



GOOD BRANDS, GONE RAD.

MY EXCEL TRAINER



CONTACT: DEVORAH MILLER

MYEXCELTRAINER@GMAIL.COM

443.310.7792

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THE SIMPLIFIER

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WHO ARE YOU:

MY EXCEL TRAINER is an Excel training program that uses a targeted, customized approach to individual and group training. Training is based on client's roles and responsibilities in their current job and how they use Excel. Essentially, we teach to the room - and don't waste time teaching people skills they don't need.

COMPANY MISSION:

I AM AN EXCELEVANGELIST. The highest goal is THE AHA MOMENT, getting clients to the point of real clarity and feeling good about their Excel skills.

BUSINESS GOALS:

- **SHORT TERM GOAL:** Attract the ideal clients, build a solid customer base of returning clients.
- **ULTIMATE GOAL:** Build a business that makes six figures, doing what I love to do and feel fulfilled.
- **PERSONAL LONG TERM GOALS:** Financial and schedule freedom to enjoy life with my family and friends. Bikinis and Mai Tais required.

PROJECT GOALS:

We aim to accomplish the following:

- Develop a brand that leverages your personality, image and authority to attract ideal clients.
- Develop a plan to carry your message across various platforms to attract ideal customers.
- Become memorable and share-able in the Excel training industry.

WE MEASURE SUCCESS IN:

FREEDOM, FULFILLMENT AND FUN!

CURRENT SUMMARY:

This company began out of a passion for teaching people how to better use Excel. Excel can be life changing - being able to use it correctly **SAVES TIME, SAVES MONEY** and sometimes changes how people do business.

My Excel Trainer uses a process to solve these client challenges. I am here to guide my clients through ALL of it by **CREATING A CUSTOMIZED, TARGETED TRAINING BASED ON THE INDIVIDUAL.**

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SIMPLIFIED FINDINGS & PROPOSED PLAN:

YOUR COMPANY IS RAD AND AWESOME.

YOU CAN REVOLUTIONIZE A BORING, KHAKI PANTS INDUSTRY WITH YOUR AUTHORITY, YOUR VIBE AND YOUR VOICE, AND FOLLOW THROUGH WITH YOUR SKILLS AS A TRAINER.

CHALLENGE 1: MARKETING.

Clarify your offerings - have a simple, three tier package and payment plan that is easily understood - and easy to sell. On top of that, we'll develop a maverick, RAD brand that puts you, the obvious expert, front and center as the guide and solution to your client's excel training challenges.

One of your challenges is that your clients don't know you exist and don't know what you have to offer. I would say that part of that challenge is that your offerings are not super super clear, and they are not speaking specifically to your target clients.

We'll develop the plan, the packages and detail your 2 step process in a way that makes you the obvious choice.

CHALLENGE 2: ADVERTISING

Now that we know what we're selling and who we are selling it to (See THE BRAND STUFF below), we can begin to pitch our message.

We'll build a website that outlines all your offerings and direct traffic using your super rad Excel Fairy persona on social media. You, the Excel Fairy, are here to magically turn teams of Excel dummies into Excel data geniuses. We will speak specifically to your clients challenge of **WASTED TIME AND MONEY** and use social media to drive traffic using that message.

Not sure where to start?

We'll be making plans! Details details, and most importantly, we will figure out what you can outsource.

CHALLENGE 3: COMPETITION

Emphasis on the tailored plan for individuals or groups. In person, with an expert teacher. **No wasted time** or generic lessons like the standard Excel training companies. Online resources may know everything, but they can't help you when you don't know what you don't know.

You, the Excel Trainer, are a real live person who can think and respond to questions.

YouTube can't win this round.

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CHALLENGE 4: REMOTE LEARNING

This is a technical challenge that we can easily overcome. We will test Zoom and comparable software to find the perfect fit.

CHALLENGE 4: SCOPE CREEP

Have a contract document drafted, signed by a point person - that includes plans, pricing, hours and terms so you can refer back to it to stay inside scope.

Doing this will help you to keep that 'evenings and weekends' crowd in line!

THE BRAND STUFF - SIMPLIFIED

1. BRAND MISSION:

WHAT WE WANT TO SAY:

Everybody can benefit from excel training. Whatever their job is, it will make them faster leaner meaner at their job. And benefit not only them but their company.

- We have developed a solution to a problem:

A CUSTOMIZED, TARGETED TRAINING BASED ON THE INDIVIDUAL. We focus on the individual because it's a proven method of higher yield learning.

- **GROUPS: THERE'S AN EXPERT METHOD** for assessing groups individually - together info and be able to keep tabs on individuals in a group setting.

AUTHORITY MESSAGING:

Your **EXPERTISE IS TEACHING EXCEL.** You are the authority on the method - how to hone in on what your clients need to know, how to teach it and make it 'stick'.

WHO WE WANT TO SAY IT TO: (TARGET AUDIENCE)

CORE CUSTOMERS ARE:

- Small to mid size business. Ideally you want to train many people individually or in a group setting in each company. The goal is to become the resident trainer in each company.

Therefore, we are targeting a specific person in a large company or corporation. Our perfect client has decision making authority.

(Some homework - we will need to research the job titles of this level of people - i.e, COO, CMO, Director of Sales, HR)

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2. PERSONAL IMAGE + VISUAL BRAND:

WE WANT TO STAND OUT - all the way out. Your social media personality is **THE EXCEL FAIRY** - @excelfairy. @myexcelfairy are already yours!

Female, in the tech world, purple hair, punk vibe.

When you talk about Excel you get super excited - we want you to embrace that persona and run with it.

WORDS THAT DESCRIBE OUR BUSINESS:

Disruptor. Maverick. COLOUR POP. DRIPPING SPRAY PAINT. BADASS VIBES.

Juxtaposition of PUNK with something SO GEEKY is perfect.

Something different. A new and different solution to an old problem .

Not the vibe: Stuffy boring, the 'box', BEIGE KHAKIS, Charlie Brown quacking adult and droning lectures.

SO... ARE YOU READY, BOSS?

RIGHT THIS
WAY 

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OK, WHAT'S NEXT?

THE WORKS (PLAN #3)

\$5,000

- \$250 already paid for Simplifier = \$4,750

50% deposit upon acceptance of estimate.

Remaining 50% due upon site launch.

Based on the brief (and any edits we make together) we will take your brand from GOOD TO RAD with a clear and distinct look and voice that will stand out from the any competition, build trust with your intended audience, and give you a clear message to share with your network. And most importantly, a brand and message so you get in front of the right people and know how to easily make the sale!

WE'LL EXECUTE THE FOLLOWING:

- Develop a targeted personal brand with message and copy that will both influence the messaging on your website, and how you describe and discuss your offerings.
- Design your personal brand that presents you as an expert in all things excel training, with magical powers to save time and money.
- Design visually branded identity materials so your brand is cohesive across platforms, including:
 - Logo
 - Website
 - Social Media iconography -variation for the My Excel Fairy social media applications
- Photography - book photoshoot to get those perfect shots that reflect your strong, branded vibe. Price TBD.
- Design, build and launch a 5 page website on Squarespace according to the sitemap that we will develop.
- Write all homepage and website copy, including main lines that get viewers to book a call with you.
- Framework for marketing content - develop curriculum of social media content and instruct you how to use it - we'll teach you to fish!
We'll outline the specific details of your social media marketing going forward - and work out any kinks in execution.
- Squarespace tutorial on how to updated and edit your site so you are never beholden to a webmaster again.

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CHECKLIST:

- 1. SIMPLIFIER QUESTIONNAIRE - ALREADY DONE!
- 2. LOGO DESIGN
- 3. SITE DESIGN
- 4. IDENTITY MATERIALS
- 5. SOCIAL MEDIA SETUP + TRAIN

AND SO IT
BEGINS.

