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A six-month, US-focused marketing engagement, coached.

Consultant proposal, prepared for Profitual's Export Funding NB application: strategic guidance, weekly accountability, and a measured entry into the United States market.

Export Funding NB eligible · grant covers 65% of the program

Prepared for

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Confidential

ENGAGEMENT OVERVIEW

Growth for Profitual, aimed at the *US market*.

Profitual gives business owners clarity on their numbers. This proposal gives Profitual clarity on its growth: a six-month coaching engagement aimed squarely at the US market: your team executes, we steer, and a weekly scoreboard tracks the push stateside in numbers. Built to carry Profitual beyond startups to American business owners and the accounting firms that advise them, and around one non-negotiable rule that hasn't moved since our first call: prove the ROI before scaling the spend.

Engagement model	Advisory / coaching: Profitual's team executes, Brand Butter provides strategic direction and weekly accountability
Term	Six months
Primary objective	US market entry: American owner-led businesses and the accounting & bookkeeping firms that advise them
Consulting fee	\$1,833/month × 6 = \$11,000
Advertising budget	\$2,000/month × 6 = \$12,000, paid by Profitual directly to ad platforms (zero markup)
Program total	\$23,000 CAD
Export Funding NB contribution (65%)	\$14,950
Profitual's share (35%)	\$8,050 over six months
Reporting	Weekly meetings; KPIs baselined in week one and segmented by market, with US activity and results tracked for EFNB reporting

A strong company with a quiet megaphone.

Ray, this is the revised plan from Thursday's call, rebuilt around what you, Tim and Craig actually asked for. The fundamentals haven't changed: what's missing isn't product, cash, or conviction. It's a consistent system, and now, the accountability to run it. One thing has sharpened since: with Export Funding NB behind the program, the engagement's centre of gravity is formally the US market, and everything below is aimed, and measured, accordingly.

\$750k

Cash reserves. Patience without complacency.

\$400k

ARR, built cash-flow efficient.

3–4 yrs

Runway. Time to grow deliberately, not desperately.

65%

Of the program covered by Export Funding NB. Your share: \$8,050 over six months.

“We want expert guidance and accountability, not an agency doing the minimum.”

So this is a coaching engagement, not a retainer for deliverables. Your team executes, we steer, and yes, we will breathe down your necks about the to-do list. You asked us to, and we're taking you up on it.

“We'd rather drip-feed features than bet everything on one big launch.”

Couldn't agree more, and frankly it was our read too. Launches are one loud day; a drip-feed of features, each wrapped in education, builds awareness that compounds. The plan below has no fireworks in it, on purpose.

“Selling software is about trust. People need to be educated first.”

This is the thesis of our whole plan. Education isn't a marketing tactic for Profitual. It's the product's front door, and we intend to build the whole engine around it.

It was never a channel problem. It's a *system* problem.

Cold outreach at \$4k a month, webinars, promotions: each was a solo act with no supporting cast. Here's what was actually breaking, and why it's very fixable.

Finding No. 1

Leaks, not droughts

Webinars pulled real signups. Then nothing followed them: no nurture, no structured path from curious to customer. The top of your funnel worked; the middle didn't exist.

Finding No. 2

Aimed at empty wallets

The early startup ICP meant winning buyers who couldn't afford to stay. Established owner-led businesses have the problem and the budget, and the accounting firms and bookkeepers who serve hundreds of them multiply every win.

Finding No. 3

Spend without a scoreboard

You paid for activity, not evidence. Without attribution and reporting, every dollar felt like a gamble, so scaling spend never felt justified. We fix the scoreboard first.

Five moves. One *compounding engine*.

Same five pillars, new division of labour, and one explicit destination: the United States. We bring the map and the judgment, your team drives, and the weekly meeting checks the odometer. Sharper US targeting feeds the drip, the drip feeds trust, trust fills the pipeline, and the scoreboard proves what deserves more fuel, with every metric cut by market so the stateside push is visible on its own line.

Pillar 01

US Market Entry: ICP & Positioning

Two weeks of working sessions with your team to define who Profitual serves in the US market, in tiers rather than a blur: primary, American owner-led businesses with real revenue that want to be intimate with their numbers; secondary, US accounting and bookkeeping firms, who are both customers and a distribution channel, since one firm advises dozens of businesses. We map the entry wedge (which states, which verticals, which firm profiles first) and rebuild messaging around their language so every later tactic has a clear American target.

US-tiered ICP

Market-entry wedge

Owner & advisor messaging

Sales-ready narrative

Pillar 02

Drip-Feed, Not Fireworks

You called this one yourselves: no high-stakes launch. Features ship when they're ready and reach the US market on a steady drip calendar, each one wrapped in education, a short video, a webinar segment, a use-case story, so awareness compounds instead of spiking. We build the calendar and the templates with you; your team runs the cadence; the weekly meeting keeps it honest. And expectations go in writing before anything moves, so nobody grades week one against month six.

Drip calendar

Feature education

Webinar cadence

Video packaging

Expectation benchmarks

Pillar 03

The Trust Engine

You said it yourself: software is sold on trust, and trust is built through education. We hand your team the system to turn customers into proof: a testimonial pipeline, case-study templates, an education content calendar, and a full SEO overhaul delivered as a prescription, we audit, you implement, nobody invents an agency dependency where none is needed. Everything reviewed in the weekly meeting, and every asset doubles as credibility for conversations with partners like Mastercard and Visa.

Testimonial pipeline

Case-study templates

Education calendar

SEO overhaul (prescribed)

Playbooks, not black boxes

Pillar 04

Ad Spend, With Adult Supervision

The \$2,000/mo ad budget stays in your hands, paid straight to the platforms. What we bring is the judgment the budget can't buy: where US intent lives (geo-targeted search on the terms American buyers actually type, webinar registration, retargeting), what to run, and, the call that saves the most money, when to kill or pivot an underperforming campaign, decided together in the weekly meeting. Your cold-outreach expert keeps doing what's already working; we coordinate rather than replace. Nothing spends until tracking is validated, and nothing scales until the scoreboard says so.

Your budget, your accounts

Kill-or-pivot calls

High-intent targeting

Nurture playbooks

Zero markup

Pillar 05

The Weekly Scoreboard

A standing weekly meeting built around numbers a CFO would respect (fitting, given your product): pipeline created, cost per qualified lead, webinar-to-trial conversion, and this week's to-dos on both sides of the table. We define the metrics and baseline them in week one, segmented by market, so US activity and US results sit on their own line, exactly the stats Export Funding NB wants to see. How you track them is your call, a shared sheet does the job, and if your team wants a live dashboard, that's yours to build and own. Accountability runs both directions: we chase your team's homework, you grill our recommendations. Spend scales only when the numbers earn it.

Weekly meeting

US-segmented metrics

Kill / scale decisions

Accountability both ways

No big bang. A six-month drip, on a *weekly beat*.

WHEN	PHASE	WHAT HAPPENS
On approval	Paperwork & the grant	You approve the revision, Craig files the Export Funding NB application (this proposal and the export plan attach to it), and we set the start date together. Where program guidelines allow, we begin while the application processes.
Week 1	Kickoff & baselines	KPIs defined and baselined, US metrics on their own line for EFNB reporting, the standing weekly meeting locked in the calendar, and the first ICP working session on the books. Month six gets compared to this week, in numbers.
Weeks 2–4	Positioning & the playbooks	US ICP tiers, entry wedge and messaging locked, drip calendar built, trust-engine templates handed over, and ad guidance goes live once tracking is validated, your \$2,000/mo, our steering.
Months 2–3	Drip & learn	Features drip to the US market wrapped in education, webinars run on cadence, testimonials accumulate, and every week the ads get a kill-or-pivot review before the next dollar moves.
Months 4–6	Compound & decide	Scale what the numbers prove, cut what they don't, and make the fork-in-the-road call you suggested yourself: keep the coaching model, or stack an execution contract where your team needs hands, not just steering.

Priced for proof, built to scale.

One engagement, one ad budget, and a grant that covers most of both. All figures CAD over a six-month term: \$11,000 in coaching, \$12,000 in ad spend you pay straight to the platforms, \$23,000 total, of which Export Funding NB covers 65%. Your actual outlay: \$8,050. That's the whole page, but open it anyway.

The Advisory — the engagement

\$1,833/mo · 6 months · \$11,000 total

Coaching, not a black-box retainer. Your team executes; we steer, weekly.

- ✓ Standing weekly meeting: performance review, kill-or-pivot calls, next week's to-dos, both sides accountable
- ✓ Metrics framework: KPIs defined and baselined in week one, tracked however your team prefers
- ✓ ICP & positioning working sessions (month one)
- ✓ Playbooks handed over: drip calendar, trust engine, nurture, SEO prescription
- ✓ Ad oversight: targeting, creative direction, when to kill, when to scale
- ✓ Direct access to Matt & Andrew between meetings

The Ad Budget

\$2,000/mo · 6 months · \$12,000 total, paid directly to ad platforms

Your money, your accounts, paid straight to the platforms. Zero markup, ever.

- ✓ High-intent mix: search, webinar registration, retargeting
- ✓ Nothing spends until tracking is validated
- ✓ Weekly kill-or-pivot review before the next dollar moves
- ✓ Scales up, or down, on cost-per-qualified-lead evidence
- ✓ Counts toward the Export Funding NB program total

The Export Funding NB math – what Profitual actually pays

\$8,050 over six months ($\approx$ \$1,342/mo, coaching and ad spend included)

The program funds projects up to \$23,000 with the client covering 35%. This plan lands exactly on the cap, so the grant does the heavy lifting: roughly \$1,342 a month, coaching and ad spend included.

- ✓ Program total: \$23,000 (\$11,000 coaching + \$12,000 ad spend)
- ✓ Export Funding NB covers 65%: \$14,950
- ✓ Profitual's share: \$8,050 (35%)
- ✓ Craig files the EFNB application on approval, with this proposal and the export plan attached; we supply whatever the paperwork needs, same day
- ✓ Start date set together; engagement can begin while the grant processes, where guidelines allow

If the team ever needs hands, not just steering: execution can be stacked on later as its own contract, your suggestion, and a good one. The weekly meetings will tell us if and when. Start as coaching; upgrade on evidence, like everything else in this plan.

Numbers negotiable in structure, never in accountability. The weekly scoreboard is the one non-negotiable, because you shouldn't have to take our word for anything.

06 • WHY BRAND BUTTER

Strategy first. *Everything else follows.*

We've done the homework

This proposal was built from your numbers, your channels, your ICP shift, and your launch date. Expect the same specificity every month, not templates with your logo pasted on.

Senior heads, no telephone game

You talk directly to the people steering, on a standing weekly call. Course corrections happen before money burns, not in a quarterly review after it has.

Aligned with your caution

You want ROI proven before spend scales. So do we: our best clients are the ones who grew because the scoreboard said so. We win when the numbers win.

Three steps to *momentum*.

1

Approve the revision

This is the proposal rebuilt for the Export Funding NB program: same coaching model and weekly cadence, now explicitly aimed at the US market as the application requires. If it matches what we agreed, hit approve.

2

File the EFNB application

Craig completes and submits the Export Funding NB paperwork, with this proposal and the export plan attached; we supply anything it needs from our side, same day it's asked for.

3

Kickoff & first weekly

Start date set together, baselines recorded, and the first standing meeting books the next twenty-five. Where program guidelines allow, we start while the grant processes.

Momentum, not fireworks.

Ray, you asked for a coach that holds your feet to the fire, not an agency that disappears into deliverables. That's exactly what this is. Approve it, and let's get the grant moving.

Matt Daigle

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