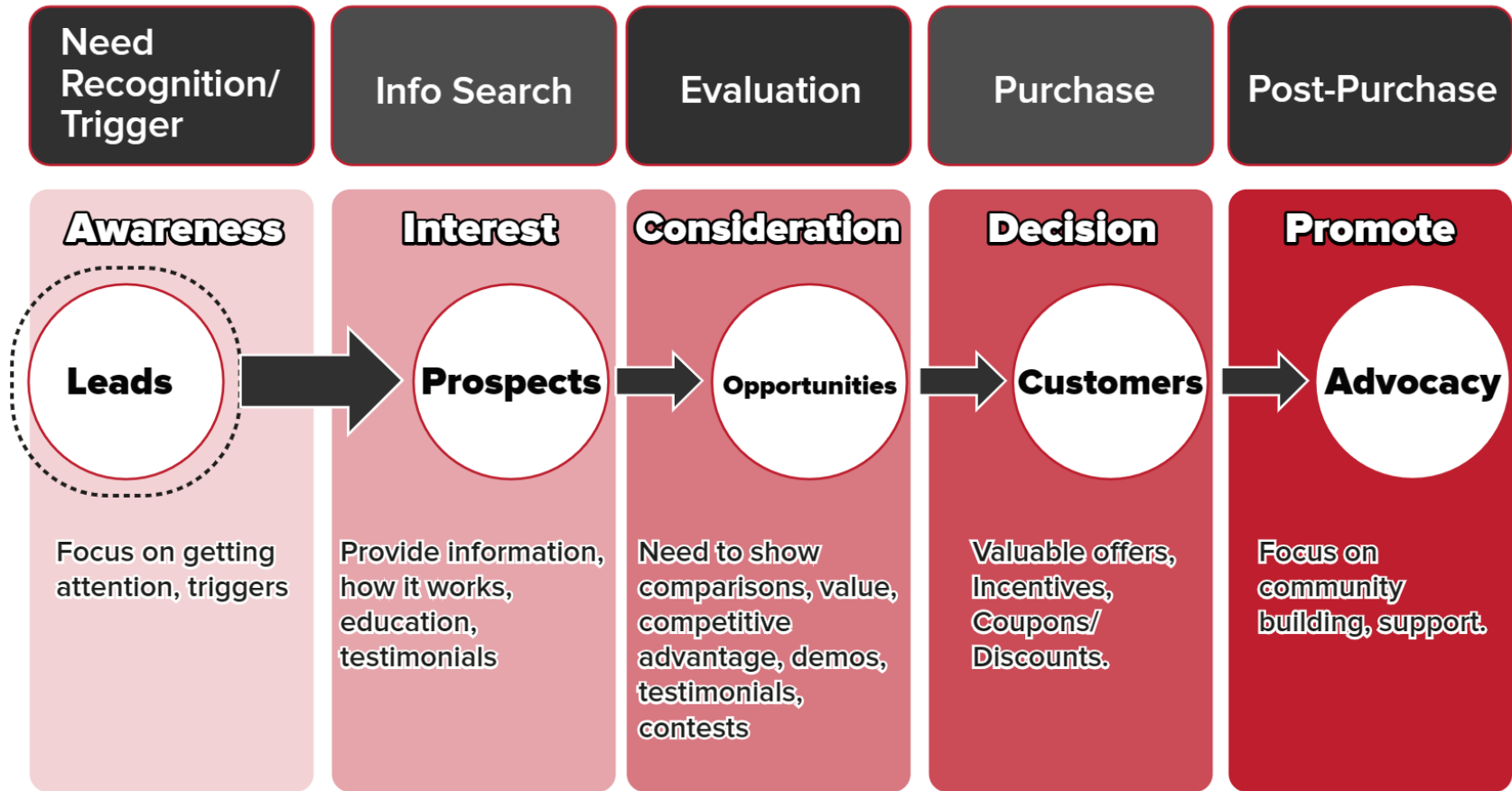
Google Ads & LinkedIn Ads

Benefits:

- Targets high-intent users searching for financial credit solutions.
- LinkedIn Ads specifically targets established entrepreneurs and veteran business owners, helping FIFO reach key decision-makers.
- Provides detailed performance tracking, enabling FIFO to optimize ad spend and maximize ROI.

MARKETING TOOLS

Your **Marketing Tools** detail how you will deliver your message.



Mediums Used Across the Buyer Journey						
Medium	Awareness	Interest	Consideration	Decision	Advocacy	N/A
Traditional Media						
Marketing Material (Flyers, brochures, etc.)	x	x				
Branded Products (Pens, tumblers, etc.)					x	
Social Media						
Facebook	x	x	x	x	x	
Instagram	x	x	x	x	x	
LinkedIn	x	x	x	x	x	
YouTube	x	x	x	x	x	
Online						
Website	x	x	x	x	x	
Outbound						
Email	x	x	x	x	x	
Events						
Events (Booths)	x	x				
Events/Workshops (Public Speaking)	x	x				

CONTENT STRATEGY

Your **Content Strategy** detail how you will deliver the right message, to the right people, at the right time.

PRINT MARKETING MATERIALS

Awareness (TOF)	Interest
<p>Flyers/Brochures</p> <p>Content Focus: A high-level introduction to FIFO, emphasizing the problem (missing out on government credits) and the solution (FIFO's easy-to-use, automated platform).</p> <p>Key Messaging:</p> <ul style="list-style-type: none">• "Maximize your financial benefits with no hassle."• Highlight trusted partnerships like ID.me to build credibility.• Introduce the simplicity of the FIFO platform and the automated process.	<p>Detailed Brochures/Booklets</p> <p>Content Focus: More in-depth information about FIFO's services, features, pricing, and process. Highlight case studies or testimonials from freelancers and small businesses who have benefited from FIFO.</p> <p>Key Messaging:</p> <ul style="list-style-type: none">• "Why leave money on the table? FIFO helps you claim credits securely and automatically."• Comparison tables showing FIFO vs. other methods.• User testimonials or case studies with real examples.• Graphics or screenshots of the platform.

Advocacy

Branded Notebooks/Planners

- Why: Freelancers and business owners often keep track of tasks, financials, and deadlines in planners or notebooks. Offering a branded version reinforces the message of financial empowerment and organization.
- Customization: Add motivational quotes about financial empowerment, the FIFO logo, and useful financial tips or reminders about staying on top of credits and incentives.
- Distribution: Send as a thank-you gift to loyal customers, those who've referred others, or to attendees of industry events and workshops.

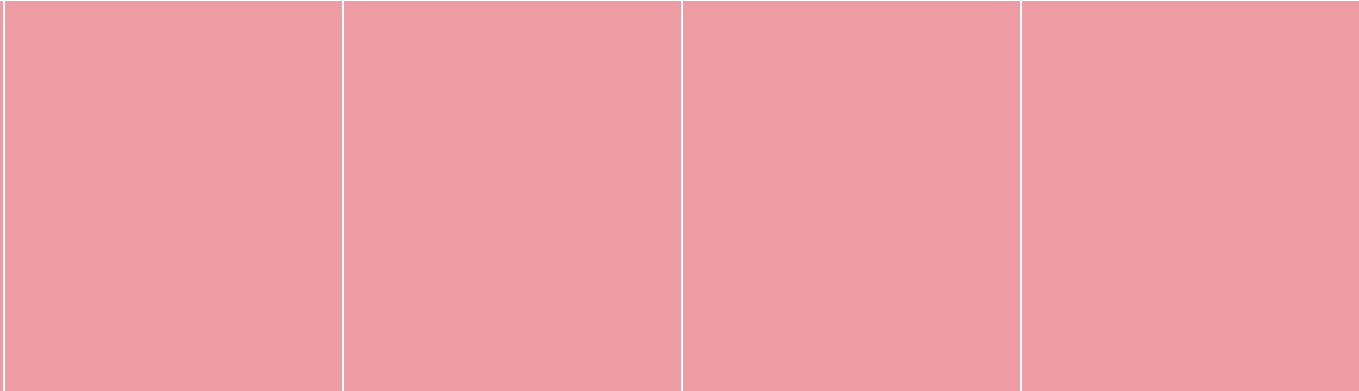
Branded Pens and Desk Accessories

- Why: Desk accessories like high-quality pens, mousepads, or pen holders keep FIFO top-of-mind, especially for freelancers and business owners who are managing their finances.
- Customization: These can include simple messages like "Empower Your Business with FIFO" or "Claim Your Credits with Confidence," along with the FIFO logo.
- Distribution: Provide as part of thank-you kits for advocates or during tax season to promote referrals.

Awareness (TOF)	Interest	Consideration (MOF)	Decision (BOF)	Advocacy
<p>Infographic: “The SETC Myth vs. Reality”</p> <p>Compare the fake SETC with the real Sick and Family Leave Credit that FIFO supports. Emphasize, “Work with real pros, don’t fall for the SETC scam.”</p> <p>Educational Post: “The Truth About Self-Employment Credits”</p> <p>Quote the IRS directly: “In reality, the underlying credit...isn’t called the ‘Self Employment Tax Credit,’ but rather the Sick and Family Leave Credit.” Link to FIFO’s site to learn how to safely claim real credits.</p>	<p>Client Testimonial Video: “How FIFO Helped Me Claim Legitimate Credits”</p> <p>A real client shares how FIFO helped them avoid false claims like SETC and guided them to successfully apply for real credits.</p> <p>Interactive Quiz: “Are You Eligible for the Real Sick and Family Leave Credit?”</p> <p>A quiz to help users determine their eligibility for the legitimate credit, reinforcing FIFO’s credibility.</p> <p>Carousel Post: “Sick and Family Leave Credit: What You Need to Know”</p> <p>A multi-slide carousel explaining key details of the real Sick and Family Leave Credit and who qualifies.</p>	<p>Comparison Post: “FIFO vs. Risky SETC Claims—The Real Way to Recover Benefits”</p> <p>Show how FIFO provides a secure, verified platform to apply for real credits, unlike promoters pushing false SETC claims.</p> <p>FAQ Post: “Can I Really Claim the Sick and Family Leave Credit?”</p> <p>An informative FAQ post answering key questions about eligibility and how FIFO ensures compliance with the IRS.</p> <p>Informative Post: “Why You Should Avoid the SETC and What to Do Instead”</p> <p>Promote a detailed blog post that debunks the SETC myth and explains how FIFO helps you claim legitimate credits without the hassle.</p>	<p>Testimonial Post: “I Trusted FIFO for My Sick Leave Credit”</p> <p>Share a client’s success story about how FIFO helped them successfully claim real benefits while avoiding scams.</p> <p>Step-by-Step How-To Video: “Start Your Claim for the Sick and Family Leave Credit with FIFO”</p> <p>A step-by-step video showing how easy it is to use FIFO’s platform to safely claim the real credit.</p>	<p>Referral Program Post: “Help Your Friends Avoid Scams Like SETC—Refer FIFO!”</p> <p>Encourage satisfied clients to refer others and receive \$50 for every successful referral.</p> <p>Client Spotlight: “Thank You for Trusting FIFO, [Client Name]!”</p> <p>Publicly thank clients who’ve referred others and avoided scams like SETC, emphasizing their smart decision to use FIFO.</p> <p>User-Generated Content Campaign: “How FIFO Helped Me Claim the Right Credits”</p> <p>Encourage customers to share their stories about how FIFO protected them from false claims and helped them recover real credits.</p>

Awareness Video: “Don’t Be Fooled by Fake Tax Credits”

A short video explaining the difference between fake credits like SETC and legitimate credits like the Sick and Family Leave Credit.



Awareness (TOF)	Interest	Consideration (MOF)	Decision (BOF)	Advocacy
<p>Hero Banner: “Avoid the SETC Scam—Trust the Experts at FIFO”</p> <p>An eye-catching homepage banner warning visitors about fake tax credits and promoting FIFO’s trusted service.</p> <p>Landing Page: “What You Need to Know About Sick and Family Leave Credits”</p> <p>A dedicated page explaining the legitimate credits FIFO supports, linking to the IRS article.</p> <p>Educational Blog: “Debunking the SETC Myth: What Freelancers Should Know”</p>	<p>Comparison Page: “Real Credits vs. SETC—Get the Facts”</p> <p>An in-depth comparison of fake credits like SETC vs. legitimate credits, positioning FIFO as a trusted solution.</p> <p>FAQ Section</p> <p>A comprehensive FAQ page addressing eligibility for the credit and FIFO’s process.</p> <p>Calculator Tool: “How Much Could You Claim with the Sick and Family Leave Credit?”</p> <p>An interactive tool that helps visitors estimate how much they could recover through legitimate credits.</p>	<p>Case Study Page: “How [Client Name] Saved \$X with FIFO’s Sick Leave Credit Service”</p> <p>Real-life examples of clients who successfully claimed credits with FIFO, including testimonials and results.</p> <p>Pricing Page: “Transparent Pricing for Financial Credit Services”</p> <p>A clear, transparent pricing page detailing the costs and benefits of using FIFO.</p> <p>Video Walkthrough: “See How Easy It Is to File with FIFO”</p> <p>A step-by-step video on how to sign up and apply for the Sick and Family Leave Credit using FIFO’s platform.</p>	<p>Trust Badge Section: “Why You Can Trust FIFO—Backed by ID.me & IRS Compliance”</p> <p>A section showcasing FIFO’s security credentials and partnerships with trusted organizations like ID.me.</p> <p>Customer Reviews Section: “What Our Clients Say About FIFO”</p> <p>A scrolling section with client testimonials and reviews, reinforcing trust before visitors make a decision.</p>	<p>Client Portal Feature: “Track Your Claims and Share Your Experience”</p> <p>A portal feature that encourages users to share feedback and their positive experiences directly from their dashboard.</p>

A blog post breaking down the SETC scam, backed by quotes from the IRS.

EMAIL

Awareness (TOF)	Interest	Consideration (MOF)	Decision (BOF)	Advocacy
<p>Subject: “Don’t Fall for the SETC Scam—Get Real Financial Benefits”</p> <p>Educate subscribers about the SETC scam, quoting the IRS, and introduce FIFO as the trusted platform to claim legitimate credits.</p>	<p>Subject: “Is the Sick and Family Leave Credit Right for You?”</p> <p>Provide detailed eligibility criteria for the credit, encouraging users to check their status with FIFO’s free assessment tool.</p>	<p>Subject: “Get the Most Out of Your Sick and Family Leave Credit”</p> <p>Offer a case study of a real customer who successfully claimed credits using FIFO, reinforcing the platform’s value.</p>	<p>Subject: “Here’s What Our Clients Are Saying About FIFO”</p> <p>Share customer reviews and success stories, focusing on how FIFO has helped others recover thousands in credits.</p>	<p>Subject: “Thank You for Trusting FIFO—We Appreciate You!”</p> <p>Send a thank-you email to loyal clients who have successfully claimed credits, reinforcing their positive experience with FIFO.</p>
<p>Subject: “Are You Missing Out on Sick and Family Leave Credits?”</p> <p>Explain what the Sick and Family Leave Credit is, who qualifies, and how FIFO helps recover real benefits.</p>	<p>Subject: “See How FIFO Helps You Claim Real Financial Benefits”</p> <p>Share customer testimonials and a video walkthrough of the FIFO platform to build trust.</p>	<p>Subject: “Claim Your Sick and Family Leave Credit with FIFO—Here’s How”</p> <p>Provide a step-by-step guide on how to sign up and apply for the credit, along with a reminder of important deadlines.</p>	<p>Subject: “Let’s Make This Easy—Claim Your Credits With FIFO”</p> <p>Emphasize the simplicity of using FIFO’s platform, including a direct link to start the claim process immediately.</p>	<p>Subject: “Share Your FIFO Success Story!”</p> <p>Invite customers to share their positive experiences and results with FIFO for a chance to be featured on the website or social media.</p>
<p>Subject: “Recover Thousands in Credits—Without the Hassle”</p> <p>Highlight how many freelancers and small businesses miss out on</p>	<p>Subject: “Avoid Scams: Why SETC Isn’t Real, and What You Should Do Instead”</p> <p>Educate subscribers on the risks of false claims, while positioning FIFO as the expert in real credits.</p>	<p>Subject: “Why FIFO is the Right Choice for Recovering Your Credits”</p> <p>List FIFO’s key advantages over competitors, including security, ease of use, and verified partnerships.</p>		

financial credits and how
FIFO simplifies the process.

EVENTS (BOOTHS)

Awareness (TOF)	Interest
<p>Infographic Display: “The Truth About the SETC Scam”</p> <ul style="list-style-type: none">A large, eye-catching infographic debunking the SETC myth, with a call to learn more about legitimate credits.	<p>Success Story Board: “How FIFO Helped [Client Name] Recover \$X”</p> <ul style="list-style-type: none">Display boards or posters featuring real client testimonials and success stories to build trust and interest.

EVENTS (WORKSHOPS)

Awareness (TOF)	Interest
<p>Presentation: “Debunking the SETC Myth and Finding Real Credits”</p> <ul style="list-style-type: none">A short, engaging presentation that educates attendees on the dangers of the SETC scam, using real IRS quotes, and introduces the Sick and Family Leave Credit as a legitimate alternative. <p>Handouts: “5 Steps to Avoiding Tax Credit Scams”</p> <ul style="list-style-type: none">Provide attendees with a one-pager listing tips on avoiding tax credit scams, promoting FIFO as a trusted resource.	<p>Workshop: “How to Maximize Your Sick and Family Leave Credit”</p> <ul style="list-style-type: none">Host a hands-on workshop that walks participants through the process of determining eligibility and using FIFO to claim the Sick and Family Leave Credit. <p>Panel Discussion: “The Future of Freelance Tax Credits”</p> <ul style="list-style-type: none">Invite tax experts to discuss legitimate tax credits for freelancers, positioning FIFO as the go-to platform for self-employed financial benefits. <p>Interactive Demo: “Using FIFO’s Platform in Real-Time”</p> <ul style="list-style-type: none">Show participants a live demo of how to use the FIFO platform, highlighting ease of use and security, with a Q&A session afterward.

Customer Feedback

<p>How well does the content strategy for each stage of the buyer’s journey address customer needs?</p>	<p>Extremely well, I love the depth of this and the “war against SETC” is well done</p>
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BRAND MESSAGE

Your **Brand Message** is what you're trying to communicate to your audience to sell your product or service, and how you communicate it to them through verbal and non-verbal messages. It acts as a framework on which to base all your external communications.

It should reflect your **Brand Values, Mission Statement, Brand Story, and Brand Position**. It covers everything from your website and advertising copy and industry pitches, to how your staff greets your customers on the telephone or signs off on emails.

Your **Brand Message** is the difference between greeting customers with a 'Hey there!' or a 'Good morning'.

This is where you can inform your audience about your intentions: are you revenue driven or do you hold morals above profit? Do you take pride in providing a quick and seamless service or are you more concerned with a handcrafted bespoke product?

A strong, easy-to-comprehend **Brand Message** ensures that all the words and phrases used in your branding, and everything that your company is communicating to people, adheres to your core messages. The devil is in the detail with this stuff, and as a marketing and consulting agency, we find ourselves spending longer than we would like to admit mulling over whether un-capitalizing the first letter at the start of a sentence on a website will enhance your **Brand Message** or not.

Examples of Brand Messages		
Your company name	Social media posts	Marketing material
Slogans or taglines	Infographics	How your staff greets customers
Copy on your website	Adverts	

Your **Brand Message** serves to:

- Communicate your **Brand's Values** and beliefs.
- Promote your product or service to a customer in a compelling way.
- Build your brand through words rather than visuals, and consistency.

VALUE PROPOSITION

Your **Value Proposition** should be a complete sentence and you should have multiple **Value Propositions** that speak to each of your **Buyer Persona Profiles**.

The goal is to collect the *most essential* elements of your key messaging statements and leverage them to craft clear statements that define your value.

It's important here to speak directly to your **Buyer Persona**. Don't hesitate to show them that you know exactly who they are, what their pain points are, and how your product can help solve those pain points.

Once you've got these statements nailed down, you'll have a whole range of Brand Messages to work with.

One-Liner Value Proposition	
Freelancers & Gig Workers	As a freelancer or gig worker, we help you claim the financial credits you deserve with a simple, automated platform, so you can focus on your passion without worrying about missed opportunities or government processes.
Established Entrepreneurs	As a growing small business owner, we ensure you receive the financial credits and incentives you're eligible for, with expertise and automation to keep you compliant as you scale.
Veteran Business Owners	For experienced business owners, we simplify financial management by helping you access essential credits and incentives while allowing you to focus on long-term business success and wealth preservation.

XYZ Value Proposition	
Freelancers & Gig Workers	We help freelancers and gig workers secure the financial credits they qualify for by simplifying the application process through our automated, accessible platform.
Established Entrepreneurs	We help established entrepreneurs optimize their business finances by ensuring they claim available financial credits and stay compliant with regulations.
Veteran Business Owners	We help veteran business owners optimize their financial management by providing an efficient, automated solution to access essential credits and maintain long-term financial stability.

Customer Value Proposition (CVP)	
Freelancers & Gig Workers	To help freelancers and gig workers access the financial credits they are eligible for, we provide an automated platform that removes the barriers of confusing government rules and regulations.
Established Entrepreneurs	To help established entrepreneurs manage their growing business finances, we help you claim all available financial credits with expert guidance and automation, so you stay compliant as your business scales.
Veteran Business Owners	To help veteran business owners maintain financial stability, we help you access essential credits, providing an automated solution that supports long-term success without overwhelming complexity.

Customer Feedback	
Value Proposition	Rating from 1 (lowest) to 5 (highest)
How well does the One-Liner connect with the buyer persona's identity, needs, and pain points?	5
How well does the XYZ Method connect with the buyer persona's identity, needs, and pain points?	5
How well does the CVP Formula connect with the buyer persona's identity, needs, and pain points?	5

Freelancers & Gig Workers		
Feature	Advantage	Benefit
Automated credit eligibility assessment	Quickly identifies the financial credits you qualify for	Saves time and ensures you are aware of all opportunities to boost your financial welfare
Simple, user-friendly platform interface	Easy navigation without requiring financial expertise	Reduces stress and allows you to focus on your work while managing your finances with confidence
Secure verification through ID.me	Trusted by the IRS for compliance and security	Provides peace of mind that your personal information is protected while you access critical financial credits

Established Entrepreneurs		
Feature	Advantage	Benefit
Comprehensive financial credit tracking	Identifies all relevant credits based on your business activity	Maximizes your savings potential, ensuring you capitalize on all available financial opportunities for growing your business
Automated compliance management	Keeps your business aligned with the latest government regulations and requirements	Reduces the risk of errors or penalties, giving you peace of mind as your business scales
First in, first out processing system	Ensures fair treatment of all claims without prioritizing larger businesses	Provides transparency and equal access, so your business's financial needs are treated with integrity.

Veteran Business Owners		
Feature	Advantage	Benefit
Automated platform for identifying eligible financial credits	Check your eligibility for financial credits and incentives	Make sure you have access to the credits you deserve, helping you maintain financial stability over the long term
Secure ID.me verification process	Provides IRS-approved, secure authentication for your business information	Protects your sensitive financial data while ensuring compliance with government standards
First in, first out processing system	Treats all businesses equally, without prioritizing larger claims over smaller ones	Guarantees that your claims are processed fairly

Brand Messages (So That Strategy)	
Freelancers & Gig Workers	FIFO offers an automated platform for identifying eligible financial credits so that freelancers and self-employed professionals can focus on their work without worrying about complex government processes.
Freelancers & Gig Workers	FIFO uses a simple, user-friendly interface so that freelancers and self-employed professionals can easily navigate the platform and manage their finances with confidence.
Freelancers & Gig Workers	FIFO provides secure verification through ID.me so that freelancers and self-employed professionals can access financial credits knowing their personal information is protected.
Established Entrepreneurs	FIFO offers comprehensive financial credit tracking so that entrepreneurs can maximize savings by accessing all available financial credits.
Established Entrepreneurs	FIFO provides automated compliance management so that entrepreneurs can stay aligned with government regulations and avoid penalties as their business grows.
Established Entrepreneurs	FIFO operates a first-in, first-out processing system so that entrepreneurs receive fair treatment, with no favoritism based on business size.

Veteran Business Owners	FIFO offers an automated platform that continuously identifies eligible financial credits so that business owners can maintain long-term financial stability.
Veteran Business Owners	FIFO uses secure ID.me verification so that business owners can protect their sensitive financial data while ensuring compliance with government standards.
Veteran Business Owners	FIFO uses secure ID.me verification so that business owners can protect their sensitive financial data while ensuring compliance with government standards.

BRAND MESSAGING PILLARS

Brand Pillars differentiate a brand and refer to the things that customers perceive to be either valuable or unique about a brand. For example, loyal customers might credit your innovation or friendly manner.

A huge benefit of the **Brand Pillars** is that they will help you identify phrases, slogans, and keywords you can use across your entire marketing strategy.

Pillar 1	Pillar 2	Pillar 3
<p>Trust and Security</p> <p>FIFO prioritizes security and compliance, providing a trusted platform where freelancers and business owners can safely and confidently access financial credits.</p>	<p>Fairness and Transparency</p> <p>FIFO operates with a commitment to treating all claims equally, regardless of the size or scale of the business, and provides clear, transparent communication at every step.</p>	<p>Accessibility and Simplicity</p> <p>FIFO helps small business owners unlock financial credits they're entitled to, removing the barriers that make the process complicated and ensuring they receive the benefits they deserve.</p>
<p>Proof Point 1</p> <p>ID.me verification provides an additional layer of security, ensuring only legitimate claims are processed.</p>	<p>Proof Point 1</p> <p>Our first-in, first-out processing guarantees that claims are handled in the order they are received, without prioritizing larger businesses over smaller ones.</p>	<p>Proof Point 1</p> <p>Our platform streamlines the application process, helping users claim financial benefits regardless of their financial background or expertise.</p>
<p>Proof Point 2</p> <p>Our partnerships with trusted organizations build credibility and reassure users.</p>	<p>Proof Point 2</p> <p>Clients are always informed of pricing and timelines upfront, ensuring there are no hidden fees.</p>	<p>Proof Point 2</p> <p>User-friendly interface ensures that clients can navigate the platform without needing external assistance or expertise.</p>
<p>Proof Point 3</p> <p>Continuous monitoring of government regulations ensures that the platform remains compliant with changing policies, protecting clients from errors or penalties.</p>	<p>Proof Point 3</p> <p>We provide clear, straightforward guidance so clients can confidently navigate each step, from checking eligibility to receiving credits—no hidden complexities or confusion.</p>	<p>Proof Point 3</p> <p>Secure ID.me verification, backed by the IRS, guarantees trustworthy and safe access to government credits.</p>

Customer Feedback

Does each tier of the pillar support the next?	yes
Are there opportunities to cut, condense, or inject more emotion?	it could potentially be worded more to appeal to peoples desire to get what is essentially free money – updated.
Is how you do, what you do, communicated clearly?	yes
Are the benefits your company brings clear and consistent?	yes

BRAND PROMISE

Your **Brand Promise** describes the experience your customer should expect to have every time they interact with your brand. It distills all the earlier stages of the messaging hierarchy into a single statement. It is the most refined of all stages.

Brand Promise Drafts

Draft 1	At FIFO, we promise to make accessing financial credits simple, secure, and transparent for business owners and self-employed professionals.
Draft 2	FIFO makes sure that every client can confidently claim the financial credits they deserve through a trusted, fair, and automated platform.
Draft 3	We provide an accessible and secure platform that removes the complexity from financial credits, empowering small business owners and freelancers to maximize their financial benefits.

Brand Promise

We provide an accessible and secure platform that removes the complexity from financial credits, empowering small business owners and freelancers to claim the benefits they are legally entitled to and maximize their financial potential.

Customer Feedback

Does the Brand Promise share one common benefit or characteristic that all your customers will experience?	yes
Does your Brand Promise reflect the overwhelming impression customers will be left with?	yes

BRAND VOICE & TONE

Your **Brand Voice** is the personality your brand takes on in all of its communications. Your voice serves as a guide of what to say and how to say it. It must be consistent across all communications no matter which teams are handling which channels. It must never change.

You want customers to get to know, love, and remain loyal to your company's personality, as they would an old friend. And old friends generally remain constant; they don't chop and change their personalities or do unexpected things.

Your **Brand's Tone** is the emotional response of your **Brand Voice**. You make it appropriate to the situation that you're communicating or writing about. It demonstrates that you understand what your **Buyer Persona** is feeling and can empathize appropriately.

Referring to the old friend analogy, you also know how they respond to life events, saying different things in different situations: at a party, at work, with parents, with children, in a crisis, or at a funeral. This is their tone, which they adapt to each situation – their personality remains the same.

BRAND TONE AND VOICE OVERVIEW

The brand voice and tone guidelines for FIFO emphasize a blend of professionalism, trust, and accessibility. Here's a detailed breakdown:

Friendly vs. Corporate/Professional: The tone is 70% corporate/professional and 30% friendly. This balance ensures that FIFO communicates with authority while maintaining a personable and approachable demeanor. It's designed to reassure clients that they are dealing with a reliable and knowledgeable service while also making them feel comfortable.

Spontaneous and High Energy vs. Careful Thinking and Planning: The tone leans heavily toward 80% careful thinking and planning with 20% spontaneity. FIFO's messaging should reflect that every decision is well thought out, prioritizing precision and compliance, while still occasionally injecting a sense of energy to create engagement.

Modern vs. Classic: FIFO's style is predominantly 90% modern with 10% classic influences. The brand projects itself as a forward-thinking, innovative solution, but retains a touch of timeless professionalism to ensure stability and trustworthiness.

Sales Focused vs. Value Driven: The tone is 50% sales-driven and 50% value-driven. This equal balance reflects FIFO's dual goals: to motivate freelancers and business owners to take action, while emphasizing the inherent value and benefits of their service.

In addition to these ratios, the brand emphasizes:

- **Education and Transparency:** Messaging must be clear, upfront, and educational, particularly about fees, processes, and timelines.
- **Trust and Security:** The tone should stress the safety and reliability of the platform, using compliance-focused language to deter scammers and highlight FIFO's secure processes.
- **Reputation and Professionalism:** The service must feel personal and trustworthy, avoiding gimmicks or exaggerated promises, while consistently promoting transparency and a reputation for quality.

This combination ensures that FIFO comes across as a modern, reliable, and professional brand that values integrity and client trust.

TONE OF VOICE ASSESSMENT

Friendly	Corporate/Professional
70%	30%
Spontaneous/High Energy	Careful Thinking and Planning
20%	80%
Modern	Classic
90%	10%
Sales Focused	Value Driven
50%	50%

BRAND VOICE CHART

Because We Value	Our Voice Is	This Means Our Communication Is	This Means We Are Not
Trust	Dependable	Transparent Honest Straightforward	Gimmicky Vague Exaggerated
Security	Thoughtful	Compliance-focused Protective Reliable	Careless Overpromising Overly Casual
Empowerment	Supportive	Encouraging Educational Clear	Discouraging Confusing Complex
Innovation	Forward-thinking	Modern Dynamic	Outdated Overly Traditional
Accessibility	Approachable	Respectful Inclusive	Exclusive Conceited

BRAND TONE PROFILE

Voice Characteristics	Description	Do	Don't	Example
Dependable	Our communication builds trust by being reliable, transparent, and honest, ensuring clients know they can count on us.	Provide clear, factual information. Address concerns with direct and accurate answers.	Don't make vague promises. Avoid using exaggerated or overhyped language.	"We've partnered with trusted organizations like ID.me to ensure your data is always secure, providing a worry-free experience."
Thoughtful	We take a careful, compliance-driven approach, showing that we are precise and deliberate in everything we do.	Explain processes step-by-step to show attention to detail. Use measured, compliance-focused language.	Don't rush through explanations or be overly brief. Avoid being too casual or leaving out important details.	"Our automated system ensures all necessary steps are followed, so your claim is handled with the utmost care and compliance."
Supportive	We empower clients with education and guidance, making them feel understood and encouraged throughout the process.	Use encouraging and clear language to guide clients. Offer practical advice and tips.	Don't be condescending or overly technical. Avoid using language that feels overly complex or intimidating.	"We're here to help you through each step, making sure you feel confident in understanding and accessing your financial credits."
Forward-thinking	We embrace innovation to provide modern solutions, focusing on fairness and efficiency without overpromising speed.	Highlight the benefits of automation and how it ensures fairness. Encourage clients to apply early, explaining that the sooner they apply, the sooner their claims will be processed.	Don't make claims about how fast the process is. Avoid language that suggests preferential treatment or expedited services.	"With our first in, first out process, we ensure that all claims are handled fairly, without prioritizing larger claims. The sooner you apply, the sooner we can begin processing your claim."
Approachable	We make complex systems easy to understand, using a tone that is friendly yet professional to foster trust while maintaining boundaries.	Use simple, clear language. Maintain a professional but welcoming tone.	Don't oversimplify to the point of being condescending. Avoid using overly casual or informal language.	"We've designed our platform to be easy for you to use, so you can understand your eligibility without getting bogged down by complex terminology."

