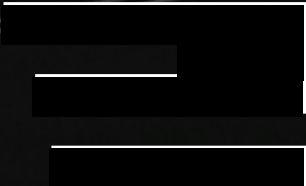
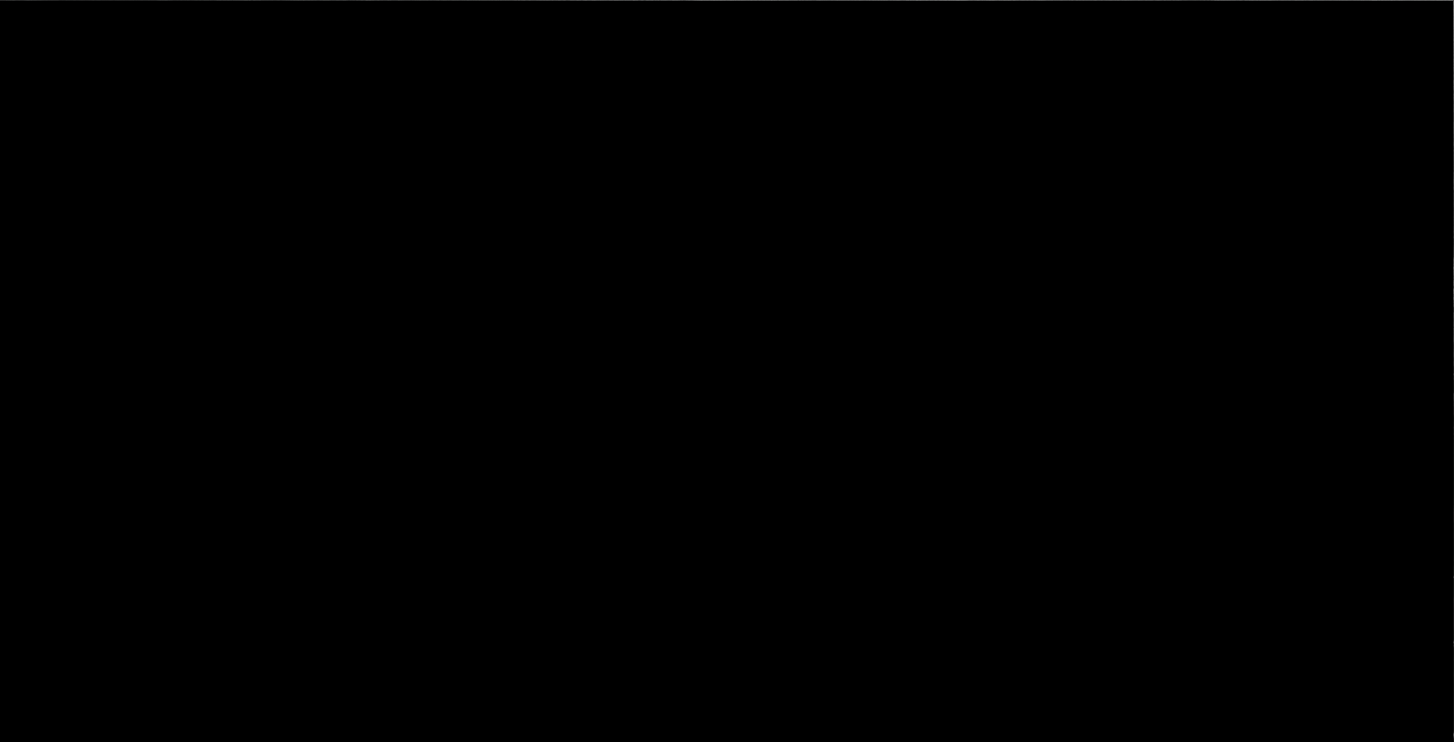


Go-to-Market Research Initiative

Online Community Findings and Insights



RESEARCH OBJECTIVE

Gather the insights that will inform the development of (a) a go-to-market launch plan, (b) the buyer experience that will drive [REDACTED] adoption and (c) a game plan for alignment of [REDACTED] marketing and sales teams around the right buyer experience.

Day 1 Exercise: “Getting to Know You”

INFORMAL POLL: “On a scale of 0 (None at All) to 10 (The Most Possible), rate how much pressure you feel to build financial security for your family.” (22 completes)

QUESTIONNAIRE: Exploring why community members started a [REDACTED] company, goals and aspirations for the future, financial values, etc. (41 completes)

ACTIVITY: “Share a photo that represents why you started a [REDACTED] company (or went into [REDACTED]).” (27 completes)

Day 2 Exercise: “Finding [REDACTED]”

QUESTIONNAIRE: Exploring percentage of [REDACTED], [REDACTED] and what it’s like to rely on [REDACTED] for [REDACTED] distinctions between good [REDACTED] and bad [REDACTED]. (34 completes)

ACTIVITY: “Post a story in the forum about your best and worst experiences with a [REDACTED]” (24 completes)

Day 3 Exercise: “Serving Freight”

INFORMAL POLL: “If you had to compare [REDACTED] companies with [REDACTED] in general, who do you think would be a more trustworthy source of [REDACTED]” (15 completes)

QUESTIONNAIRE: Exploring the technologies [REDACTED] that community members use to run their businesses, apps that community members would create if they could, attitudes towards day-to-day routines and productivity and amount of time available in a given month to think about the big picture. (31 completes)

ACTIVITY: “Upload five screenshots of the interface [REDACTED] and tell us what you like and dislike.” (22 completes)

Day 4 Exercise: “Here’s an Idea We Have”

Used an 80-second concept explainer video as stimulus (did NOT identify [REDACTED])

QUESTIONNAIRE: Exploring the impressions and questions that arise when exposed to [REDACTED] concept explainer video (in order to score concept “Acceptors” and “Rejectors”) then asked a series of deeper questions regarding concept specifics, benefits and concerns. (26 completes)

ACTIVITY: “Head over to the forum and discuss these five questions...” (22 completes)

- This service requires using a [REDACTED] free of charge. How easy is it to switch out an [REDACTED] Hassle? Not a big deal?
- What are the early cues you’d look for to determine this concept is working?
- If this service provided [REDACTED] [REDACTED] that make a difference?
- How do you see this concept changing your life as an [REDACTED]?
- How would you explain this idea to your peers?

**DISCUSSION
FLOW**

ANSWERS TO KEY QUESTIONS

1. With what business goals and lifestyle values will the offering resonate in owners of

Of all of the possible motivations that inspire to start their own companies, three in particular stand out: the desire for (a) freedom, (b) control and (c) financial gain.

To get why those factors are so important, you have to see how their experiences and careers have imbued them with a approach to entrepreneurialism. Think of the few aspirational progressions can make through the course of their career. Whether you've been for one year or 20, starting your own company feels like a promotion – like “the end of the beginning,” so to speak.

These owners started their own company because they saw an opportunity to do things their own way – a way that each believes is better because their own individual approach to is informed by wisdom and experience. As such, they want full accountability. They want full ownership of They want to fully benefit.

Moreover, they also want control. The trouble is... control is so hard to come by in this industry. The same can also be said for fairness. Take a deep enough look at the community members' responses to the questionnaires and you'll see an eagerness to inject fairness into That's part of doing things the way they should be done – in a way that treats employees and customers with fairness and respect.

There are certain family values at play, as well. Many of these started their businesses with their spouses. Again, part of the desire for freedom and control is the potential of spending more time (and earning more money) with family. If there's one thing we can all relate to, it's the yearning to secure better lives for our families.

The community members' financial values are also worth considering. A common value shared across the responses: being smart about living within their limitations. take pride in doing the best they can with the constraints they face – in being disciplined instead of wasteful. Those financial values color the aspirations owners have for the future. They don't cling to wild hopes and bold dreams – just realistic, attainable ambitions.

That orientation towards the future is also reflected in the way these owners want to grow – slowly, steadily and methodically.

2. In what specific ways will the [REDACTED] offering address the day-to-day challenges and frustrations of [REDACTED]

This is a big question with a very involved answer. The most concise way to put it is this...

We all get that [REDACTED] can meet immediate, practical needs for [REDACTED] companies. However, some non-trivial emotional benefits can also be derived from the offering, as well.

[REDACTED] is an extremely stressful job. You can see that in the results from the informal poll conducted on Day 1. Out of 22 respondents, 50% rated the pressure they feel to build financial security for their families at a “10” (on a scale of 0 to 10). Another 36% of respondents rated the pressure they feel between “7” and “9.”

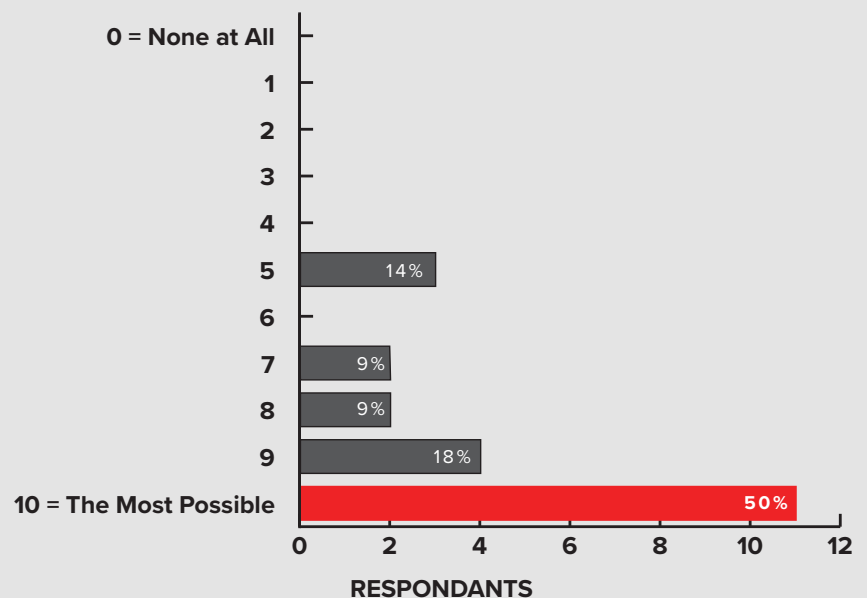
That pressure is absolutely manifested in the stress that community members feel in their day-to-day jobs. While a handful of community members pointed to [REDACTED] as a source of stress, far and away the most-anxiety ridden facet of owning [REDACTED] is [REDACTED]. As one of the community members said in the Day 1 Questionnaire: [REDACTED]

Moreover, all of these folks are very close to the [REDACTED]. Consequently, the usual [REDACTED] pain points carry an emotional, visceral burden.

(Concomitantly, the Day 2 Questionnaire revealed that, on the margin, today’s revenue and [REDACTED] don’t feel “safe” to the community members.)

In a similar vein, the Day 3 Questionnaire addressed the challenges community members encounter in operating their businesses. By and large, the community members do feel like they have a good deal of control over their day-to-day routines. But, it’s hard to recover when something goes awry. Irregularities can blow up your entire day. Moreover, it’s hard to think about big picture challenges and plan for the future because they just don’t have much time to sit down and “think.”

“On a scale of 0 to 10, rate how much pressure you feel to build financial security for your family:”



3. What distinctions in operational processes (and technologies) exist between [REDACTED]

The participant sample didn't yield enough dispersion in [REDACTED] to dig in to specifics with confidence here (most of the community members represented [REDACTED]). However, we've learned enough to formulate a few rules of thumb until [REDACTED] range can be studied further. With the aforementioned in mind, here are two quick observations:

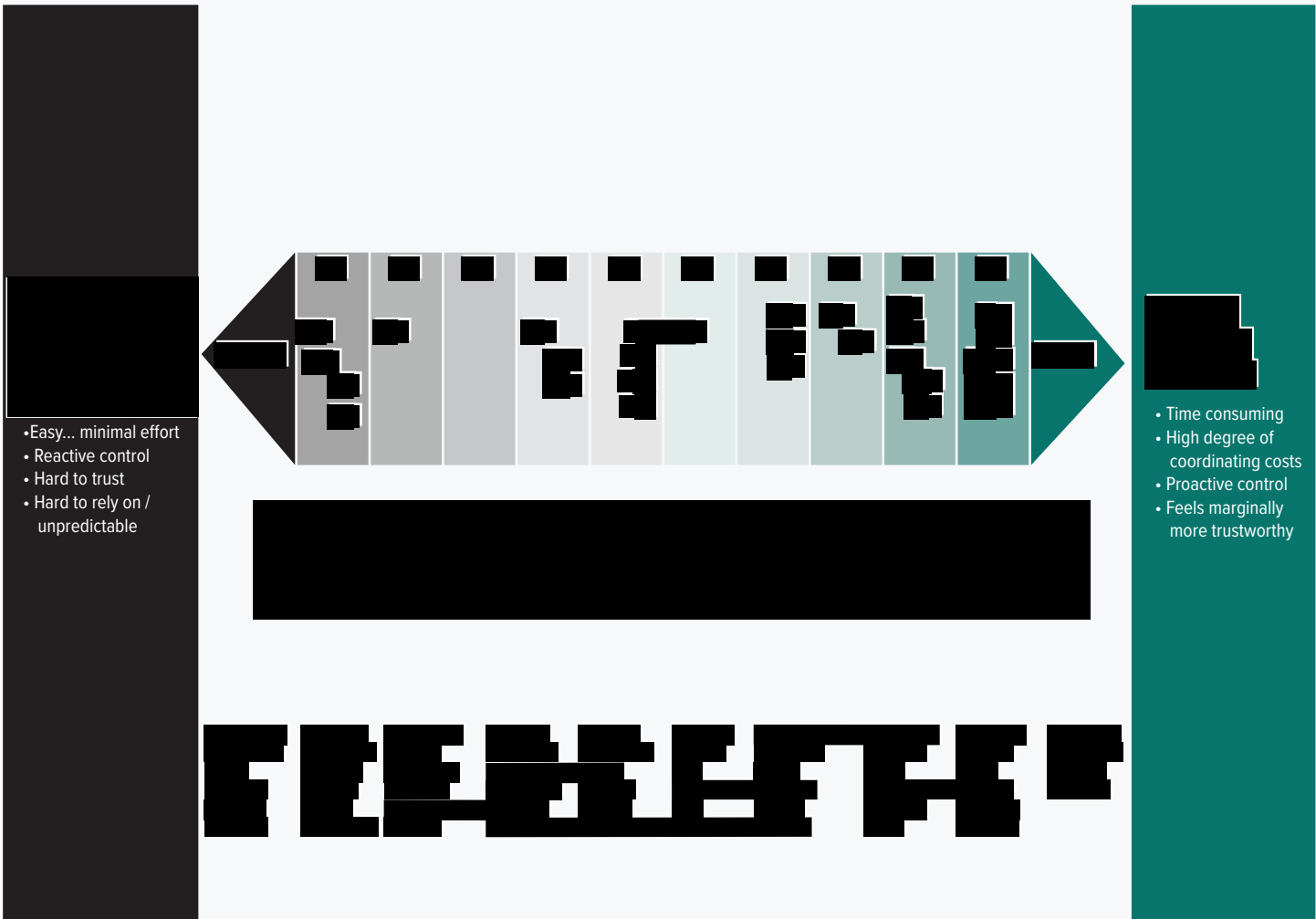
- **Highly Manual Processes** – While community members do indeed rely on a broad array of mobile applications to [REDACTED] and manage their businesses, each of those applications nest within a series of highly manual processes. Whether [REDACTED]

- **Blended Roles and Task Specificity** – [REDACTED] that puts a good deal of strain on the “back office” side of the business. After all, [REDACTED]. Moreover, [REDACTED] can be time consuming. While actively [REDACTED] satisfies the desire to “do something,” the passive acceptance of [REDACTED]

[REDACTED] nests much more comfortably with the roles and routines of those who wear multiple hats in a [REDACTED] company.

Here's a hypothesis worth considering: if you build [REDACTED] in a way that optimizes it for a [REDACTED] then you've not only optimized around a significant share of a highly-fragmented market... you've also built something that could very well prompt operations folks at companies with 10 to 25 (or more) [REDACTED]

[REDACTED] You've created a tool that helps [REDACTED] gain a little more autonomy in their jobs. [REDACTED] won't have to deal with the usual [REDACTED]



4. [Redacted]

[Redacted]

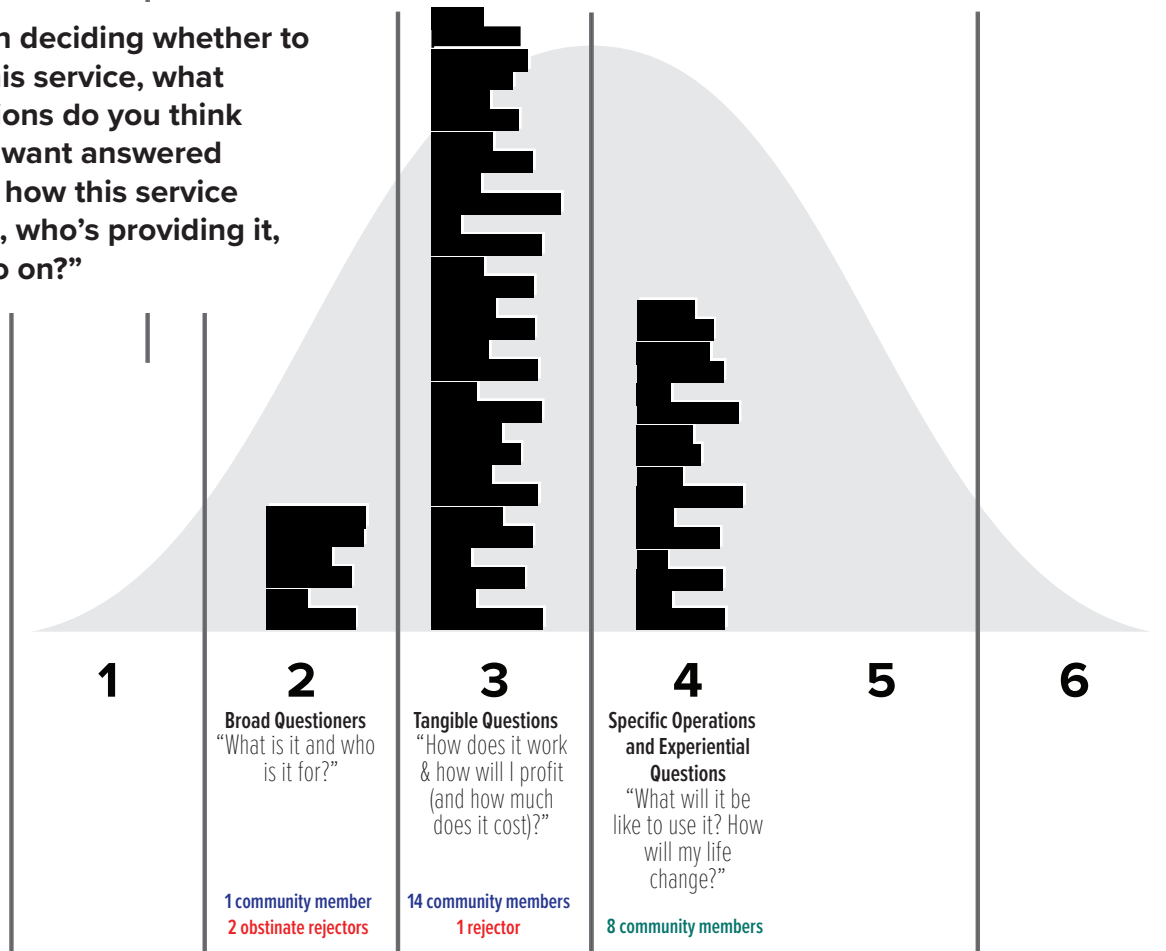
There are absolutely areas of the business that are manual or use Excel spreadsheets to execute manual activities. That bias towards “Excel-with-pen-and-paper” is entirely compatible with owners’ tendency to do things their own way. Remember... they started their own gigs to do things the way they think they need to be done. To them, those methods aren’t perfect. But, they suffice for now – they’re good enough to get the job done the way they like!

5. What do we have to demonstrate to [REDACTED] to get them to buy in to (and trust) the offering? How do we demonstrate the power and potential of the vision in a way that makes it practical for them?

The short answer here is that we have to be absolutely transparent in a way that few major players in the [REDACTED] industry are comfortable committing to. Let's talk about why transparency matters and how it will resonate with the marketplace.

Whenever we test an innovation concept, we grade participants' responses to the concept by assigning them to a behavioral change framework based on 50 years of research by clinical psychologists at Harvard University. Without going into too much detail here, we assign concept acceptors and rejectors, alike, to one of four stages based on the degree of depth they engage the concept. Think of it as the difference between asking, "What is this and who is it for?" and "How will my day-to-day life change when I start using this thing?" When participants want to explore deep specifics and then relate those specifics to their daily lives, you know the concept has 'em hooked.

"When deciding whether to use this service, what questions do you think you'd want answered about how this service works, who's providing it, and so on?"



Here's the good news: the [REDACTED] concept resonated so much during the Day 4 Exercise that 23 (92%) of the 25 community participants responded in a way consistent with the latter stages of the behavioral change framework. In three years of using this approach to explore and validate innovation concepts, we've only seen this kind of engagement once before.

Concisely put: when exposed to the concept, participants evinced a thirst for details. Their wheels started turning immediately. Moreover, transparency isn't just an opportune product marketing and management vehicle – it's also a potent conduit for trust.

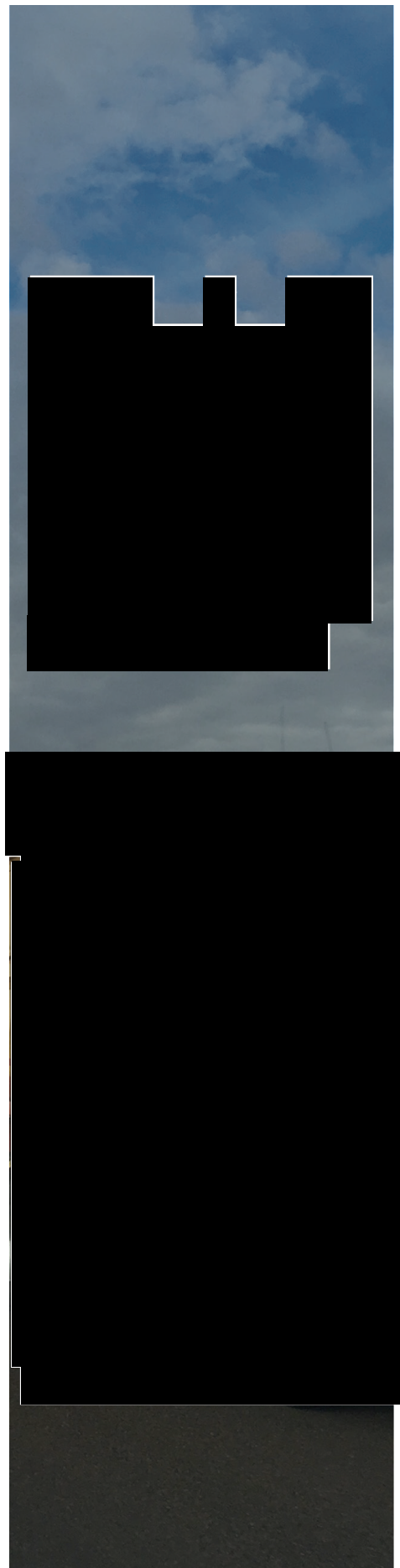
So, how might we be transparent? Here are two quick examples from a product management and product marketing perspective:

- **Product Management** – Architect a feature that displays the projected profit for a [REDACTED] when a [REDACTED]. The inputs to this feature can be based on not only a given [REDACTED] inputs, but on historical performance analytics for the [REDACTED] and the [REDACTED].
- **Product Marketing** – Be up front about potential snags in the onboarding and conversion process in a way that manages expectations on the front end, but could perhaps even nurture prospects into becoming better customers during the onboarding process. Show them how to put themselves in the best position to capitalize on the offering right out of the gate.

6. What risks do owners see in the offering? Will they see a relationship with a [REDACTED] as a threat?

The Day 4 Exercise unpacked two foundational risks (while mitigating a third one altogether). The three chief risks that must be considered in the go-to-market and buyer experience strategies are:

- [REDACTED] Yes... this is by far the most obstinate barrier to the success of the offering. Full stop. Even the most receptive concept adopters became a little tentative when prompted to think about the [REDACTED]. Clearing this barrier should be the highest priority. However, rest assured that addressing [REDACTED] is by no means an unsolvable challenge. It's actually a relatively simple and straightforward one. But, it'll necessitate a good deal of patience and resolve.
- [REDACTED] carries a good deal of baggage with the community members. Many of the community members shared an [REDACTED] because of bad experiences and the entrenched belief that those kinds



[REDACTED]

- **Trusting a [REDACTED]** On Day 3, we conducted an informal poll asking community members to compare the trustworthiness of [REDACTED] to [REDACTED]. By and large, members found [REDACTED] to be more trustworthy. That raised a bit of a caution flag going into the Day 4 Exercise. But, we were relieved to learn that once members were exposed to the [REDACTED] concept, they were indeed willing to keep an open mind to the prospect of working with [REDACTED]. The power of the concept is compelling enough to breed trust.

[REDACTED]

COALESCENTS

The output from online communities is assuredly voluminous. That's qualitative research, y'all.

Now, this is all well and good because we enjoy the reading! But, the abundance of information can be overwhelming. It's not just a matter of combing through the material in order to extract the right insight, but it's also a matter of articulating that insight as crisply and clearly as possible. Concision is everything.

That's why we like to formulate a series of "coalescents" as we read through the research. Think of these as taglines expressing key themes that have emerged in our review.

Why coalescents? Well, they're declarations that get to the specific heart of the matter. But, they're also phrased broadly enough to accommodate the classification of key findings and verbatims in the research. They allow us to organize our thoughts in a way that helps everyone see the forest and the trees.

Coalescent 1: **Embrace Your Constraints**

It's obvious to most anyone that [REDACTED] is not characterized by superfluous spending. Waste isn't an option for these people. But, few take that understanding a step further in order to comprehend that succeeding in [REDACTED] comes down to the ability to be disciplined – to stretch what resources you have at your disposal. Feast or famine, you're always on a diet.

[REDACTED] is fraught with limitations: time and money are scarce. Consequently, there isn't much room for wild hopes and bold dreams – only practical, attainable, realistic ambitions.

Another thing – we tend to conceptualize freedom as the absence of boundaries. But, that's just not true with [REDACTED]. When community members talk about freedom, they're expressing the satisfaction of negotiating limitations, burdens and obligations on their terms.

- "Every penny that I earned cost me my time and health. So there are work that worth its price, reasonable spending minimalism, financial protection for me and my kids."
- "Five words: smart, thrifty, calculating, patience, stability."
- "Pay our bills, help others, provide for family members as needed. It's God's money, we are supposed to use it wisely and He will take care of the rest."



***Waste isn't
an option for
these people.***

Coalescent 2: No Time for Tomorrow

When asked where they see their [REDACTED] company five years from now, many community members articulated a vision for ambitious growth (at least 1/3rd of the community). However, it was clear from the responses that [REDACTED] is so fast-paced and chaotic that it's almost impossible to invest the time to think clearly about the future. More often than not, community members' eyes are fixated on the stretch of road immediately ahead. Glancing up at the horizon doesn't come naturally. Today's imperatives are front and center – [REDACTED]

.. [REDACTED]
 [REDACTED] *chaotic that it's almost impossible to invest the time to think clearly about the future...*

Also, the great deal of stress that [REDACTED] and [REDACTED] face tend to crowd out the emotional energy so vital to planning for the future. Planning is indeed possible. But, it's very, very hard. Growth happens naturally through a dogged focus on the little things. Daily.

- “From today’s perspective, it is difficult to build plans so far. If it goes as we predicted we want to our company double sized with great team of [REDACTED] as partners, database of reliable [REDACTED] and customers.”
- “[REDACTED] Today. It’s as simple as that. The only pressure I feel is the pressure I put on myself.”
- “Nowadays very difficult to find [REDACTED] Canada, the rates very low and I am working from 6 am and sometimes until 9 pm every days to keep my guys rolling. I am building relationships with [REDACTED] but sometimes the people in [REDACTED] companies changing so fast that it doesn’t make sense.”

Coalescent 3: [REDACTED] isn't Very Fair

The word “fair” cropped up quite often in the questionnaire responses in a variety of contexts. A few community members expressed the importance of treating their [REDACTED] fairly. Others talked about the importance of fairness in pricing and transparency in working with [REDACTED]. There’s a desire to inject a sense of fairness and integrity into [REDACTED] – to do things the “right” way. That’s not only a commentary on the community members’ relationships with [REDACTED] but also their motivation for venturing out on their own: they want to do it “my way.”

- [REDACTED]
- [REDACTED]
- [REDACTED]

Coalescent 4: **My Way AND the** [REDACTED]

The Day 1 questionnaire asked community members “Why did you go into business for yourself?” By and large, the answers expressed the importance of freedom, flexibility and control. And, of course, at the root of that longing for freedom and control is a desire to do things better than their old bosses. Community members evinced a willingness to shoulder the risks, be fully accountable and reap the benefits.

Taking the plunge and starting your own [REDACTED] gig requires not only an entrepreneurial spirit, but a stubborn commitment to doing things your way; for better and for worse. Growing tired of [REDACTED] who don’t have their shit together is another motivation. Remember, one of the most common aphorisms in white-collar HR departments is “you don’t quit a job... you quit a boss.” Why should the dynamic between [REDACTED] and employees be any different? Hell, even Depeche Mode told us decades ago that “people are people.” Right?

There’s also a social element to [REDACTED]. Family and friends can be a huge influence on the decision to go out on your own. While the prospect of providing your family with a better life can be inspiring, seeing peers build something can be reassuring. Concomitantly, there’s an aspirational progression from being [REDACTED] to owning your own [REDACTED], ultimately, your own company. Think of it as something akin to getting a promotion.

- “I decided to start my own company as the company I used to work with wouldn’t keep me updated and was not honest about the [REDACTED] as well.”
- “I wanted to the opportunity to be able to have my own business. I had worked over 20 years [REDACTED] else and making them money.”
- “I’ve been in [REDACTED] for 33 years. I decided it was time to advance to the next stage in [REDACTED] and that was to get my own authority.”

Coalescent 5: **Build a Well-Oiled Machine**

By and large, the community members see a relationship between growth and performance. To thrive in [REDACTED] you have to stick the landing on each of the little details, because even a minute failure can cascade into a major catastrophe.

- “I see our company growing and expanding. Having a “well oiled machine” that runs flawlessly.
- “We want to add [REDACTED] and more IT technologies to be more efficient and competitive to provide dedicated service.”
- “It will be at least double in size and more financially stable. As in more income set aside for emergencies, etc. Better planning and better protocol to keep the company from paying other people’s bills and mistakes.”

Taking the plunge and starting your own [REDACTED] gig requires not only an entrepreneurial spirit, but a stubborn commitment to doing things your way.

Coalescent 6: **Grace Under Fire**

So much of owning a small [REDACTED] [REDACTED] entails making snap decisions on the fly. Most of these people don't have the luxury of careful planning and thinking. Whether they sink or swim is entirely up to them, their instincts and their self-discipline.

Moreover, [REDACTED] people are very close to [REDACTED]. So, [REDACTED] are also their pain points in a visceral way. [REDACTED] truly bear the burdens of running the show AND [REDACTED].

- “Feel an immense responsibility to keep the company solvent so it is financially secure so everyone associated with it is taken care of. Pressure, Anxiety, Determination, Reliability, Stability.”
- “On a scale of one to ten my pressure peaks around 7-8. Five words: profitability, paperwork, overhead, safety/compliance, [REDACTED]. These things are pressing me personally and because it's imperative that I succeed so everyone else does.”
- “Unfulfilled, sadness, challenging, unfairness, unmotivated. In the [REDACTED] business, I treat my staff the way I want to be treated. I ask and value their opinions about the challenges that they face [REDACTED]. I have implemented some of their suggestions and it has worked. It is really a struggle getting [REDACTED] who are willing to [REDACTED] sigh!!! It is a gradual process but we will get there.”

Coalescent 7: [REDACTED] **Remorse**

Ever buy a car and drive off the lot haunted by the suspicion that you paid too much money? [REDACTED] is quite similar. It's the sinking feeling in the pit of your stomach that in accepting [REDACTED] likely left a good bit of money on the table. Of course, the answer to that question will always be a mystery. That's why a little transparency will go a long way in an industry that can be ruthlessly competitive.

- “Be careful of [REDACTED]. They are not all looking out for your best interests. Some are only in the business to make all the money for themselves.”
- “Always know your worth. [REDACTED] will try to low ball you if you don't know what the [REDACTED].”
- “Be patient and never take their first offer. Always counteroffer.”

Coalescent 8: [REDACTED]

The community had a jaundiced attitude towards [REDACTED]. Many of them shared an aversion to [REDACTED] because of bad experiences and the belief that those kinds of [REDACTED] don't honor appointment times and [REDACTED] with respect to [REDACTED] and [REDACTED]. So, to an extent, the promise of [REDACTED] might be more of a burden than a benefit. When describing the ideal [REDACTED] the community sentiment was: [REDACTED] w [REDACTED]

- [REDACTED]
- | [REDACTED]
- | [REDACTED]

Coalescent 9: **This is Amazing! So... What's the Catch?**

After watching the explainer video for the Day 4 Exercise, the community members were asked to share five words or thoughts that came to mind as they watched the video. Of the 26 responses to that request, 21 could be neatly sorted into Acceptors (9), Acceptors with Caveats (10) and Rejectors (2). That's overwhelmingly encouraging, but it reinforces the heightened burden of proof when persuading a jury that's prone to cynicism. Even the most promising offering is going to need to be buttressed by a good deal of reassurance.

- "That would be nice but I'm sure it's not possible or easy as it sounds."
- "Seems too good to be true."
- "I want to believe and we can definitely try it."



Coalescent 10: Consistency Earns Trust (and Chills Me Out)

Let's set aside the powerful technology and the brilliant synergies between an [REDACTED] and [REDACTED]. The real opportunity here is to make, and fulfill practical promises to do things the right way; to inject a high degree of transparency and trust into [REDACTED]. Providing that sort of consistency in a chaotic and complex industry would be the most [REDACTED] thing ever. It would break all of the rules, but not just for the sake of rebelliousness. It's because the existing rules aren't working. That consistency will not only earn trust, but will also help cynical, hyper-stressed customers relax a bit.

- [REDACTED] I want payment to be on time (if that is also though them). I want honest communication about [REDACTED].
- "I would want them to be truthful. It's always been a common saying in the [REDACTED] that the easiest way to see if a [REDACTED] is lying is to see if his or her mouth is moving. It would be nice is someone could break this old saying. Just be truthful and honest."
- "I would trust it more [REDACTED] because they probably already understand a [REDACTED] problems."

A WORD ABOUT THE DAY 1 ACTIVITY

The Day 1 Exercise included an activity that asked participants to share a photo that represents why they started their own [REDACTED] company (or, in the alternative, why they went into [REDACTED]). Three overarching themes are apparent from the 27 community members who participated in the Day 1 Activity.

Family

A few of the photos shared were of couples and family on vacation, at cookouts and so on. One picture in particular was of a father boosting his little boy into the [REDACTED]. Moreover, even the photos that didn't necessarily relate to family were accompanied by descriptions that referred to the importance of building a business with, and for, those you love.

Perseverance

Many pictures represented perseverance and hope. One such example was a picture of a sunrise at the end of railroad tracks: "a brighter future." The corresponding explanation for that photo: "[REDACTED] will never go away. And I want to be part of the solution for a long time to come. I want my kids to be there, too."

Another picture was of the sun peeking through grey clouds after a storm. The woman who posted it had been treated poorly in a prior life and had found an honorable man with a good heart who loves [REDACTED]. "After every storm the sun will come out, no matter how bad the storm is. After being married for 25 years, and being treated bad. (THE STORM) you find a man with a good heart that love [REDACTED] (THE SUN). I couldn't help but to love [REDACTED] and dealing with all the work."

Here's another picture worth mentioning: the sun rising in the horizon, over a stretch of interstate highway, [REDACTED]. "There will be good days, there will be not so good days. No matter what happens, keep moving forward. A stressful environment can be challenging at times but never forget your family and friends. Remember to smile every day. Happiness is all that matters :)"

Pride and Empowerment

Of course, there's much to appreciate about the [REDACTED]. Naturally, many of the photos were of [REDACTED] and the corresponding explanations expressed a good deal of pride and adoration for [REDACTED].

We've talked a bit about the constraints that accompany [REDACTED]. But, owning your own equipment and running [REDACTED] is an empowering thing. Here's one explanation that accompanied a collage-style photo of [REDACTED]. "I am in [REDACTED] a



So we decided to start this business and its alot of work but im loving it.”

Empowerment can be manifested in many ways. Another picture titled “Girl Power” featured two girls . “Where women can do just as well as a man in this industry, and the bonds we make with other women in the same industry are stronger than most.”

Now, this may sound like mere editorializing, but it’s our job to make these observations (and apply them accordingly). And, yes, this could bring us to the threshold of other mysteries. But, here we go...

This corner of doesn’t seem to be characterized by the gender antipathy we’ve seen in the broader culture these days. Is there competition? Absolutely! Is often bereft of fairness and trust? Apparently so. But, there’s also a great deal of comity in . In many instances, community members were husband-and-wife teams who strive together. Moreover, a is an equal opportunity – it’s powerful enough to grant anyone otherworldly strength. That strikes us as a truly remarkable thing – and something the world could probably use more of.

