



CRM Software

# Business Plan


[YEAR]


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## A SAAS Business Plan


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# 1.

## EXECUTIVE SUMMARY

The Product

The Competition and Panda CRM' Competitive Edge

The Market Opportunity

The Sales and Distribution Strategy

Sales Growth and Revenue Projections

The Management Team

Funding Request and Use of Funds

The Exit Strategy

## The Product



**TIP**

Panda CRM is a revolutionary cloud-based customer relationship management (CRM) platform. Panda CRM's gamification system is unlike any other CRM currently available on the market. With 70% of failed CRM dying primarily because of a lack of user adoption, Gamification was designed to increase the level of adoption, interaction, and engagement with

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## The Competition and Panda CRM' Competitive Edge



TIP

CRMs are sold all over the internet, specifically by direct competitors of Panda CRM like Salesforce, Oracle, Dynamics CRM, and Sugar CRM. All of these CRM's offer similar tools as Panda CRM, yet none of them offer features such as Spider nor such great prices and package deals.

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## The Market Opportunity



TIP

Panda CRM's addressable market consists of small businesses – and the wage and salary sales workers of these businesses – that need a CRM system that organizes their customers' information easily and effectively while increasing sales volume and revenue. There are 27.9M small businesses in the U.S. and over 13M wage and salary sales workers i

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## The Sales and Distribution Strategy



TIP

Panda CRM will sell its CRM through 3 primary sales channels: online, sales representatives, and partnering reseller individuals and businesses. Panda CRM will drive traffic to the website via an aggressive online marketing campaign and will build market awareness via print ads and PR while eventually offering seminars, sponsorships, and TV

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## Sales Growth and Revenue Projections



TIP

In the first year, Panda CRM projects that it will sell 25,000+ 1-10 seat packages, 20,000+ 10-50 seat packages, and 16,000+ 50+ seat packages in year 1. By year 3, Panda CRM projects that it will attract 520,000+ 1-10 seat businesses, 420,000+ 10-50 seat businesses and 330,000+ 50+ seat businesses. By year 5, Panda CRM projects that it v

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## The Management Team



TIP

Panda CRM's founders are Bill Johnson (CEO) and John Bryant (CTO). Bill was the VP of marketing for Sugar CRM for 5 years. He helped the company grow to become a dominant player in the market before leaving to start Panda CRM. Bill is striving to create a vision and direction for the company and plans on doing so with the help of the rest of the executive

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## Funding Request and Use of Funds



TIP

Panda CRM is currently seeking seed funding of \$700,000. \$223,000 will be spent on startup and organizational expenses such as development, rent, and office equipment, consultants, etc. The remaining \$477,000 will be spent on sales, marketing, personnel, and operating expenses. The Company anticipates seeking an additional \$5,000,000 at the

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## The Exit Strategy



TIP

The most likely exit for Panda CRM will come from an acquisition by a major player or such as Salesforce, Oracle, and Dynamics CRM once the Company reaches 500,000+ company clients. A few recent mergers of CRM companies include Oracle acquiring Virtue for \$300M, Salesforce acquiring BuddyMedia for \$689M, Salesforce acquiring Radian6 for \$300M

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# 2.

## MISSION & VISION

MISSION STATEMENT

CORE PURPOSE

CORE VALUES

## MISSION STATEMENT



TIP

Panda CRM's mission is to help its clients improve CRM adoption rates, increase sales volume and frequency, gain customer loyalty and decrease customer service and sales costs by providing a user-friendly, innovative, and powerful CRM system.

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## CORE PURPOSE



TIP

Panda CRM's core purpose is to provide more efficiency and value in small business owner's relationships so that they can achieve their goals.

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## CORE VALUES

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# 3.

## PRODUCT & SERVICE DESCRIPTION

OVERVIEW OF PRODUCTS & SERVICES

PROBLEMS, CAUSES, SOLUTIONS & BENEFITS

## OVERVIEW OF PRODUCTS & SERVICES



TIP

Panda CRM is a revolutionary cloud-based customer relationship management tool. Like many CRM's currently on the market, Panda CRM helps businesses stay connected to their customers, clients, partners, and employees by providing the following features:

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## PROBLEMS, CAUSES, SOLUTIONS & BENEFITS



TIP

The current problems in the market and the main causes of these problems are presented below:

**Problems**

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TIP

The solutions that Panda CRM presents and the benefits associated with using Panda CRM are presented below:

**Solution: Panda CRM**

**Benefits**

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# 4.

## INDUSTRY ANALYSIS

INDUSTRY OVERVIEW

SAAS AND CRM INDUSTRY SIZE AND TRENDS

# INDUSTRY OVERVIEW



TIP

Panda CRM falls under the Cloud Computing Industry as a Software as a Service Provider (SaaS) as well as a CRM Provider. These industries are booming, and with new technological developments and growing relevance in global markets, these industries are ripe for Panda CRM's emergence.

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TIP

In the past decade, there have been numerous changes in the way business is conducted online. Previously, the software was an integral part of any business operation, as it was standard for numerous industries yes still customizable. Unfortunately, the software is a costly investment and often requires multiple updates, which can make it difficult and costly for co

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## Cloud Computing Industry

Start writing here...



TIP

While many cloud computing businesses offer time and money-saving processes and services, the Software as a Service (SaaS) sector, in particular, has been the fastest growing and most popular in the cloud. As a result, Panda CRM's entrance into the market is timely, well-positioning the Company to grow along with the industry.

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## SaaS Industry

Start writing here...



TIP

Customer Relationship Management (CRM) is a business strategy directed to understand, anticipate, and respond to the needs of an enterprise's current and potential customers in order to grow the relationship value. Initially emerging as a database marketing tool, CRMs have benefited from waves of technological growth and now provide advanced tools for monitoring

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## CRM Industry

Start writing here...

# SAAS AND CRM INDUSTRY SIZE AND TRENDS





TIP

CRM, SaaS and the cloud computing industry as a whole is a subsector of the Data Processing and Hosting Services Industry, which was projected to total \$81.3B in 2012 in the U.S.<sup>4</sup> Leading research company Gartner estimates that the U.S. SaaS market, in particular, grew by 18% in 2012 to \$14.5B and will continually expand to \$22.1B by 2015. Lastly, the C

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## Industry Size

*Start writing here...*



TIP

Although SaaS is the most popular cloud computing service, industry shifts in how cloud computing is utilized will be an up and coming trend for the next few years. The more robust of a service package offering the Company can provide, including services that extend beyond the traditional CRM realm, the more likely it will be to weather out changes and ev

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## Industry Trends and Key Factors

*Start writing here...*

# 5.

## COMPETITIVE ANALYSIS

COMPETITIVE OVERVIEW  
DIRECT COMPETITORS  
INDIRECT COMPETITORS  
COMPETITIVE ADVANTAGES  
MARKET SHARE ANALYSIS  
BARRIERS TO ENTRY

# COMPETITIVE OVERVIEW



TIP

The competitive field within the CRM industry is diverse with a multitude of systems-based solutions available to businesses.

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TIP

Panda CRM's most direct competitor is Zurmo, the only web-based, stand-alone CRM system that offers gamification features to encourage user participation. Other direct competitors, such as CRM Gamified and WaveAccess, are CRM add-ons that apply gamification features to existing CRM systems. Direct competitors include:

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## Direct Competitors:

Start writing here...



TIP

Panda CRM's indirect competitors consist of web-based CRM systems that offer a wide range of business management services that are not solely focused on traditional CRM applications. Indirect competitors include:

- MindBody Online

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## Indirect Competitors:

Start writing here...

# DIRECT COMPETITORS





	Panda CRM			
<b>Owner/CEO</b>	Bill Johnson, CEO	Jason Green	Subsidiary of UrulT Dynamix	Subsidiary of c360 Solutions
<b>Headquarters</b>	San Diego, CA	Cliffton Park, New York	Miami, Florida	Henderson, NV

<b>Year Founded</b>	2012	2012	2011	2000
<b>Website URL</b>	SolidSolutions.com	Zurmo.org	CRMGamified.com	Wave--Access.com
<b>Phone #</b>	555--555--5555	N/A	N/A	866--311--2467
<b>Type of Entity</b>	Private	Private	Subsidiary	Subsidiary
<b># of Employees</b>	5	25+	N/A	N/A
<b>Product Overview</b>	Web--based CRM that encourages user adoption, increased sales frequency and volume, increased customer retention and loyalty and decrease customer service and sales cost	Open sourced, web - based CRM that is mobile, social and gamified	Add--on to Microsoft's Dynamics CRM that applies gamification techniques to encourage CRM adoption by users by rewarding them for their actions and achieved goals	Add--on to Microsoft's Dynamics CRM that applies gamification techniques to encourage CRM adoption by users by rewarding them for their actions and achieved goals
<b>Key Features</b>	Spider gamification platform, contact management, activity management, deal tracking, security, personalize, social media integration, sales funnels, financial analytics, and reporting, email/phone integration, mobile application	Gamification platform, contact management, activity management, deal tracking, security, personalize, social media integration, sales funnels, financial analytics and reporting, email/phone integration, mobile application	Combines high professionalism with fun and healthy competition between users and teams, oriented to measure results, customizable actions and rewards, social integration	Assign points for customizable desired user actions which are tracked via a leader board
<b>Pricing</b>	\$15, \$30, \$40, and \$60/month depending on # of users	Free while in beta/testing	N/A	Free download

<b>Strengths</b>	Unique, customizable, applicable to multiple industries, easy to learn/use, effective	Unique, first gamified CRM to market, customizable, applicable to multiple industries	Customizable, applicable to multiple industries, sold on Microsoft Dynamics Marketplace (PinPoint)	Customizable, sold on Microsoft Dynamics Marketplace (PinPoint)
<b>Weaknesses</b>	New to the industry	New to the industry, still in beta/testing, no proof of concept	Tied to Microsoft Dynamics CRM and not a standalone CRM	Tied to Microsoft Dynamics CRM and not a standalone CRM, limited features

## INDIRECT COMPETITORS

The following table provides information on the businesses that the Company has identified as indirect competitors:

				
<b>Owner/CEO</b>	Rick Stollmeyer Founder and CEO	N/A	Carl Zaldivar, CEO	Pamela O'Hara, CEO
<b>Headquarters</b>	San Luis Obispo, California	Pleasanton, CA	Redondo Beach, CA	N/A
<b>Year Founded</b>	1998	2005	2001	N/A
<b>Website URL</b>	MindBodyOnline.com	Zoho.com	BizAutomation.com	TheSBWeb.com
<b>Phone #</b>	877.755.4279	888.900.9646	888--224--3227	N/A
<b>Type of Entity</b>	Private	Private	corporation	corporation
<b># of Employees</b>	N/A	1,500	N/A	N/A

<b>Product Overview</b>	A software company that offers different management solution options based on the industry	Offers a variety of online business, productivity, and collaboration applications	Run your entire business on one system	integration tools for small businesses
<b>Features</b>	Management software, mobile applications, merchant account processing, hardware, and IT solutions	Organizers, CRM, billing solutions, online database, document management, and more	CRM, marketing email campaigns, project management, online customer surveys	CRM, marketing email campaigns, project management, invoicing, SMS, website, accounting, appt scheduling
<b>Pricing</b>	Varies depending on service	\$12/month/user	Min 2 users: \$49/month/user Min 25 users: \$795/month/user	Varies based on service
<b>Strengths</b>	Various types of management solutions tailored to specific industries	Large pool of applications that businesses can take advantage of, relatively inexpensive	On--demand all--in--one super--suite, easy to direct webpage	Incorporates other companies well
<b>Weaknesses</b>	Only focused on Health and Wellness	Lack of differentiation	No invoicing, storefront, accounting	No actual company information available

Additional indirect competitors include Batchbook, Leopard CRM, Sugar CRM, Free CRM, and Tactical CRM.

## COMPETITIVE ADVANTAGES



**TIP**

Panda CRM's main competitive advantage compared to the numerous CRM alternatives available on the market lies within the Company's Spider gamification platform. This platform integrates with the Company's more traditional features (contact management, activity management, deal tracking, security, personalization, social media integration, s

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## Competitive Advantage



### Gamification

Spider gamification tools to increase user adoption



### Loyalty program

Loyalty program application to engage customers and referral partners



### Thirdparty integrations

Social media, email, phone and mobile app integration



### Customizations

Customizable actions, rewards, levels and bages makes the platform applicable to any industry



### State-of-the-art CRM

State-of-the-art CRM (contact and activity management, sales funnels, financial analytics, reporting, etc)

## MARKET SHARE ANALYSIS

The CRM industry is highly saturated and competitive, yet highly fragmented. Salesforce's market share was 16.7% in 2011, second only to SAP, and is expected to be the leading CRM vendor worldwide by 2013. SAP continues to be the worldwide leader in CRM software sales, with Salesforce ascending to second place. Oracle was displaced by Salesforce in 2011, a trend that is projected to accelerate through 2013. The market share (in millions of dollars) for the top 10 CRM software vendors from 2009--2011 is shown below:

2010 Rank	2011 Rank	CRM Vendors	2009	2010	2011	Share % 2010	Share % 2011	Growth 2010	Growth 2011
1	1	SAP	1,862.3	2,006	2,324	18.9	19.3	7.7	16.3
2	3	SalesForce	1,522.8	1,749	2,006	16.5	16.7	14.9	35.9
3	2	Oracle	1,166.5	1,476	1,918	13.9	16.0	26.6	9.7
4	4	Microsoft	690.8	793.3	901.0	7.5	7.5	14.8	13.6
5	5	Amdocs	389.8	408.5	434.1	3.9	3.6	4.8	6.3
6	6	Adobe	26.3	310.4	425.9	2.9	3.5	1,080.6	37.2
7	7	IBM	284.2	223.1	358.4	2.9	3.0	8.1	60.6
8	8	SAS Institute	43.3	223.1	344.8	2.1	2.9	414.9	12.2
9	9	Cegedim	222.6	218.7	232.3	2.1	1.9	--1.8	6.2

11	10	RightNow Technologies	115.4	147.4	187.4	1.7	1.6	14.6	27.1
		Other Vendors	2,958.5	3,026	2,883	27.7	24.0	2.3	--4.7
		Total CRM Market	9,285.6	10,583	12,016	100.0	100.0	14.2	13.5

The companies holding the majority of the market offer tools, add-ons, and other resources for users to customize their CRM software. While the industry is highly competitive, Panda CRM benefits from several competitive advantages, as outlined above, allowing the Company to differentiate itself from the current field and capture a decent percentage of the overall market.

## BARRIERS TO ENTRY

The following is an analysis of the barriers to entry that businesses within the software industry face:



TIP

The most significant barrier to entry is market saturation in both the CRM and ASP industries. Unless a new entrant to the market can significantly differentiate itself from its competitors, there are many applications that offer the same or similar features. Furthermore, the differentiating features must be proprietary or not easily replicated; otherwise, comp

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### Market Saturation

Start writing here...



TIP

Although not a strict barrier to entry, the beta and usability test period for software applications is critical. The functionality and stability of Panda CRM will be important to “get right” the first time given how quickly technology changes and how discerning CRM users are. It will be important to establish a reputation for a quality product starting from the beta

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### Beta and Usability Testing

Start writing here...



TIP

Patents and copyright infringement can be a large barrier for small or start-up businesses within the software industry. While there are ongoing debates over the need for software patents, large companies who own large shares of the market may threaten smaller businesses with patent litigation. In such cases, smaller businesses are generally forced to settle du

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### Patents & Copyrights



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# 6.

## MARKET ANALYSIS

Market Snapshot

ADDRESSABLE MARKET

B2B MARKET SEGMENTATION

IDEAL CUSTOMER PROFILE

## Market Snapshot



TIP

- There are 27.9M small businesses in the U.S.
- There are over 13M wage and salary sales workers in the U.S. as of 2010
- The largest four industries utilizing CRM software are Education, Manufacturing, Retail & Wholesale, and Utilities

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## ADDRESSABLE MARKET



TIP

Panda CRM's addressable market consists of small businesses— and the wage and salary sales workers of these businesses – that need a CRM system that organizes their customers' information easily and effectively while increasing sales volume and revenue.

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TIP

The Small Business Association (SBA) defines a small business as having fewer than 500 employees, though there is some slight variance in this definition depending on the industry. According to the SBA's most recent published data, there were 27.9M million businesses in the U.S. in 2010 and only 18.5K businesses with 500 employees or more.

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## Small Businesses – Market Size

Start writing here...

## Wage and Salary Sales Workers– Market Size

According to the U.S. Bureau of Labor of Statistics, there were over 13M wage and salary sales workers in the U.S. in 2010. The following table provides information about select U.S. sales occupations in 2010:

Occupation	Number of Employees	Average Wage
<b>Sales representatives (wholesale and manufacturing, except technical and scientific products)</b>	1,367,210	\$52,440
<b>Sales representatives (services, all other)</b>	531,410	\$50,620
<b>Sales representatives (wholesale and manufacturing, technical and scientific products)</b>	381,080	\$73,710

<b>Insurance sales agents</b>	318,800	\$46,770
<b>Securities, commodities, and financial services sales agents</b>	276,290	\$70,190
<b>Real estate sales agents</b>	153,740	\$40,030
<b>Advertising sales agents</b>	145,160	\$45,350
<b>Sales engineers</b>	66,060	\$87,390
<b>Real estate brokers</b>	41,210	\$54,910

While there are numerous occupations within the sales industry, most occupations fall into the education, manufacturing, retail & wholesale, or utility categories. Manufacturing and retail sales occupations have the highest number of employees, with 1.3M spread across the nation. Service sales representatives generally fall under the utility or education category, as such sales representatives generally sell consulting services, telecommunication services, or other service-based solutions such as insurance or financial advice.

## B2B MARKET SEGMENTATION

Panda CRM will specifically target the education, manufacturing, retail & wholesale, and utility industries as these are the largest markets that utilize CRM systems. The following table provides information on these industries:

	<b>Education Industry</b>	<b>Manufacturing Industry</b>	<b>Retail &amp; Wholesale Distribution Industry</b>	<b>Utilities</b>
--	---------------------------	-------------------------------	-----------------------------------------------------	------------------

	Education Industry	Manufacturing Industry	Retail & Wholesale Distribution Industry	Utilities
<b>Industry Need for CRM</b>	Allow institutions to build stronger relationships with students and other constituents. Institutions are targeting admissions and enrollment, student services and financial aid as the areas driving CRM investment.	Provides the basis to respond to a new customer-centric, and customer-driven business model and integrate multiple partner channels for a holistic customer view.	Provide complex pricing and promotions, sophisticated discounting permutations, Radio Frequency Identification (RFID) and bar code scanning, real-time integration with Point of Sales (POS), terminals, and extended integration with Supply Chain Management (SCM) systems.	Provides increased workflow automation, electronic bill presentment and payment (EBPP), self-service, mobile field service, and CRM analytics in order to respond to external pressures.
<b>Types of CRM Utilized</b>	Oracle's PeopleSoft, SunGard, SAP, Oracle, Talisma, Onyx and RightNow	Siebel Systems, SAP, Oracle, Avaya, Dendrite, Genesys, SSA, QAD, Fair Issac, Pivotal, Infor, and Microsoft.	Reynolds and Reynolds, SAP, Avaya, Lawson, Fair Issac, Oracle, Genesys, Omniture, and Siebel Systems.	Siebel Systems, SAP Aspect Software, SPL WorldGroup, Avaya, Genesys, and Oracle
<b>Company Examples</b>	Colleges and Universities in both North America and Europe.	Kawasaki Motors, Brandrud Furniture and Milacron.	IBM, Alta Resources, Three Rivers Pharmaceuticals, BlueCross BlueShield and American Airlines.	America Online, Gaz Metropolitan Plus, and AGL Resources.

## IDEAL CUSTOMER PROFILE



**TIP**



The Ideal Customer for Panda CRM is a small business owner with a company of 1--100 employees or an employee within such a company that makes purchasing c

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# 7.

## SALES & MARKETING PLAN

SALES & MARKETING GOALS

SWOT Analysis

PRICING STRATEGY

BRANDING

MARKETING STRATEGIES

## SALES & MARKETING GOALS



**TIP**

Panda CRM will sell its CRM through 3 primary sales channels: online, sales representatives, and partnering re-seller individuals and businesses.

Panda CRM' total sales goals for online traffic, sales representatives, and re-sellers are provided in the table below:

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**TIP**

The charts below provide Panda CRM's marketing goals for online sales based on the following assumptions:

- About 1% of all website visitors will convert to paid accounts immediately
- About 20% of visitors will be inclined to try the

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### Online Traffic

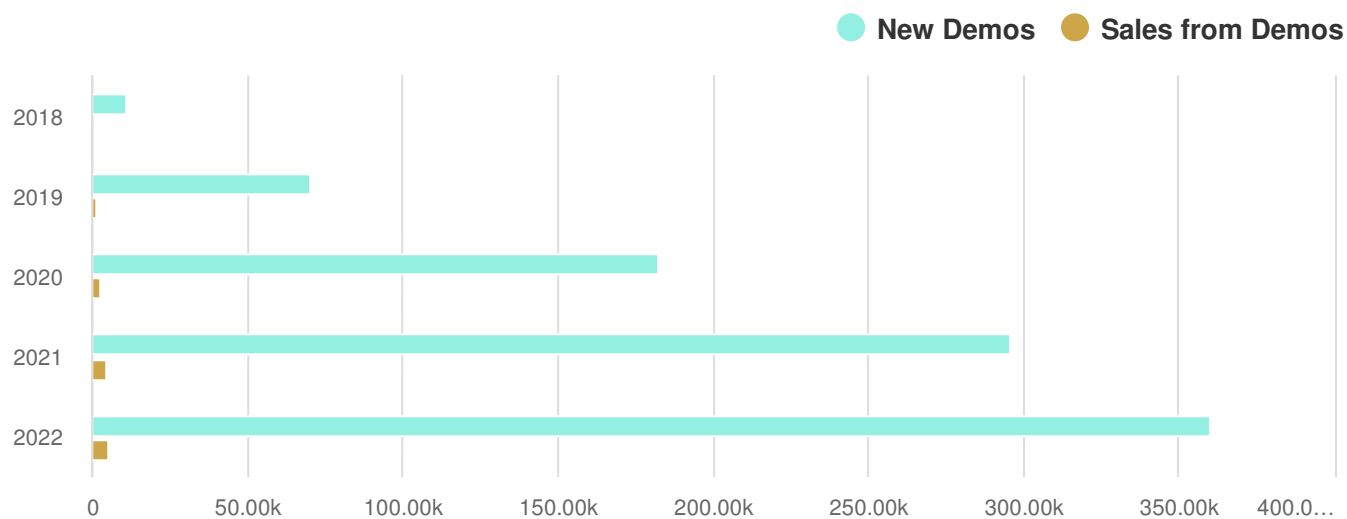
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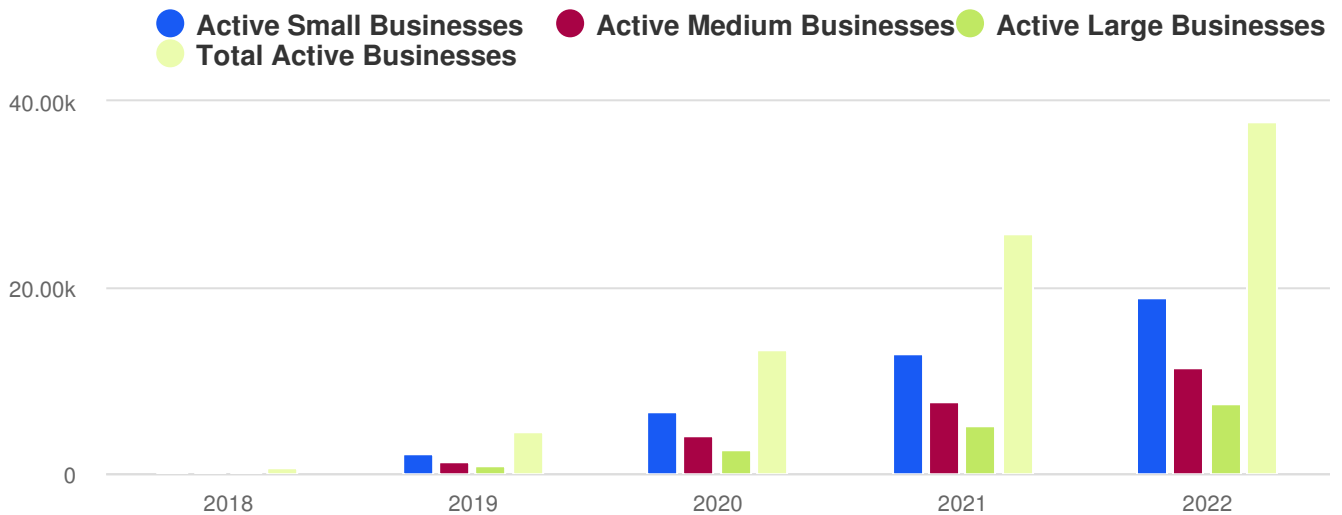


## New Demos (Units) - Online



Financial Year	New Demos	Sales from Demos
2018	10737	161
2019	70079	1051
2020	182242	2734
2021	295567	4434
2022	360030	5400

## Active Businesses (Units) - Online Traffic



Financial Year	Active Small Bus...	Active Medium B...	Active Large Bus...	Total Active Busi...
2018	321	192	128	641
2019	2231	1339	892	4462
2020	6691	4015	2676	13382
2021	12886	7731	5154	25772
2022	18928	11357	7571	37855



**TIP**

The chart below provides Panda CRM's sales and marketing goals for sales representatives based on the following assumptions:

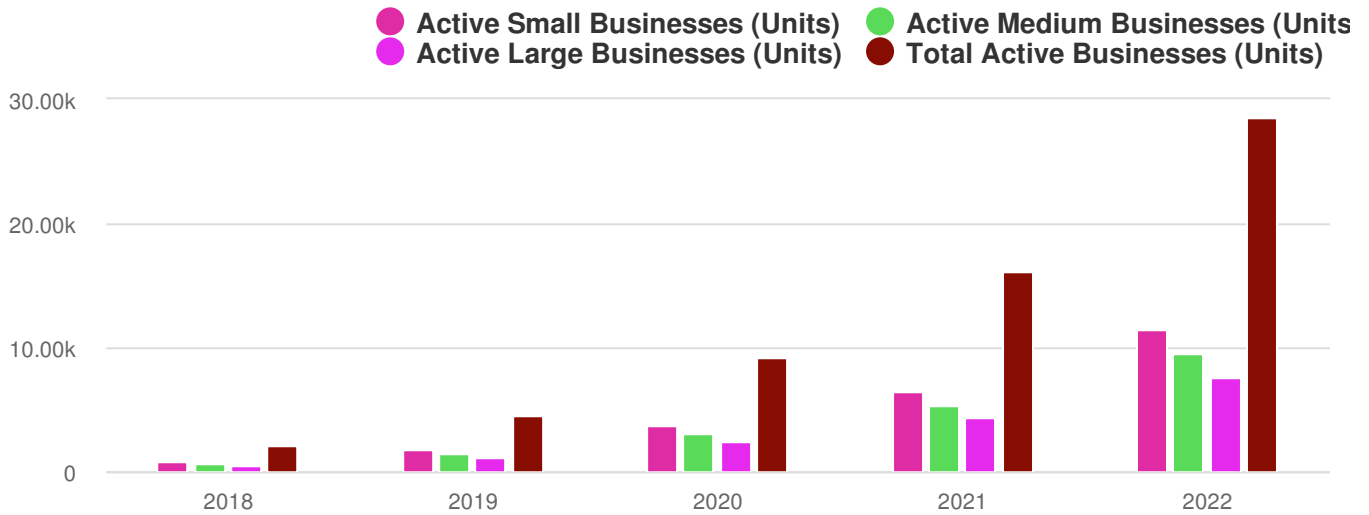
- Sales representatives close thirty 1--10 seat businesses, twenty-five 10--50 seat businesses, and twenty 50+ seat

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## Sales Representatives

*Start writing here...*

## Active Businesses - Sales Representative



Financial Year	Active Small Bus...	Active Medium B...	Active Large Bus...	Total Active Busi...
2018	817	681	545	2043
2019	1781	1484	1187	4453
2020	3678	3065	2452	9194
2021	6458	5381	4305	16144
2022	11394	9495	7596	28485



**TIP**

The chart below provides Panda CRM's sales and marketing goals for resellers sales based on the following assumptions:

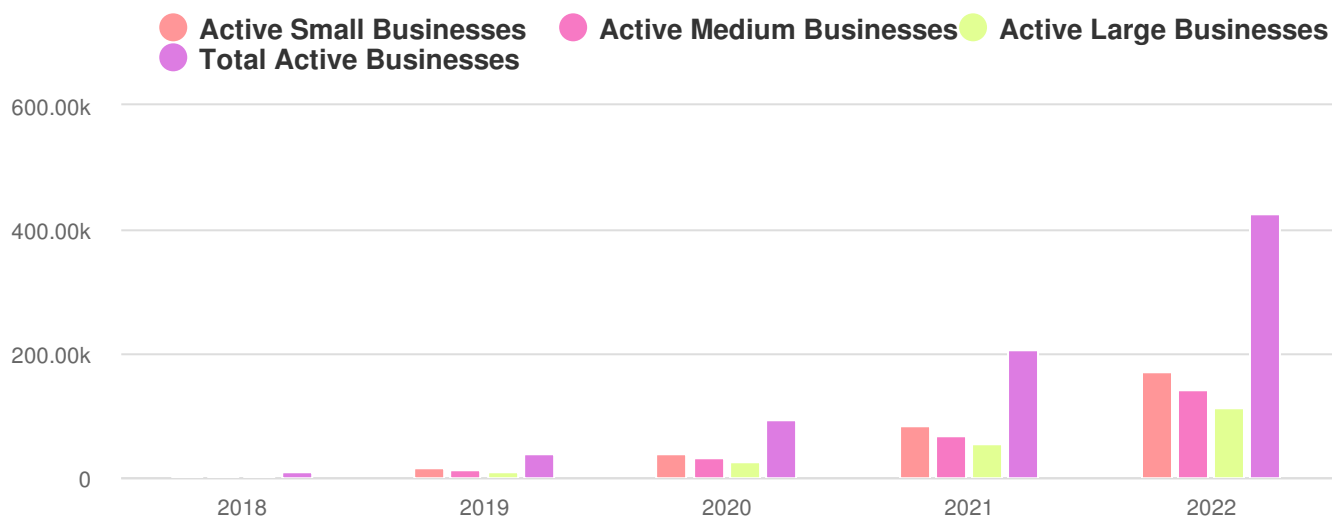
- Sales representatives close 2 new resellers per month
- Resellers close thirty 1-10 seat businesses, tw

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## Resellers

Start writing here...

## Active Businesses (Units) - Re sellers



Financial Year	Active Small Bus...	Active Medium B...	Active Large Bus...	Total Active Busi...
2018	4101	3417	2734	10251
2019	15440	12867	10294	38601
2020	37668	31390	25112	94170
2021	82721	68934	55147	206802
2022	170410	142008	113606	426024

## SWOT Analysis

The following chart provides information on the Company's strengths, weaknesses, opportunities, and threats for entering the market.

## Strengths

- Easy to use
- Competitive price
- Free trial and effective up-sell strategy
- Diligent customer service
- Connection generator
- Tarantula gamification platform
- Effective as a loyalty program
- Experienced management team

S

## Weaknesses

- Large, fragmented market with numerous competitors
- Capital restraints
- New to industry, little to no market recognition at the time of launch

W

## Opportunities

- Large market size
- Internet lends to global market
- Numerous marketing channels
- Staying on top of software revolution

O

## Threats

- Continuous software revolution
- Low barriers to entry for competition
- Economic Recession
- Wide market variety

T

## PRICING STRATEGY



TIP

Panda CRM will offer a free, demo version of the CRM via the Company's website for a limited trial basis in order to attract potential paying customers. Panda CRM will charge small businesses that require up to 10 logins \$20 per month. Businesses that require 10 to 50 seats will be charged \$30 per month. Businesses with 50+ seats will be charged \$40 per month.

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## BRANDING



TIP

In order to enforce a brand identity, Panda CRM wants customers to associate effectiveness, organization, relationships, reliability, professionalism, and success with its name. Panda CRM wants them to think of easy to use the system, strong connections, a friendly environment, and a productive workforce. The way to get customers to think about Panda CRM in these terms

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## Branding Strategy

Start writing here...

Company Overview	
<b>Words Customers Should Associate with the Company</b>	Effectiveness, Organization, Relationships, Reliability, Professionalism, Success
<b>Related Words</b>	Easy to Use, Strong Connections, Friendly Environment, Productive Workforce
<b>Mission Statement</b>	Panda CRM gives small businesses the ability to enhance their customer relationships by providing a user-friendly, innovative, and powerful CRM system that is efficient and has unparalleled customer service.
<b>Core Values</b>	Quality, Efficiency, Expertise, Customer Service
<b>Services Offered</b>	Panda CRM System
<b>Specialty</b>	An efficient and easy to use the system that will save users time in managing relationships.
<b>Target Market</b>	Business Consultants, Retailers, Advertising Agencies, Software Publishers, Accountants, and other Small Business Owners
<b>Terms Used that Show the Connection Between the Company and the Target Market</b>	Making Lives Easier, Saving Small Business Owners from Headaches
<b>What Sets the Company Apart from the Competition</b>	Panda CRM cares about the fact that small business owners are strapped for time and offers a simplistic CRM system that makes their lives less hectic.

Panda CRM Brand	
<b>Business Name</b>	Panda CRM

## Panda CRM Brand

<b>Unique Selling Position</b>	Panda CRM gives customers freedom in their lives by offering them a solution to time-consuming relationship management software. Also, the Spider connection generator is unlike any technology in existence.
<b>Tagline</b>	“Relationships Made Easy”

## MARKETING STRATEGIES



**TIP**

- Online Marketing
  - Website
  - SEO
  - PPC (Google and Social Media Ads)

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**TIP**

Panda CRM's online marketing strategies consist of a well--optimized website, search engine marketing tactics, paid ads, social media, e--newsletters, blog marketing, and viral video clips.

A well--optimized website with proper site structure,

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### Online Marketing

*Start writing here...*

# 8.

## OPERATIONS PLAN

LOCATION

STAFFING AND TRAINING

PERSONNEL PLAN

CUSTOMER SERVICE

PURCHASING PROCEDURES

QUALITY CONTROL MEASURES



## LOCATION



TIP

The headquarters is under leasing contract located at the following address:

123 Smith Street, Suite 1  
San Diego, CA 92110  
United States

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*Start Writing here...*

## STAFFING AND TRAINING



TIP

Staff will be hired according to recommendations, experience, and education in their field. A high standard will be kept through the training manuals for new employees and will be given a mentor to shadow for the first 2 weeks of arriving. Later a checklist will be drafted to monitor their quality of service first three months.

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## PERSONNEL PLAN

The following table outlines Panda CRM 5 year hiring plan including starting salaries and hiring dates:

Position	Starting Salary	Hiring Date
CEO	\$80,000	Month 1
CFO	\$75,000	Month 1
CTO	\$75,000	Month 1
CMO	\$60,000	Month 1
Lead Front End Engineer	\$60,000	Month 1
Lead Back End Engineer	\$60,000	Month 1
Lead UI/US Engineer	\$60,000	Month 1
Sales Representatives	\$30,000	Month 1
Customer Service Representatives	\$30,000	Month 1
Sales Manager	\$50,000	Month 1

Position	Starting Salary	Hiring Date
Marketing Manager	\$50,000	Month 1
Front End Engineer Support Staff	\$80,000	Month 13
Back End Engineer Support Staff	\$80,000	Month 13
UI/US Engineer Support Staff	\$80,000	Month 13
Sales & Market Assistants	\$50,000	Month 13
Controller	\$50,000	Month 13
Bookkeeper	\$30,000	Month 13
Administrative Assistants	\$35,000	Month 13

## CUSTOMER SERVICE



TIP

Customer services provided by Panda CRM will be done through the company's webpage as a SaaS as well as through designated customer service agents. Panda CRM's unique competitive advantage of having software that learns what the user is looking for in reports and other tools, and over time create these reports automatically will help

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## PURCHASING PROCEDURES



TIP

All of Panda CRM purchases are done over the phone or placed online through an online shopping cart system that will be added to the company's website. Credit cards will be charged 1-3 business days after the initial purchase, barring any unforeseen complications, and will continue to charge the customer's credit card monthly. Unsatisfied customers

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## QUALITY CONTROL MEASURES



**TIP**

Panda CRM will continuously review its manuals and software to ensure only the highest quality of service and products. Software functionality will be tested continuously by engineers to ensure safety from hackers and viruses. Any complaints or observations about the program will be noted and promptly fixed. A record of all complaints will be kept in order to pre

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# 9.

## MANAGEMENT TEAM

KEY MANAGEMENT

BOARD OF DIRECTORS & BOARD OF ADVISORS

## KEY MANAGEMENT



---

### BILL JOHNSON

*Founder and CEO - [bill.j@example.com](mailto:bill.j@example.com)*

Bill Johnson was the VP of Marketing for Sugar CRM for 5 years, helping the company grow to become a dominant player in the market before leaving to start Panda CRM. Bill's major responsibility in the company is to create the vision and direction for the company and work with the rest of the executive team to plan how this will be accomplished.



---

### JENNIFER THOMAS

*CMO - [jenif@example.com](mailto:jenif@example.com)*

After 8 years of experience as a Marketing Executive at eBay, Jennifer joined the Panda CRM team in 2009 as the Chief Marketing Officer. Her major responsibilities include creating an innovative marketing strategy to meet the company's overall goals for sales and revenue.

She is also responsible for overseeing the execution of the marketing strategy by the sales and marketing teams.



---

### MICHAEL RUSSMAN

*CFO - [mich@example.com](mailto:mich@example.com)*

Michael Russman has over 15 years of experience as a CFO for a variety of growing technology companies. At Panda CRM, his major responsibilities include allocating the company's resources effectively to effectively execute the company vision, with respect to the company's goals for consistent growth.



---

### JOHN BRYANT

*Founder and CTO - [john@example.com](mailto:john@example.com)*

John brings wide-ranging technical expertise and experience to the Panda CRM team. From 2003--2006, John was the Lead User Interface Engineer for the CRM division at Biz Automation. John also has significant experience in heading teams specialized in both front--end and back--end engineering. At Panda CRM, John's major responsibilities as CTO include overseeing product development by the engineering team, as well as managing ongoing system improvements and repairs.

## BOARD OF DIRECTORS & BOARD OF ADVISORS

The Company is currently building its Board of Directors and Board of Advisers.

# 10.

## FINANCIAL PLAN

FINANCIAL SUMMARY

MARKETING AND PERSONNEL EXPENSES

PROJECTED PROFIT AND LOSS

PROJECTED CASH FLOW

PROJECTED BALANCE SHEET

CURRENT OWNERSHIP SUMMARY

FUNDING REQUEST & TERMS OF INVESTMENT

EXIT STRATEGY

# FINANCIAL SUMMARY

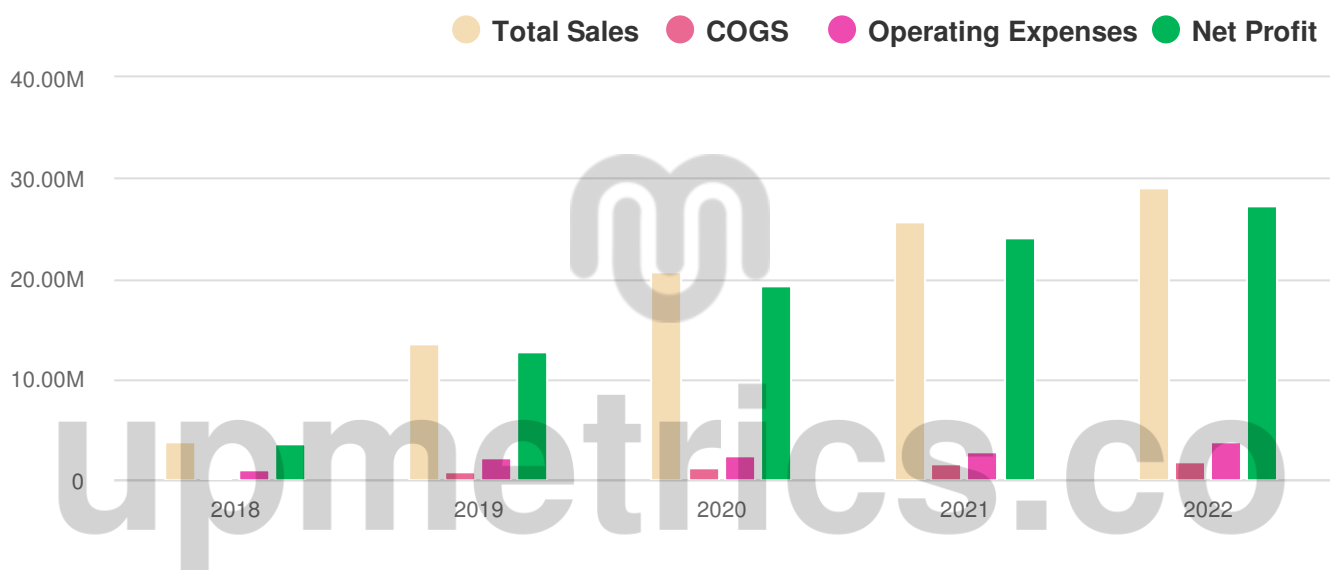


The Company intends to deploy its funding to maximize growth and profitability. The following chart outlines Panda CRM's projected net profit, gross revenue, and profit margins for the next five years:

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Start Writing here...

## Profit and Loss



Financial Year	Total Sales	COGS	Operating Expen...	Net Profit
2018	3782360	255742	1085858	3526619
2019	13604539	854672	2196632	12749867
2020	20674652	1278879	2430785	19395772
2021	25625964	1575958	2716466	24050007
2022	29097311	1784239	3859195	27313072



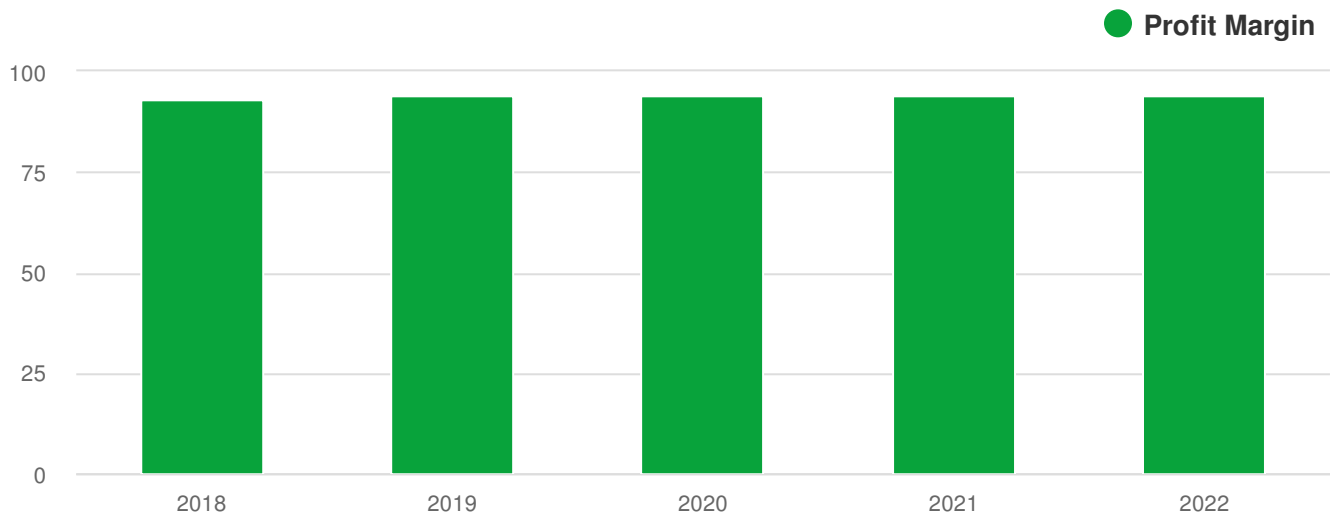
Panda CRM projects modest revenue in the first two years of operations followed by high growth in 2016 through 2018 as the Company dials in its operations and turns up sales and marketing efforts and budget. Panda CRM's revenue is divided into 3 main categories – Online Sales, Sales Representative Sales, and Reseller Sales – as outlined in the chart

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## Profit Margin

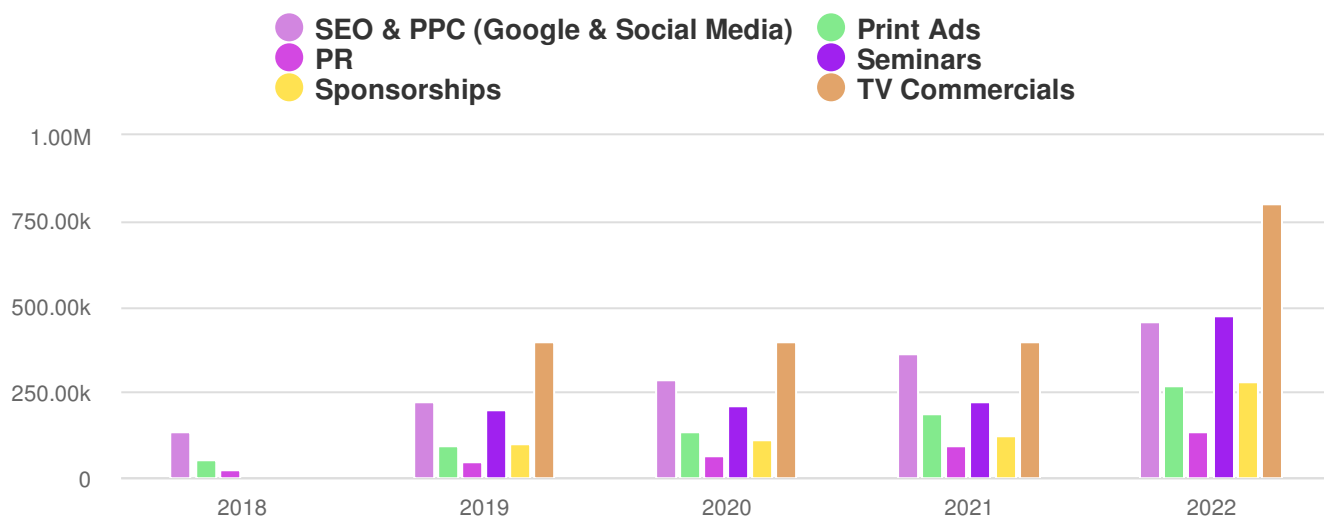


Financial Year	Profit Margin
2018	93
2019	94
2020	94
2021	94
2022	94

## MARKETING AND PERSONNEL EXPENSES

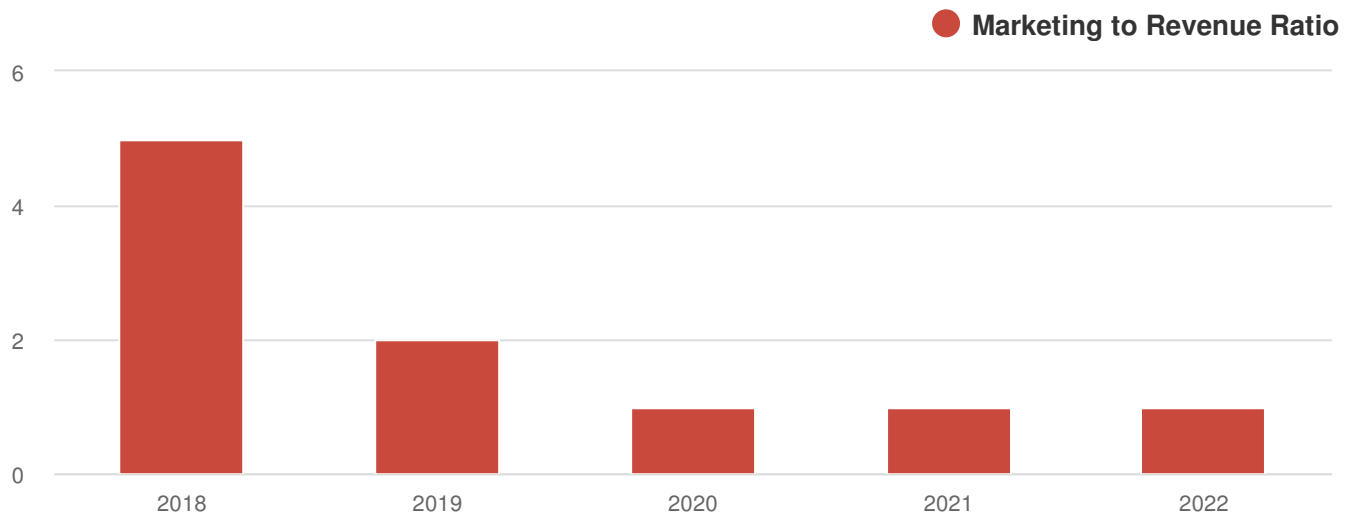
Based on the marketing strategies described in the sales and marketing section of this plan, the Panda CRM' marketing budget is as follows:

## Marketing Budget



Financial Y...	SEO & PPC...	Print Ads	PR	Seminars	Sponsorshi...	TV Commer
<b>2018</b>	136565	50796	25398	0	0	0
<b>2019</b>	224402	92587	46293	200000	100000	400000
<b>2020</b>	284596	132007	66003	210000	110000	400000
<b>2021</b>	360936	188210	94105	220500	121000	400000
<b>2022</b>	457754	268343	134171	474626	279510	800000

## Marketing to Revenue Ratio



Financial Year	Marketing to Revenue Ratio
2018	5
2019	2
2020	1
2021	1
2022	1

## PROJECTED PROFIT AND LOSS

The following chart depicts Panda CRM' annual Profit & Loss Statement:

### Projected Revenue Data

Here you can embed your projected revenue data from financial forecasting.

## PROJECTED CASH FLOW

Thee follow chart depicts the Company's projected cash flow statement for the first 5 years of operations:

### Projected Expense Data

Here you can embed your projected expenses data from financial forecasting.

## PROJECTED BALANCE SHEET

Following chart depicts the Company's projected balance sheet for the first 5 years of operations:

### Projected Revenue Data

Here you can embed your projected revenue data from financial forecasting.

## CURRENT OWNERSHIP SUMMARY

Panda CRM is currently owned by the founders Bill Johnson and John Bryant. Bill Johnson owns 60% of the company while John Bryant owns 40% of the company.

## FUNDING REQUEST & TERMS OF INVESTMENT



TIP

To date, Panda CRM has reached the following milestones:

- Incorporated the Company
- Built the management team
- Acquired technology patents securing the Cor

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### Current Milestones

*Start writing here...*



TIP

Panda CRM is currently seeking seed funding of \$750,000. \$223,000 will be spent on startup and organizational expenses such as development, rent, and office equipment, consultants, etc. The remaining \$527,000 will be spent on sales, marketing, personnel, and operating expenses. The seed capital will be used over the first year of operations to reach the fo

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### Seed Capital

*Start writing here...*



The Company anticipates seeking an additional \$5,000,000 at the beginning of year 2 in order to finance capital expenditures in years 2 and 3 – such as technological infrastructure, key personnel, and marketing campaigns – that will be necessary to support the Company’s growth.

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## Series A Capital

*Start writing here...*

### Projected Funding Data

Here you can embed your projected funding data from financial forecasting.

## EXIT STRATEGY



The tech industry is experiencing a consolidation phase with 2012 seeing 2,277 private tech companies acquired for \$46.8B. The E-Marketing & Search segment increased fourfold compared to the first half of 2011 and 30 percent relative to the prior half-year period. 76% of the acquired companies hadn't raised VC money prior. The CRM industry saw num

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*Start Writing here...*

# 11.

## APPENDICES

PRODUCT COMPARISON

## PRODUCT COMPARISON

	<i>Free Membership</i>	<i>Premium</i>	<i>Premium Pro</i>	<i>Enterprise</i>
<b>Features</b>	<b>100 Contacts</b>	<b>1000 Contacts</b>	<b>25,000 Contacts</b>	<b>Unlimited</b>
	<b>1,000 Emails</b>	<b>1 GB</b>	<b>3 GB</b>	<b>10 GB</b>
	<b>2 Users</b>	<b>2 Users</b>	<b>3 Users</b>	<b>4+ Users</b>
Communications/Networking	x	x	x	x
Send emails to team members	x	x	x	x
Private member messaging/email	x	x	x	x
Attach a file to email messages	x	x	x	x
Attach an event to email messages	x	x	x	x
Media/File Sharing	x	x	x	x
Maximum limit	x	x	x	x
Purchase additional storage	x	x	x	x
Business Management Features	x	x	x	x
CRM	x	x	x	x
Marketing Automation	x	x	x	x
Productivity Tool	x	x	x	x
Partner Relationship Management PRM	x	x	x	x
Business Relationship Manager BRM	x	x	x	x
Contract & Documents Management	x	x	x	x
Appointment Scheduling	x	x	x	x
Assign tasks to members	x	x	x	x
Milestone/percentage tracking	x	x	x	x

Sales/fundraising reports	<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>
Email tracking	<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>
Biz Mgt & Marketing Features	<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>
Events/Calendar	<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>
Recurring events	<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>
Automatic event reminders	<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>
- Email	<b>x</b>		<b>x</b>	<b>x</b>
- SMS	<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>
- Auto notify subs to fill the lineup	<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>
RSVP capability (member log-in)	<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>
- via Email	<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>
- via SMS	<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>
Project deadlines integrated	<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>
Custom event types	<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>
Social media		<b>x</b>	<b>x</b>	<b>x</b>
- Twitter		<b>x</b>	<b>x</b>	<b>x</b>
- Facebook		<b>x</b>	<b>x</b>	<b>x</b>
- LinkedIn		<b>x</b>	<b>x</b>	<b>x</b>
- Searchable	<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>
FAQ	<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>
Video tutorial	<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>
Support forums	<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>
Telephone support		<b>x</b>	<b>x</b>	<b>x</b>



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