



CAPSTONE - PJM6910

SOCIAL MEDIA MARKETING
STRATEGY & ROADMAP

FOR KATHY VARELA CREATIVE

PRESENTED BY: TEAM 3

PMO: PROFESSOR AVINASH PATIL

MARCH, 20 2026



Agenda

- Introduction
- Scope Overview
- Cost Overview
- Time Requirements
- Resources
- Risks & Mitigation
- Recommendations

OUR TEAM



ANUREKHA

Project Manager

Communications &
Content Specialist
Project & Program
Management, Editorial &
Branding, Stakeholder
Management



HANYIN

Research & Quality Review

- Scope & Assumptions
- WBS Structure & Logic
- Research Synthesis
- Quality & Consistency Review



MUJIE

Integration Owner

- Quality & Consistency Review
- Key Findings & Insights Integration
- Data Sources Coordination



YIXIN

***Scheduler, Facilitator
& Decision Log Owner***

Project Planning · Scope
Definition · WBS
Development ·
Stakeholder Alignment ·
Risk Identification



JINGWEN

Research & Strategy

Key Findings & Insights
Synthesis
Data Sources, Cleaning &
Preparation



CHENXI

***Slides, Research &
Visual Support Lead***

Project Resource
Management, Agile
Project Management,
Project Evaluation

PROJECT



PROJECT NAME

Social Media Marketing Strategy & Roadmap for Kathy Varela Creative



PURPOSE

Deliver a 12-month marketing roadmap for Kathy Varela Creative to support predictable and scalable growth through current state analysis, baseline clarification, competitor research, refined service packaging, and an organic Instagram strategy with a 60 to 90 day content calendar framework.



Growth intent

Targeting \$96,000+ in annual revenue by growing recurring clients, launching digital products and workshops, and expanding capacity over time.



SCOPE OVERVIEW



MAJOR DELIVERABLES



DELIVERABLE SET 1: BUSINESS MODEL CANVAS & BASELINE

- Use sponsor inputs plus last 3 months Instagram performance to set a clear baseline of how the studio operates today.
- Identify what is working, what is not, and key gaps.



DELIVERABLE SET 2: MARKET & COMPETITOR INSIGHTS

- Conduct competitor and market analysis of comparable studios' service offerings, positioning, and social media presence to identify how peers structure, communicate, and differentiate their packages.



DELIVERABLE SET 3: OFFER & PACKAGING STRATEGY

- Evaluate pricing benchmarks and translate findings into a revised and clearer service packages.

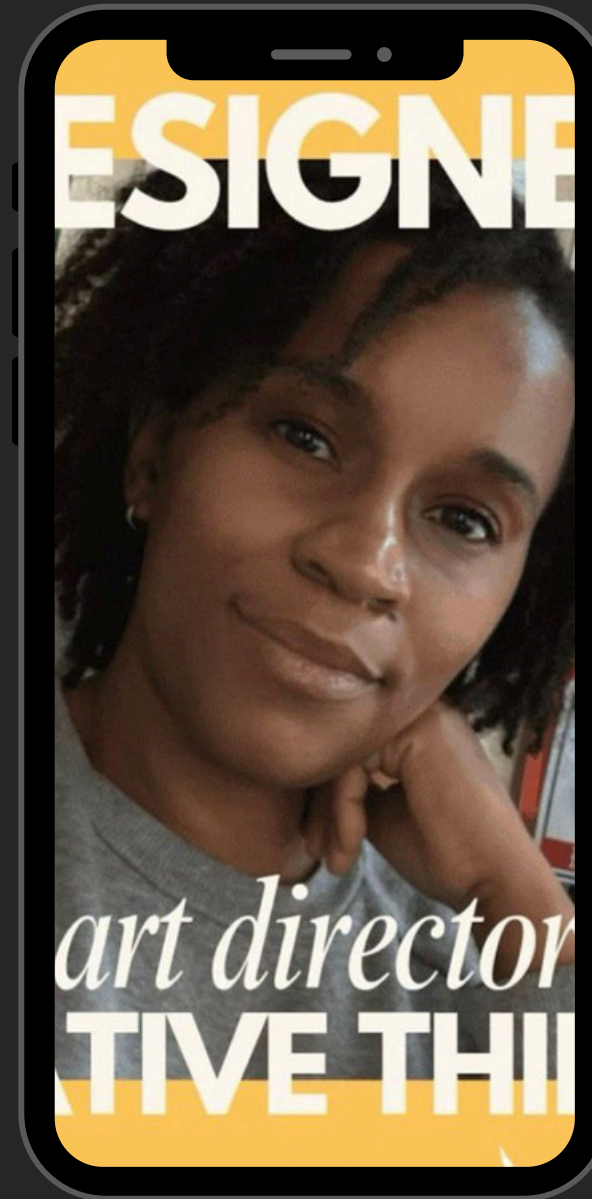
CONTENT STRATEGY: THEMES, POSTING RHYTHM, FORMATS, IDEAS

- Social Media Content Plan for Instagram including content themes, posting rhythm, post formats, post ideas, and a 90-day content calendar framework to drive inquiries.



DELIVERABLE SET 4 - SOCIAL MEDIA MARKETING STRATEGY

INSTAGRAM MARKETING PLAN



- Instagram Profile Optimization Checklist, including bio, highlights, pinned posts, link in bio, keyword and SEO updates, and CTA improvements to increase inquiries.



TOOLKIT

- Content Production Toolkit, including caption framework with hooks, hashtags and keyword sets aligned to the sponsor's audience and services.

EXCLUSIONS

1 Legal, finance, and confidential data

Legal, tax, accounting, business filings, audits, eligibility verification, tax documents, or access to confidential client data

2 Funding and external representation

Guaranteed results or funding, investor outreach or pitching, ongoing investor relations, negotiating on sponsor’s behalf, submitting applications, or managing submissions and external outreach

3 Full execution and production

Full rebrand, logo redesign, website build, final graphic design beyond templates, professional shoots, reels editing, building asset library.

4 Social operations and paid growth

Daily posting, scheduling, community management, comment or DM handling, influencer coordination, paid ads or boosting, media buying, affiliate or creator programs, platform operations or guarantees of follower growth, leads, or revenue.

BUSINESS MODEL CANVAS

MISSION & IMPACT

- **Mission:** Help Kathy Varela Creative clarify her offers and build a social media and marketing plan which is repeatable and that attracts and converts clients.
- **Impact:** Increase visibility, strengthen credibility, and create a more predictable, sustainable lead pipeline.

KEY PARTNERS

- **Project based collaborators:** Copywriters, web developers, photographers, illustrators, SEO (used to expand delivery capacity per project)
- **Referral partners:** Past clients, aligned creative agencies, business coaches, community orgs who refer clients
- **Platform and tool partners:** Google Workspace, Canva, Adobe, Asana, Zoom
- **Funding ecosystem targets:** Grant makers, sponsorship partners, competitions, small business programs and accelerators
- **Professional services:** Accountant, legal advisor (as needed), potential Virtual Assistant support

KEY ACTIVITIES

- **Brand identity development** (logos, typography, color systems, style guides).
- **Website design** including content strategy, wireframes, mobile optimization, and SEO.
- **Bundled identity + website launches** for a cohesive brand presence.
- **Starter brand kits** for startups
- **Custom creative projects** (campaign and launch collateral like pitch decks, social media kits, event collateral, publications).
- **Monthly creative support retainers** (ongoing design hours, quick turnaround, monthly strategy check ins).
- **Photography, art direction,** and creative consulting or brand strategy sessions as add on services.

VALUE PROPOSITION

- **Clarify packages and offers:** Define clear boundaries, timelines, deliverables, and starting price ranges to reduce buyer uncertainty.
- **Build a repeatable IG and LinkedIn system:** Create a 60 to 90 day content calendar with consistent series formats and strong CTAs.
- **Improve profile and link to inquiry flow:** Tighten positioning, optimize bio and links, and reduce steps to boost inquiry clicks.
- **Create templates and a caption toolkit:** Provide reusable post templates, hooks, CTAs, and caption frameworks to publish faster.
- **Strengthen culturally rooted identity and messaging:** Translate mission into a clear identity system that aligns visuals and language across key touchpoints.
- **Systemize a high trust delivery process:** Set milestones, review rounds, and decision points that support confident client decisions.
- **Enable scalable handoff and ongoing support:** Deliver guidelines, organized assets, and a maintainable site foundation, with an optional retainer path for consistency.
- **Clarify Kathy's value proposition:** Articulate unique promise, outcomes, and differentiators of her strategy plus design so ideal clients understand why her work is worth investing in.

CUSTOMER SUPPORT

- **Consultative discovery call** with guided package recommendation
- **Structured process:** kickoff, milestones, review, handoff
- **Clear scope, timelines, deliverables** to reduce buyer risk
- **Collaborative feedback** with defined decision points
- **Guidance** so clients can use brand and site
- **Retainer option** for ongoing support and repeat work
- **Pre-inquiry nurture** by consistent IG and LinkedIn proof

CAPSTONE SUPPORT TO ACTIVITIES

- **Baseline summary:** focus on highest impact fixes.
- **Competitor insights:** sharpen differentiation and pricing confidence.
- **Revised service menu:** clarify packages; speed sales.
- **IG and LinkedIn plan:** stay consistent
- **60 to 90 day calendar/CTAs:** Turn posts into inquiries.
- **Profile and link flow:** Increase clicks to inquiry page.
- **Templates and captions:** Create faster & stay on brand.

CUSTOMER SEGMENTS

Primary

- Mission driven founders, underrepresented founders, and cultural creators
- Founder led service businesses needing premium brand and web trust signals
- Nonprofits and community organizations needing clear story and consistent design

Secondary

- Growing brands needing identity, website, and campaign creative
- Past clients needing ongoing retainer support

Emerging

- Workshop and training participants
- Digital product and template buyers

COST STRUCTURE

- **Founder labor:** Strategy, design, and client management time are the primary cost drivers.
- **Contractor support:** Project-based collaborators such as copywriters, developers, and specialists.
- **Tool stack and subscriptions:** Design software, project management systems, hosting, and analytics tools.
- **Marketing expenses:** Website maintenance, content production, and potential paid promotion.
- **Administrative services:** Accounting, legal support, and operational compliance costs.

KEY RESOURCES

- **Research and strategy:** Analyze Kathy's positioning, offers, messaging, and competitors to set priorities.
- **Competitor benchmarking:** Compare similar studios to spot what is working, offers, trust signals, and funnels, and translate into gaps & opportunities for Kathy.
- **Frameworks and templates:** Use baseline and gap analysis, content system frameworks, and case study templates to make recommendations repeatable and easy to execute.
- **Synthesis and copy support:** Convert research into clear messaging guidance, hooks, CTAs, and publish-ready outlines that Kathy can use right away.
- **Team capacity and quality control:** We divide research streams, cross-check insights, and align recommendations as a group to reduce blind spots and keep quality consistent.

CHANNELS

- **Website (primary conversion hub)**
Portfolio, case studies, and inquiry form.
- **Instagram (discovery and storytelling)**
Process breakdowns, brand reveals, and educational content.
- **LinkedIn (authority and professional visibility)**
Founder positioning and network building.
- **Referral network**
Past clients, collaborators, and aligned agencies.
- **Community and industry events**
Workshops, panels, and trust-building partnerships.

REVENUE STREAMS

- **Project-based brand & website packages**
- Bundled identity + website launches
- **Startup brand kits (fixed-price)**
- **Custom creative projects (campaigns, launch assets)**
- Monthly creative retainers
- Brand strategy workshops / consulting sessions
- Template & digital product sales
- Training programs / workshops
- Referral-based client work

COST OVERVIEW

- **Bottom-up estimating based on WBS work packages**
- **Labor cost estimated using standard consulting hourly rates**
- **Includes labor effort and minor tool or project support costs**
- **This is a strategy development project; marketing execution and media spend are excluded**

| WBS Code | Major Phase / Deliverable | Estimated Effort (Hrs) | Labor Cost (\$50/hr) | Logistics / Materials | Support & Admin | Total Cost |
|----------|---------------------------------------|------------------------|----------------------|-----------------------|-----------------|------------|
| 1.1 | Project Management & Coordination | 20 | \$1,000 | \$0 | \$150 | \$1,150 |
| 1.1.1 | Scope Alignment & Assumptions | 6 | \$300 | \$0 | \$50 | \$350 |
| 1.1.2 | Status Tracking & Coordination | 8 | \$400 | \$0 | \$50 | \$450 |
| 1.1.3 | Submission Management | 6 | \$300 | \$0 | \$50 | \$350 |
| 1.2 | Data Collection & Current Analysis | 24 | \$1,200 | \$100 | \$100 | \$1,400 |
| 1.2.1 | Collect Sponsor Inputs & Social Data | 8 | \$400 | \$50 | \$30 | \$480 |
| 1.2.2 | Analyze Social Media Performance | 10 | \$500 | \$0 | \$40 | \$540 |
| 1.2.3 | Document Current State Insights | 6 | \$300 | \$50 | \$30 | \$380 |
| 1.3 | Market & Competitor Research | 34 | \$1,700 | \$50 | \$150 | \$1,900 |
| 1.3.1 | Identify Comparable Studies | 8 | \$400 | \$0 | \$40 | \$440 |
| 1.3.2 | Capture Competitor Services & Pricing | 10 | \$500 | \$50 | \$40 | \$590 |
| 1.3.3 | Analyze Competitor Positioning | 10 | \$500 | \$0 | \$40 | \$540 |
| 1.3.4 | Synthesize Market Trends | 6 | \$300 | \$0 | \$30 | \$330 |
| 1.4 | Business Baseline & Service Strategy | 24 | \$1,200 | \$100 | \$100 | \$1,400 |
| 1.4.1 | Draft Business Model Canvas | 8 | \$400 | \$0 | \$30 | \$430 |
| 1.4.2 | Business Baseline & Challenges | 8 | \$400 | \$0 | \$30 | \$430 |
| 1.4.3 | Define Revised Service Menu | 8 | \$400 | \$100 | \$40 | \$540 |
| 1.5 | Social Media Strategy Development | 24 | \$1,200 | \$0 | \$100 | \$1,300 |
| 1.5.1 | Define Content Themes & Pillars | 10 | \$500 | \$0 | \$40 | \$540 |
| 1.5.2 | Define Posting Rhythm & Format | 8 | \$400 | \$0 | \$30 | \$430 |
| 1.5.3 | Align Content to Lead Generation | 6 | \$300 | \$0 | \$30 | \$330 |
| 1.6 | Content Planning & Enablement | 40 | \$2,000 | \$100 | \$150 | \$2,250 |
| 1.6.1 | Build 60-90 Day Content Calendar | 15 | \$750 | \$0 | \$50 | \$800 |
| 1.6.2 | Create Profile Optimization Checklist | 10 | \$500 | \$0 | \$50 | \$550 |
| 1.6.3 | Develop Content Production Toolkit | 15 | \$750 | \$100 | \$50 | \$900 |
| 1.7 | Review & Finalization | 18 | \$900 | \$100 | \$100 | \$1,100 |
| 1.7.1 | Internal Quality Review | 4 | \$200 | \$0 | \$20 | \$220 |
| 1.7.2 | Sponsor Review & Feedback Capture | 4 | \$200 | \$50 | \$20 | \$270 |
| 1.7.3 | Team Review & Consolidation | 4 | \$200 | \$0 | \$20 | \$220 |

ESTIMATED COST

- Total estimated project effort: 184 hours

- Core consulting labor rate: \$50/hour

- Support resource rate: \$30/hour

- Total Cost Baseline:

Labor: \$9,200

Tools & materials: \$450

Support resources: \$850

Cost Baseline
➔ **\$10,500**

| Component | Amount |
|----------------------------|----------|
| Approved Cost Baseline | \$10,500 |
| Contingency Reserve (10%) | \$1,050 |
| Budget at Completion (BAC) | \$11,550 |

Note: An additional 5% Management Reserve (\$525) is recommended for unforeseen scope changes, bringing the total project budget to

\$12,075.

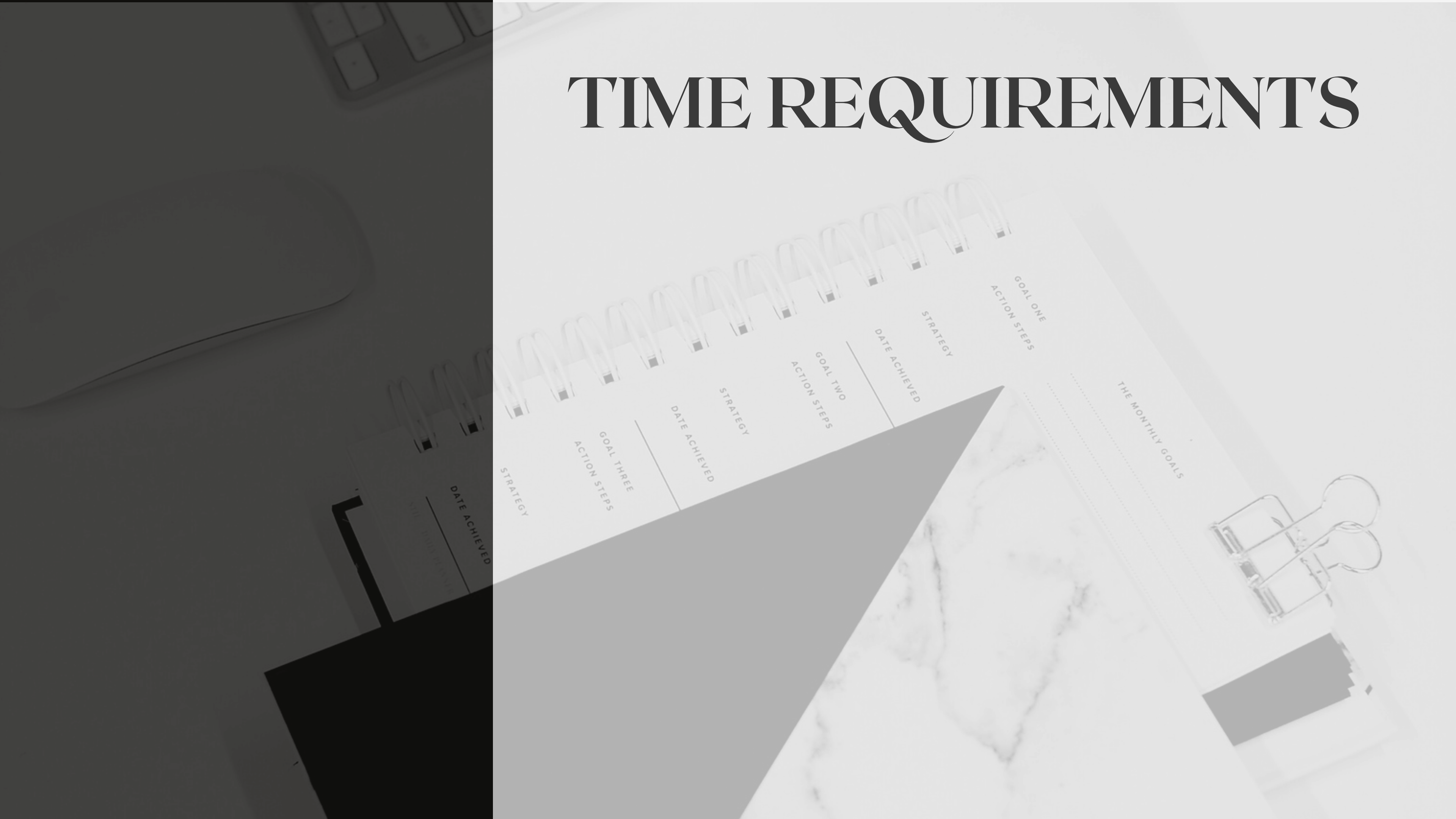
MAJOR COST DRIVERS

- **Content Planning & Enablement – highest cost phase (\$2,250)**
- **Market & Competitor Research – second highest (\$1,900)**
- **Data Collection / Business Baseline / Strategy Development – mid-tier cost drivers (\$1,300–\$1,400)**

STAKEHOLDERS

| Stakeholder | Role | Influence | Management Approach |
|----------------------|--|---------------|---|
| Kathy Varela | Sponsor and primary approver | High / High | Milestone reviews, concise approval requests, feedback tracking |
| Capstone Instructor | Evaluator and governance | High / Medium | Align to rubric, maintain schedule, ensure submission quality |
| Anurekha Chakraborty | Project Manager and final integrator | High / High | Coordinate team, track progress, manage risks, escalate blockers |
| Hanyin | Social audit and sponsor input owner | High / High | Request inputs early, track gaps, validate data |
| Jingwen | Competitor research owner | High / High | Confirm research scope, maintain consistency, synthesize findings |
| Mujie and Yixin | Content calendar owners | High / High | Align content pillars, finalize cadence, build reusable framework |
| Chenxi | Checklist, toolkit, and formatting owner | High / High | Consolidate inputs, ensure usability, maintain formatting quality |

TIME REQUIREMENTS



SCHEDULE

| Workstream | Timeline | Owner | Output / Deliverable |
|---|---------------------|----------------------|--|
| Inputs & Audit | Feb 15 to Feb 18 | Hanyin | Sponsor input folder and cleaned social data pack |
| Competitor & Market Research | Feb 18 to Feb 22 | Jingwen, Hanyin | Competitor table and market synthesis |
| Baseline & Service Packaging | Mar 1 to Mar 2 | Anurekha | Business baseline, current state summary, and revised service menu |
| Submission 1 Integration | Completed Mar 6 | Anurekha | Integrated Submission 1 draft |
| Strategy Development | Ongoing, due Mar 15 | Hanyin, Anurekha | Instagram content strategy |
| Content Planning | Ongoing, due Mar 15 | Mujie, Yixin, Chenxi | Content calendar, profile checklist, and toolkit |
| Final Review & Submission | Mar 16 to Mar 20 | Team | QA reviewed and finalized submission |

KEY PHASES



MILESTONES

1

Stage 1

Collect sponsor materials plus 3 month IG data, confirm assumptions

2

Stage 2

Social media performance audit and insights

3

Stage 3

Competitor dataset completed and market research synthesized into implications

4

Stage 4

Business Model Canvas, Business Baseline Summary, and Current State Summary drafted

5

Stage 5

Revised service menu and packages drafted

6

Stage 6

Submission 1: Integrated into a cohesive pack with consistent flow and citations

7

Stage 7

Submission 2: Content strategy, 60–90 day calendar framework, profile optimization checklist, content toolkit

RESOURCES

| Resource Type | Primary Resources Required | How They Will Be Sourced |
|--|---|---|
| Sponsor Inputs | Business background, service details, website information, current offers, brand direction, and approval feedback | Provided directly by Kathy through meetings, milestone reviews, email feedback, and decision checkpoints |
| Social Media Data | Instagram analytics, profile performance, content engagement | Sourced from sponsor shared platform exports and native account analytics |
| Business Analysis Inputs | Current state observations, baseline strengths and gaps, audience and offer clarity, and existing funnel structure | Developed by the team using sponsor materials, website review, and internal analysis |
| Competitor Research | Competitor websites, service menus, pricing signals, timelines, proof assets, testimonials, and social content patterns | Collected from publicly available websites and social channels of comparable design studios |
| Market Evidence | Industry trends, content practices, buyer expectations, and visible patterns across similar boutique studios | Sourced from public market research and benchmarked competitor examples |
| Strategy Development Resources | Content pillars, messaging themes, CTA structure, buyer journey logic, and platform specific recommendations | Developed through detailed research on similar sized design studios, their Instagram content patterns, trust signals, case study formats, educational posts, and inquiry focused CTAs, then tailored using Kathy's audit and baseline findings. |
| Content Planning Resources | 60 to 90 day content calendar, posting structure, post types, hooks, caption direction, and checklist items | Developed by using the strategy framework, sponsor context, and research on how similar design studios sequence educational, offer based, process, and case study content. |
| Collaboration & Documentation Tools | Shared drives, presentation files, working drafts, trackers, and review logs | Sourced through Google Drive and other free or university available collaboration tools |

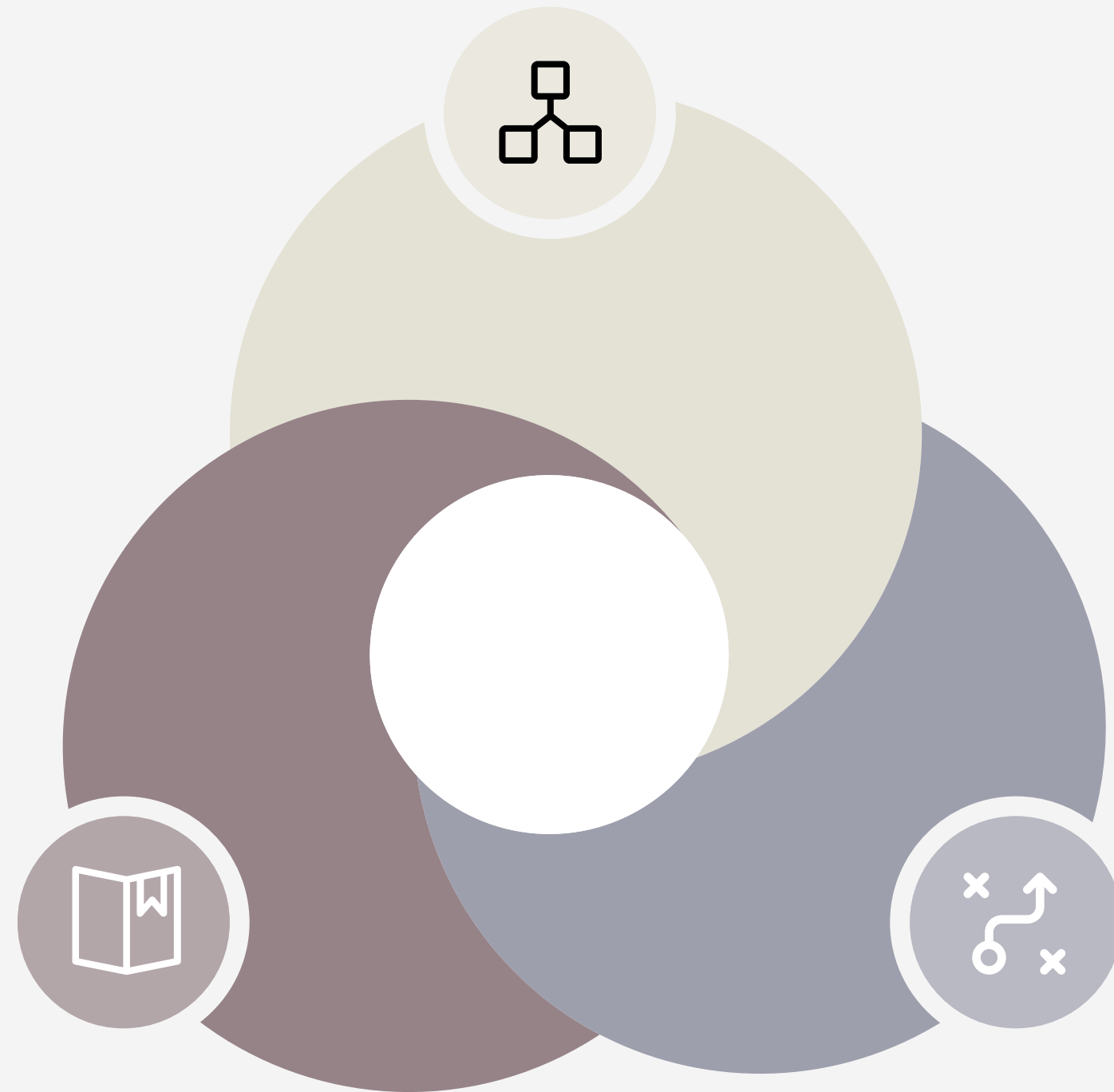
RISKS & MITIGATION

| Risk ID | Risk Description | Probability | Impact | Mitigation Strategy | Owner |
|---------|--|-------------|--------|--|-----------------------|
| 1 | Sponsor feedback or approval delays may slow milestone progress | Medium | High | Schedule milestone-based reviews, send concise decision requests, and proceed with documented assumptions if feedback is delayed | Project Manager |
| 2 | Missing or incomplete Instagram analytics data limits accuracy of performance analysis | Medium | Medium | Use publicly observable metrics and competitor benchmarks as proxy data until analytics exports are available | Data Analysis Lead |
| 3 | Weak or inconsistent competitor data -unreliable recommendations | Low | Medium | Cross-check multiple competitor sources and validate findings with market benchmarks | Research Team |
| 4 | Scope creep (e.g., requests for paid ads or website redesign outside scope) | Medium | High | Enforce scope baseline and document any requested changes through change control process | Project Manager |
| 5 | Too many revision rounds before submission may cause schedule delays | Medium | High | Limit revision cycles, conduct internal quality review before sponsor submission | Quality Lead |
| 6 | Team coordination or version control problems may cause duplicated work | Low | Medium | Use shared drive version control and assign clear ownership for each deliverable | All Workstream Owners |

CURRENT STATE SUMMARY



CURRENT STATE SUMMARY



01 Growth Ambition

\$96K+ annual target with 2 to 3 new clients/month and 2+ recurring clients. KVC is aiming for premium, low-volume, relationship-based growth.

02 Process Visibility Gap

Studio has strong internal strategy and process, but much of it remains invisible before inquiry.

Website builds trust, Instagram supports visibility, but the funnel is still too dependent on direct inquiry.

03 Revenue & Proof Gap

Recurring revenue begins at \$500/month, but one-off custom work carries much revenue burden. Cultivated Accounting is a strong proof point, but KVC still needs 3 to 5 strong case studies for premium \$10,000+ sales.

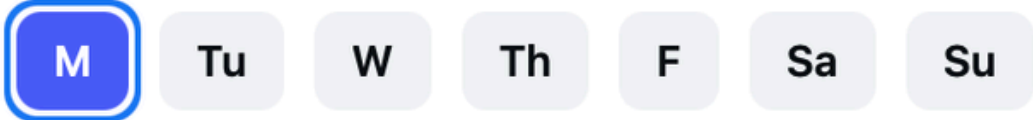
SOCIAL MEDIA PERFORMANCE & CURRENT INSIGHTS

Followers ⓘ

770

Total followers

Most active times



● Followers

- Monday performs best.
- Strongest posting window between 9 AM and 3 PM, and peak at 3 PM.

Manage ads ⓘ

Most recent ▾

Status ▾

Goal ▾

Paused



Views 1,348
Messaging conversations started 1
Spend \$27.79
Audience Local Biz
[View insights](#)

Delete

Resume

Completed • Jan 23, 2026



Views 442
Website visits 7
Spend \$3.99 of \$4.00
Audience Local Businesses
[View insights](#)

Delete

Boost again

Completed • Jan 14, 2024



Views --
Website visits 9
Spend \$15.00 of \$15.00
Audience People you choose through targeting
[View insights](#)

Delete

Boost again

SOCIAL MEDIA PERFORMANCE & CURRENT INSIGHTS

Account insights

Views ⓘ

26,444

Views

| | |
|---------------|-------|
| Followers | 72.7% |
| Non-followers | 27.3% |

Accounts reached **2,556**

By content type

- All
- Followers
- Non-followers

| | | |
|---------|--|-------|
| Stories | | 93.2% |
| Reels | | 5.2% |
| Posts | | 1.6% |

● Followers ● Non-followers

Interactions ⓘ

368

Interactions

| | |
|---------------|-------|
| Followers | 75.3% |
| Non-followers | 24.7% |

Accounts engaged **181**

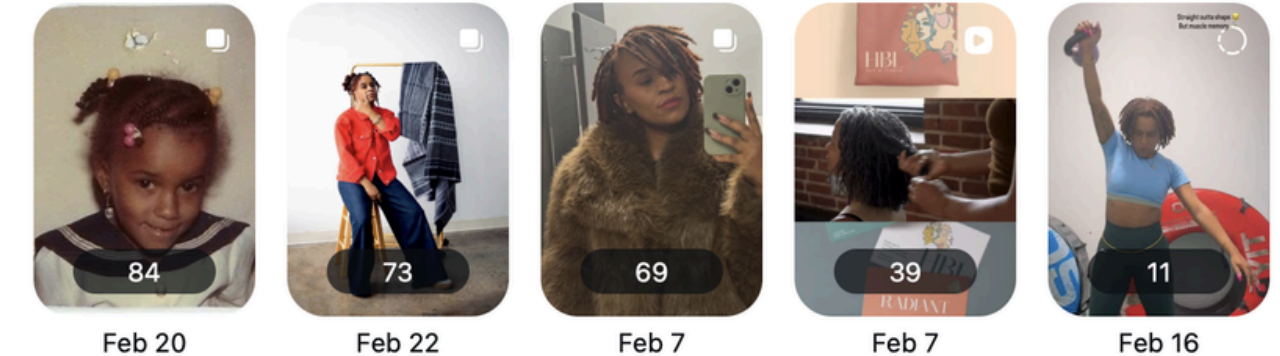
By content interactions

| | | |
|---------|--|-------|
| Posts | | 65.5% |
| Stories | | 22.6% |
| Reels | | 12% |

● Followers and non-followers

Top content based on interactions

[See all](#)



Profile ⓘ

418

Profile activity

Profile visits **407**

External link taps **11**

Followers ⓘ

770

Total followers

Most active times

M Tu W Th F Sa Su

KEY CHALLENGES AND GAPS

1. AESTHETIC TRAP VS STRATEGY PROOF

Content shows the final design, but not enough of the thinking behind it. More process-led Reels and decision-based carousels are needed.

3. CONTENT REPURPOSING INEFFICIENCY

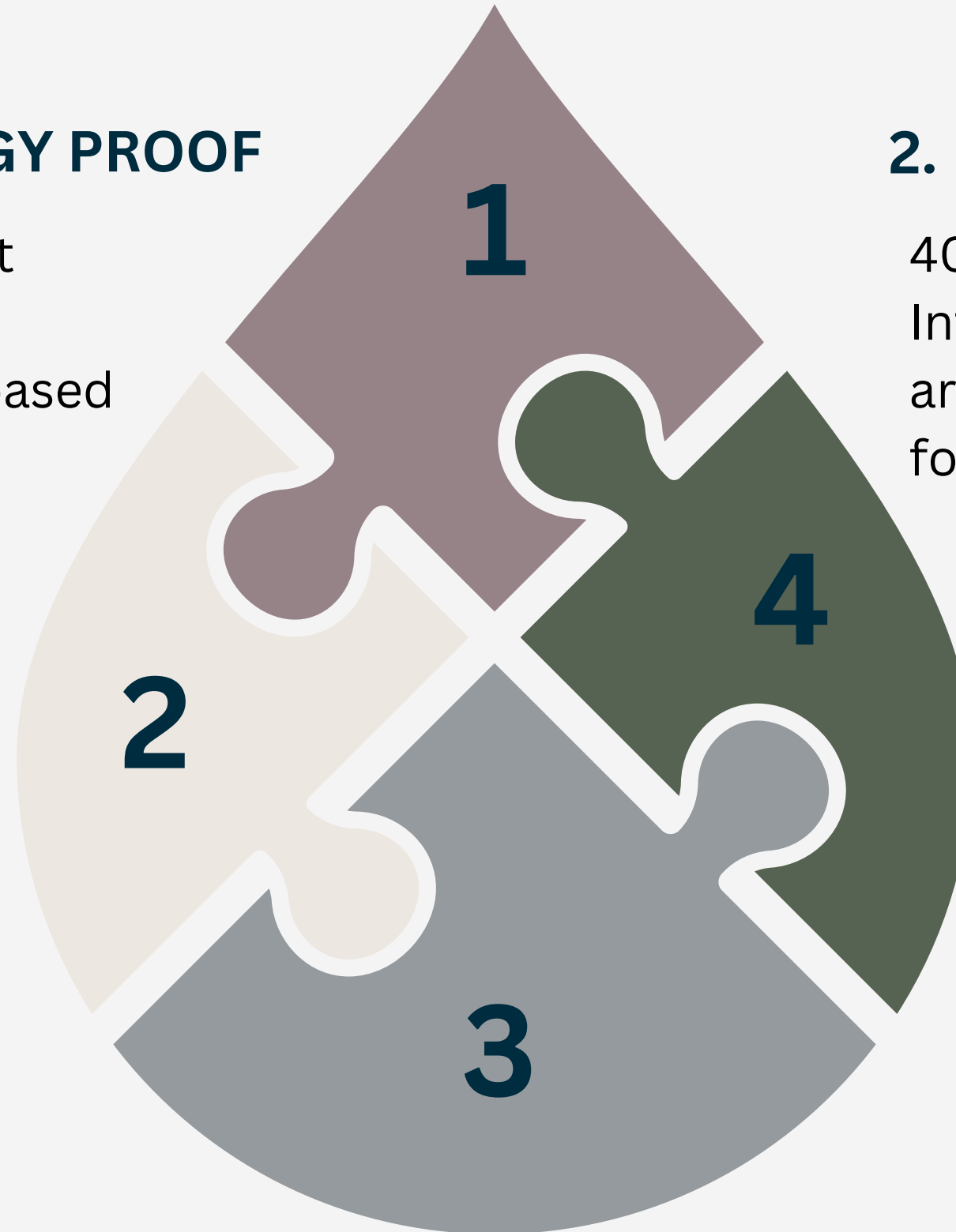
KVC is not yet using a system where 1 project becomes 6+ posts. This makes content creation harder and less scalable.

2. HIGH SALES FRICTION

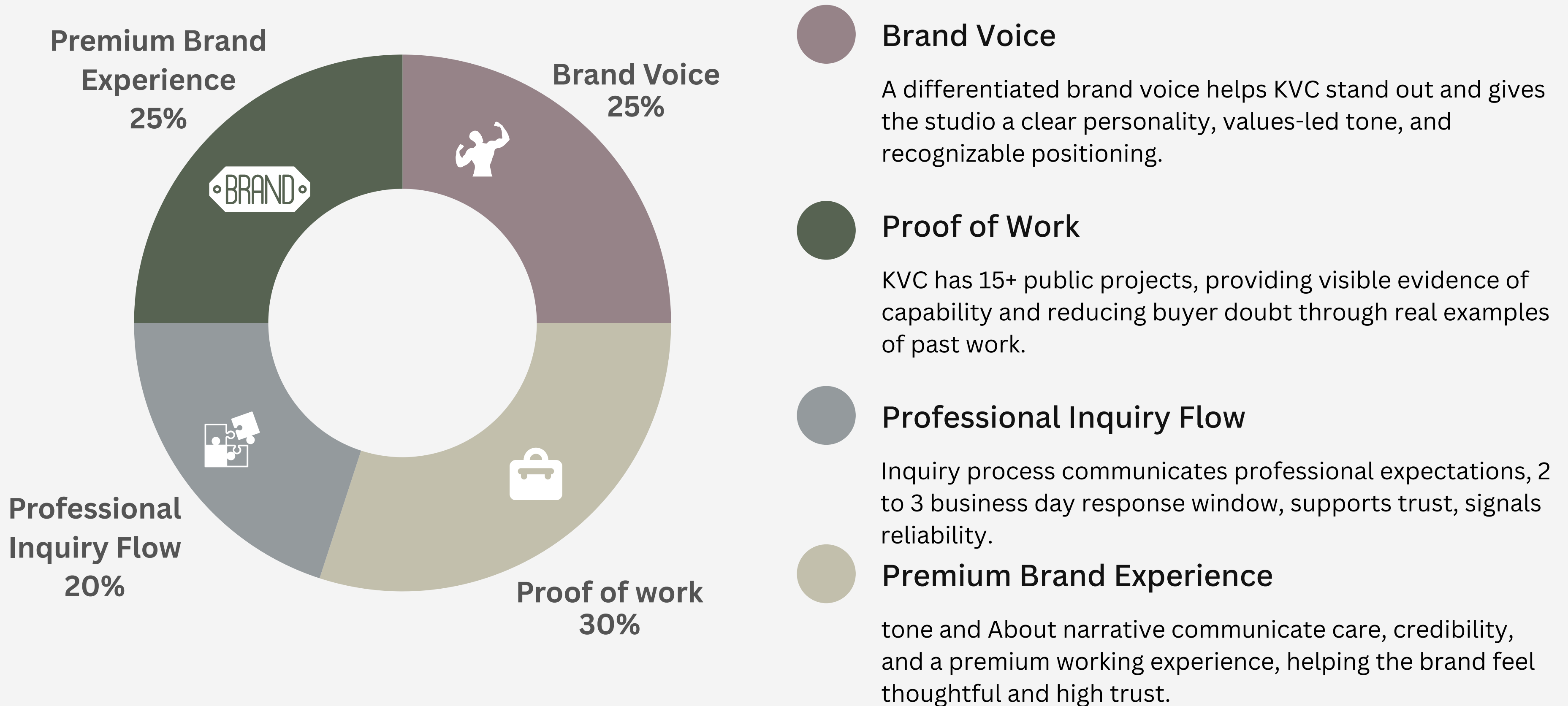
407 profile visits led to only 11 link taps. Interest exists, but pricing and offer clarity are not strong enough to move people forward.

4. TRUST WITHOUT CLARITY

The website and case studies build trust, but they do not yet give enough detail on scope, timeline, deliverables, and outcomes to help buyers self-qualify.



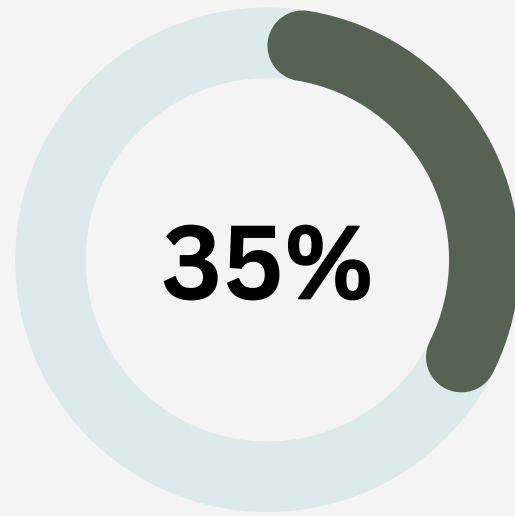
STRENGTHS



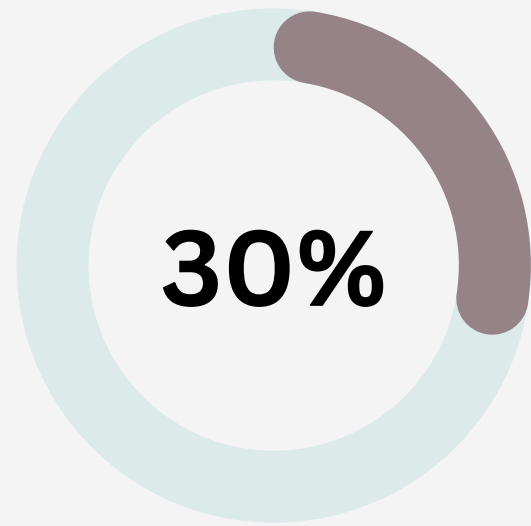
COMPETITOR ANALYSIS



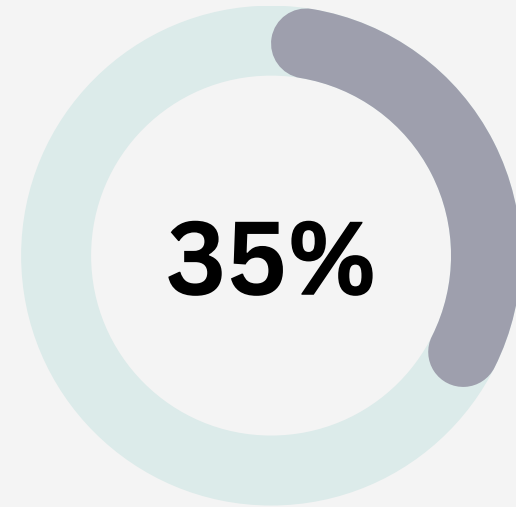
3 MAIN COMPETITORS



DIY and AI tools like Canva, Wix: Brands lower cost and speed up basic design execution.



Larger boutique or specialist firms: bring stronger packaging, more visible proof, and bigger teams.



Lower-cost freelancers: Offer faster, cheaper execution but less strategy and process rigor.



Accessible premium studio

KVC is well positioned in the \$3,500 to \$15,000+ range, balancing premium value with stronger accessibility than large agencies.



Core USP:

KVC's edge comes from 14+ years of experience, neurodivergent pattern recognition, cultural strategy, emotional intelligence, and mission aligned inquiry.



Ideal market space:

IKVC should sit in the premium, strategic, cultural, mission driven segment, not in the cheap/DIY or corporate/generic space.

WHAT SUCCESSFUL BOUTIQUE STUDIOS ARE DOING



Clear niche positioning:

Strong studios make audience fit obvious fast. KVC should repeat a simple promise across the website, bio, services page, and captions: strategy first, human led design for founders, nonprofits, and cultural brands.



Visible process and pricing logic:

Premium studios reduce friction by showing timelines, deliverables, milestones, and package paths. KVC's \$5,500 to \$12,000+ website pricing and \$8,500 to \$15,000+ brand + web offers need equally clear justification and inclusions.



Proof and content systems:

Leading studios use case studies, educational content, and repeatable offer posts, not random posting. A stronger system for KVC is 2 reels, 1 educational carousel, and 1 offer post weekly, with each project repurposed into a 6 post sequence.

WHAT SUCCESSFUL BOUTIQUE STUDIOS ARE DOING



Clear audience positioning

Bell & Whistle targets “small businesses with big dreams,” House of Gray speaks to buyers moving beyond DIY branding, and Focus Lab clearly positions itself for high-growth, premium brand clients.



Distinct package paths

Bell & Whistle separates branding, website, and combined offers
House of Gray defines Identity Essentials as a structured identity package
Focus Lab uses a premium, clearly bounded engagement model.



Process Transparency

House of Gray shows timelines and consultation structure
Bell & Whistle makes service paths visible
Focus Lab makes scope, budget, and fit expectations explicit early.



Higher Buyer Confidence

All 3 reduce friction by making audience fit, package logic, expectations, and next steps clear before inquiry.

STRATEGIC OBJECTIVE AND CURRENT BASELINE

House of Gray Studio



Scale

1.5K+ followers, with positioning that feels memorable and easy to understand.



Strength

Clear service structure, offers, timelines, and language that reduce buyer uncertainty.



Why it matters?

Shows that smaller studio does not need a huge audience to build trust and credibility.



Lesson

Focus on clearer offers and process clarity so buyers quickly understand what Kathy does and what happens next.

Bell & Whistle Design Studio

Scale

7,267 followers, with stronger conversion focused positioning.



Strength

Uses direct language for branding & websites that convert, making outcomes explicit.



Why it matters?

Shows how clearer messaging move viewers from interest to action/inquiry.



Lesson

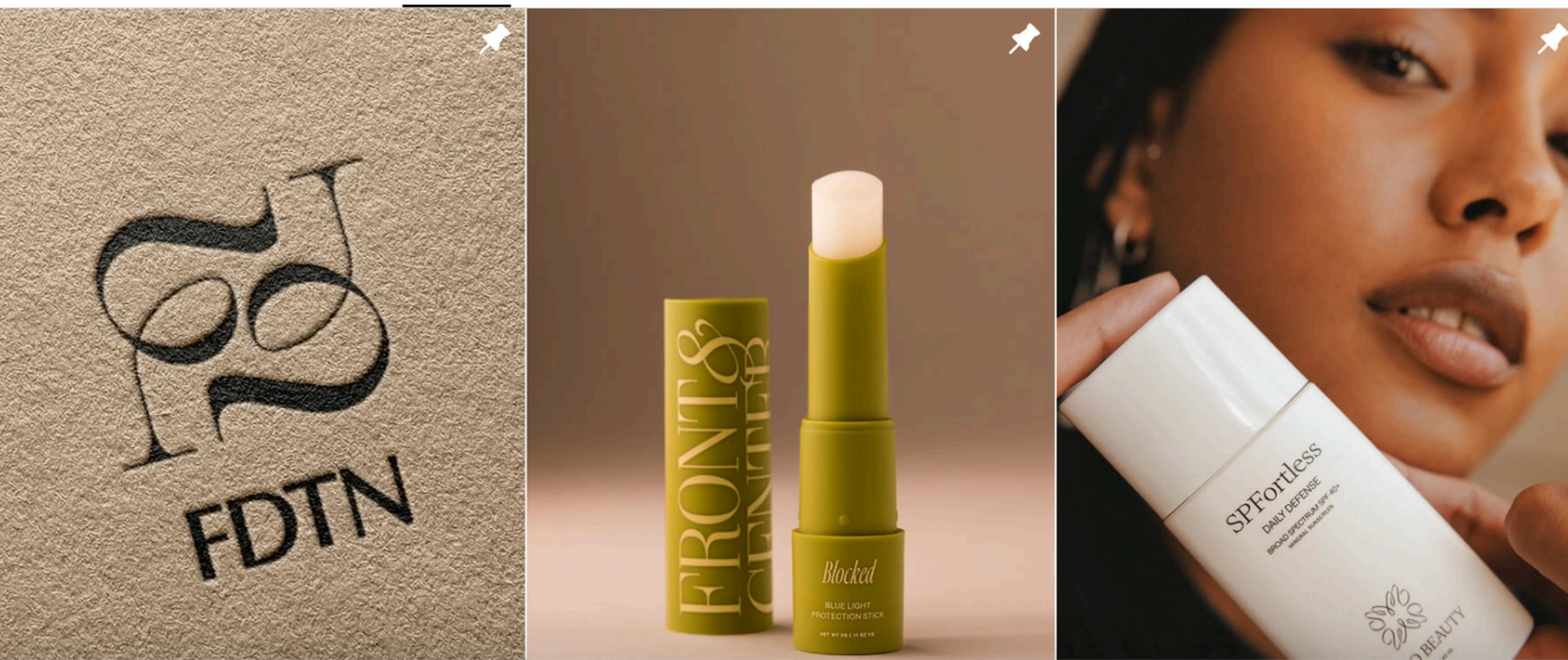
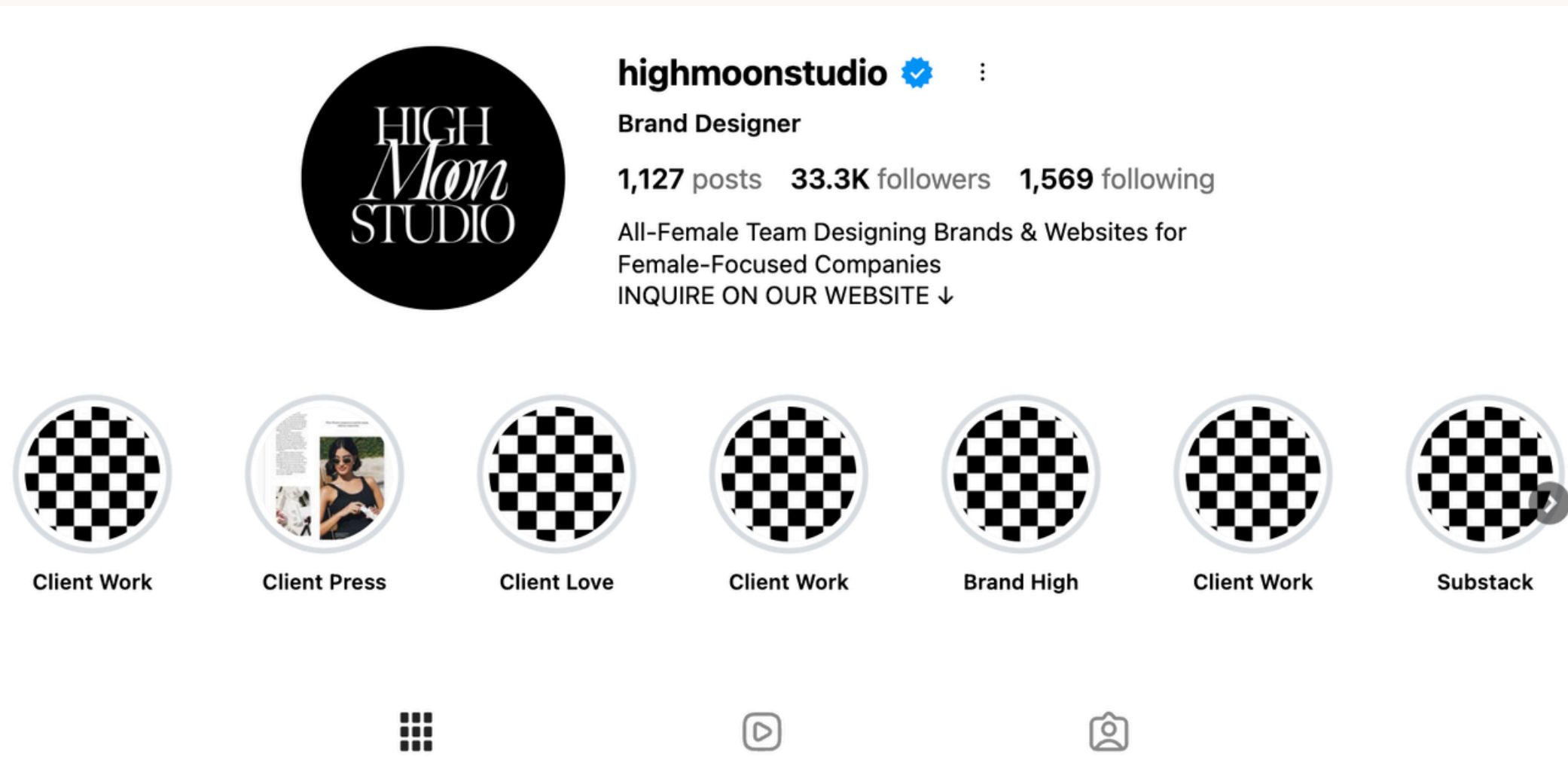
Say less “look at my style” and more “here is how clarity, trust, and cultural alignment help your business get chosen.”



COMPARE AGAINST 2 BIGGER STRATEGIC MODELS

| Factor | Focus Lab | Lean Labs | KVC |
|------------------------|---|---|--|
| Model | High-end brand agency | Growth / performance agency | Accessible premium boutique studio |
| Core promise | Elite strategic brand design | Websites that drive ROI and growth | Mission-aligned, human-led design |
| Typical clients | Startups, enterprise, venture-backed brands | Growth-focused businesses | Founders, nonprofits, cultural brands |
| Pricing / proof | Branding starts at \$30K+ ; enterprise rebrands \$100K–\$350K ; retainer \$3.5K/mo | Results-led proof: 271% conversion growth, 212% SQL growth, 500% traffic growth, 700% lead conversion, 100+ HubSpot builds | Typically \$3.5K–\$15K+ with cultural strategy and relational process |
| KVC takeaway | Do not compete on scale or prestige pricing | Do not compete as a pure performance agency | Own premium, strategic, cultural, mission-driven space |

COMPETITOR BENCHMARKS AND WHAT TO ADOPT

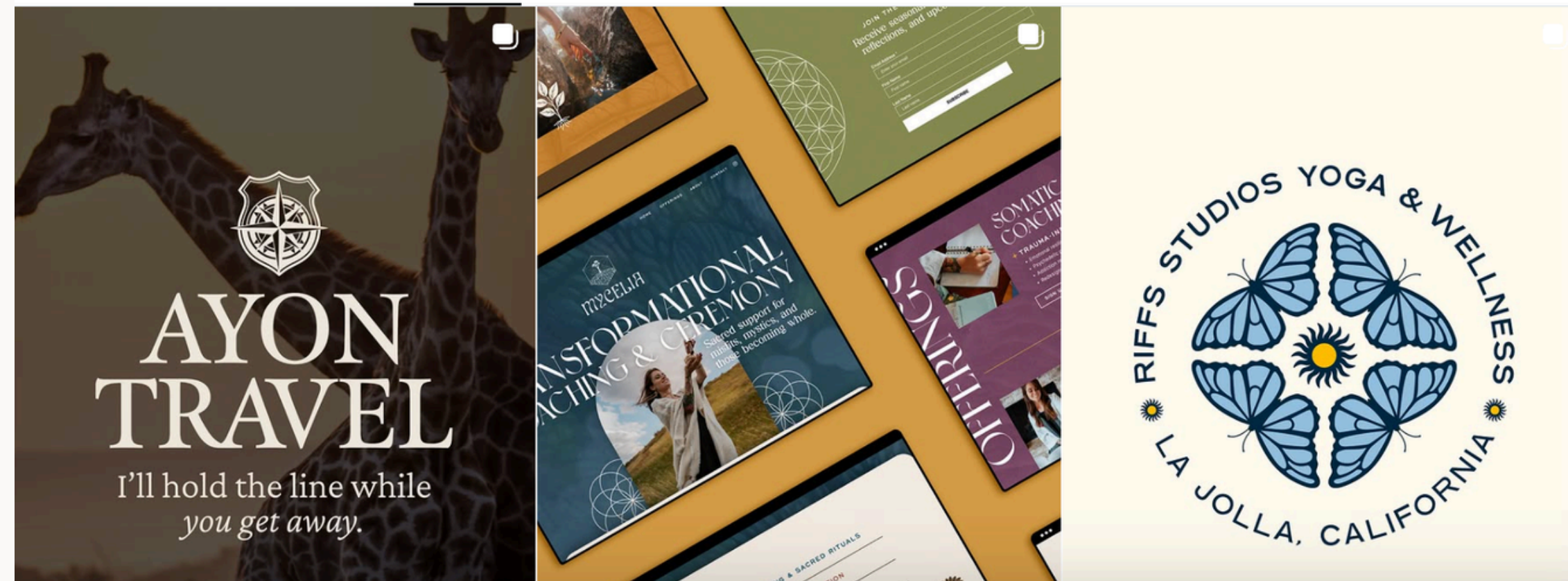
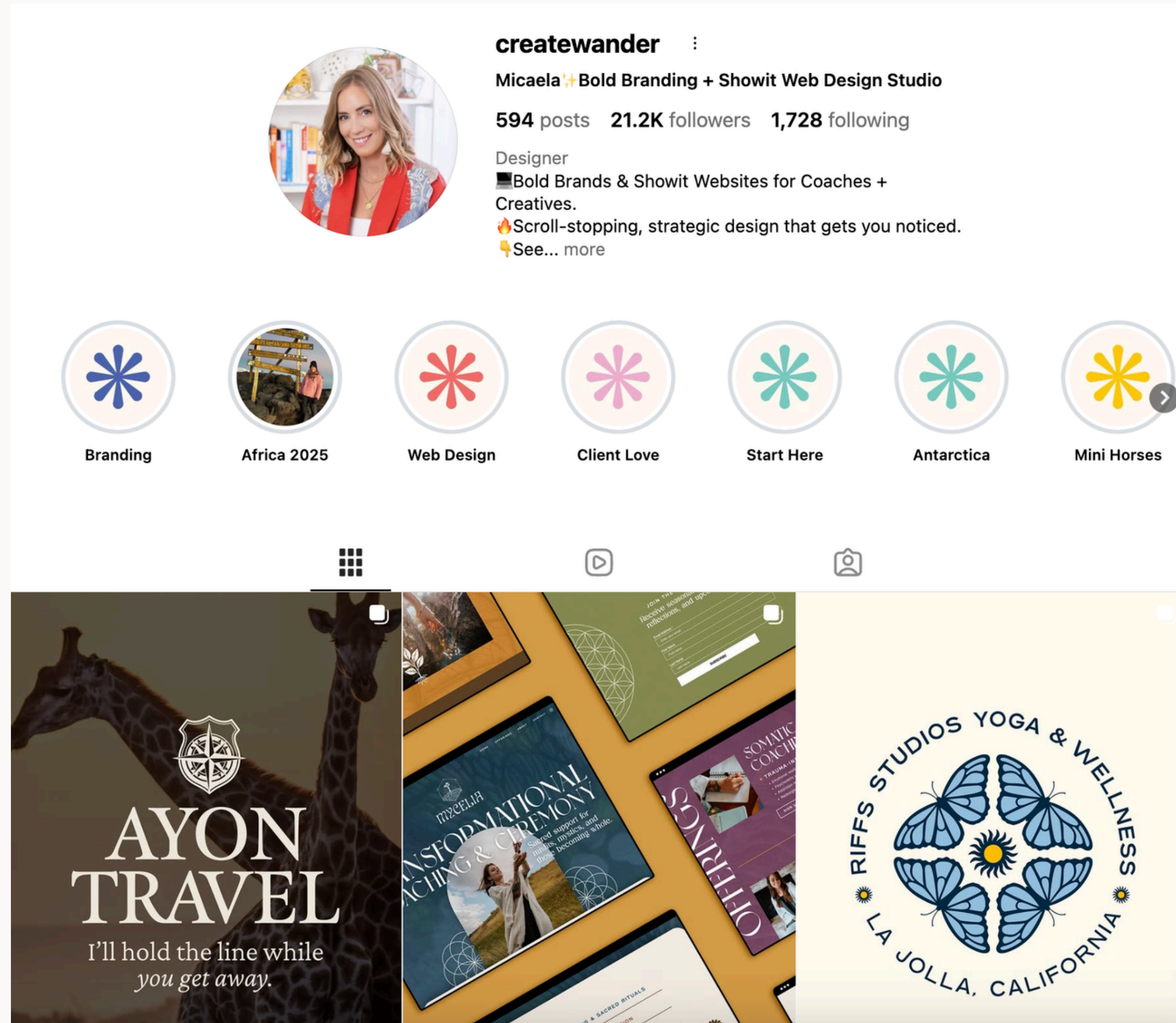


- **What works:** long term consistency, high post volume trains the algorithm and creates more discovery chances
- **Buyer clarity:** packages and services catalogue, prospects can self qualify before inquiry
- **Trust:** clear step by step process, request quote, discovery call, proposal and timeline, contract
- **What Kathy should adopt:** copy the structure, add a services guide with packages, starting ranges, typical timelines, add a 5 to 7 step How We Work section, mention catalogue access in IG bio

COMPETITOR BENCHMARKS AND WHAT TO ADOPT



- **What works:** niche is understandable in 3 seconds, clear who it is for, bold brands and Showit websites for specific entrepreneurs
- **Education engine:** simple teaching posts drive saves and shares, increasing reach
- **Content volume:** many entry points for recommendations and discovery
- **What Kathy should adopt:** use 1 niche sentence everywhere, bio, captions, on screen text, headline, post 1 educational carousel weekly



COMPETITOR BENCHMARKS AND WHAT TO ADOPT

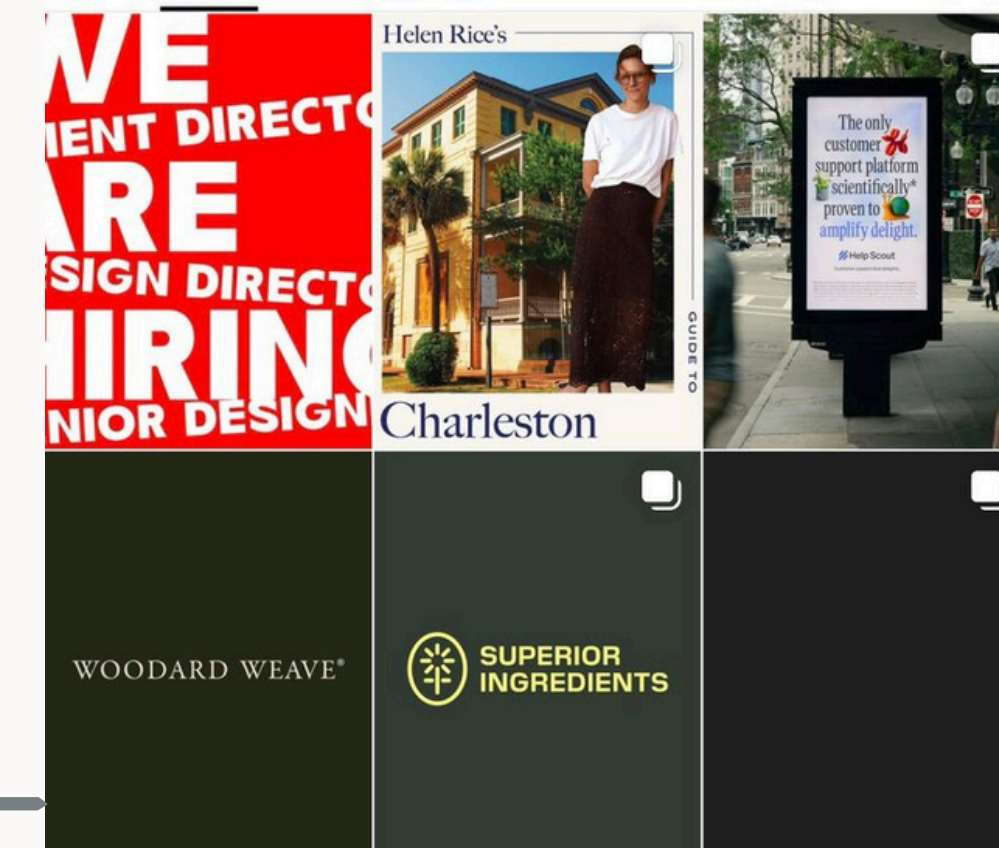
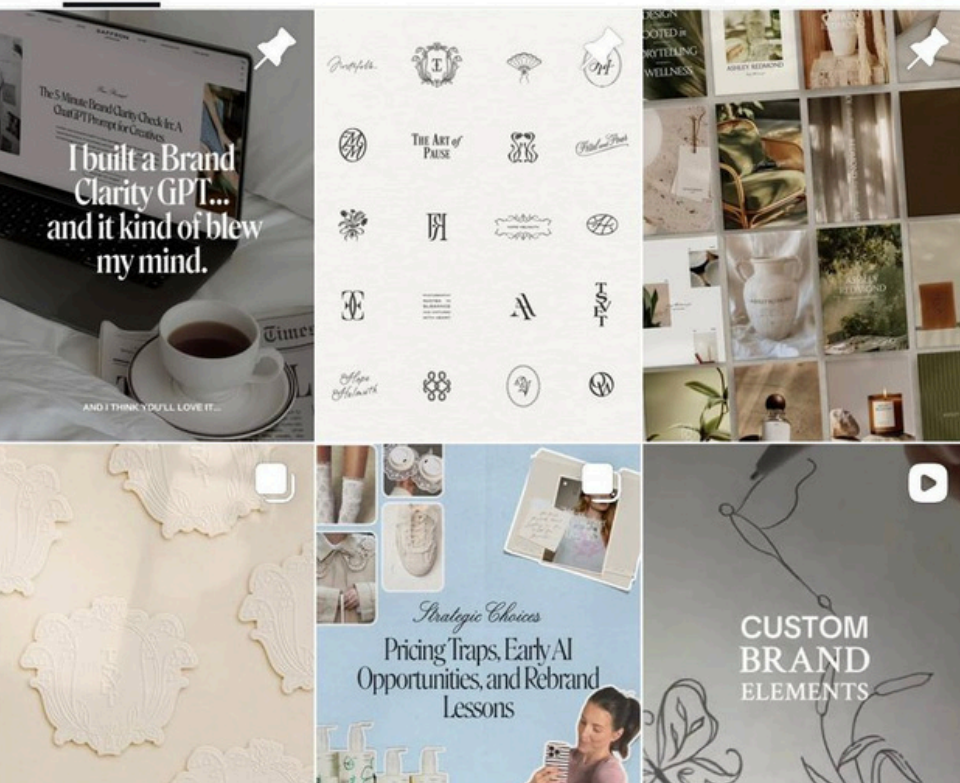
Instagram profile for saffronavenue, owned by Angela Mondloch. The profile shows 2,982 posts, 41.2K followers, and 2,303 following. The bio identifies her as a Graphic Designer and lists services like Brand & Showit Website Designer. The grid features various design-related posts such as 'MOCK-UPS!', 'NEW WORK', and 'BED MAKE.'.

- **High volume**, consistent posting helps account discovery.
- **Bio** makes niche and offer clear
- **Repeatable formats** drive saves and shares: tips, templates, before and after, education.
- **Adopt a weekly funnel mix:** 1 process reel, 1 before and after, 1 educational carousel, 1 offer post with timeline and starting range, plus repeat niche line "Culturally rooted brand and web design for mission driven founders."



Instagram profile for fuzzco, a consulting agency. The profile shows 3,472 posts, 40.5K followers, and 2,569 following. The bio describes them as a creative studio for brand, digital, and content. The grid includes posts for 'Previously', 'Foundry', and 'Font Builder'.

- **What works:** instantly recognizable and consistent
- **Save friendly posts:** strong visuals drive distribution
- **What Kathy should adopt:** post more systems, logo, palette, mockups, brand applied across website/social
- **System reveal carousel format:** brand name and outcome, problem, direction, key elements, final applications, CTA



PRICING ANALYSIS



SPONSOR PRICING VS MARKET BENCHMARKS

| OFFER | SPONSOR PRICE | MARKET BENCHMARKS | IMPLICATION FOR SPONSOR |
|-----------------------------------|-------------------|---|--|
| Brand Identity Development | \$3,500–\$6,500+ | \$1,000+ (starter tiers, Summerfield), \$4,000+ (Sonrisa) | Priced in mid-tier. Strong fit for strategy, positioning, and full-identity system, not just logo. |
| Website Design | \$5,500–\$12,000+ | \$2,000–\$4,000, \$4,800+ | Above many “starting at” websites. Justify with deeper strategy, custom design, conversion focus, and launch support. |
| Identity + Website pack | \$8,500–\$15,000+ | Approx. \$8,800+ (\$4,000+ plus web \$4,800+) | Aligns with market when both brand and web are included. Clear inclusions and deliverables will reduce negotiation. |
| Starter Brand Kit | \$1,800 | \$1,000+ | Upper starter tier. Works best when it includes usable templates, clear rules, and quick application across touchpoints. |

SPONSOR PRICING VS MARKET BENCHMARKS

| | | | |
|--|--------------|--|--|
| Custom Creative Projects | \$800+ | Often “project based” and not always published | Good floor for mini projects. Define examples like 1 pager, deck, templates, campaign kit to make scope obvious. |
| Monthly Creative Support Retainer | \$500+/month | \$475+ (Summerfield), \$650+ (Sonrisa), higher tiers rise with hours | Competitive entry retainer. Add clear hours, turnaround. |
| Photography | \$800+ | Depends on scope/usage | Reasonable starting point. Clarify session length, deliverables, and usage rights to avoid scope creep. |
| Art Direction | \$1,000+ | Often bundled, or priced like consulting | Fits as a premium add on if it includes concept, shot list, styling guidance, creative decisions. |
| Consulting or Brand Strategy | \$250/hour | \$250/hour | Market aligned for senior strategy and direction. |

REVISED SERVICE MENU AND PACKAGES



SOCIAL MEDIA PLAN

&

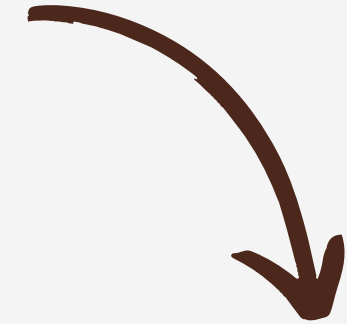
RECOMMENDATIONS



*Trust, credibility, funding
readiness, stakeholder clarity*



**Mission Driven
Leaders**



Instagram strategy should use a 3 lane funnel to support Kathy's \$96,000 revenue goal.



Keep content focused by speaking to 3 key buyer groups in ways that match what each one values most.

3 LANE FUNNEL

**Established
Small Businesses**

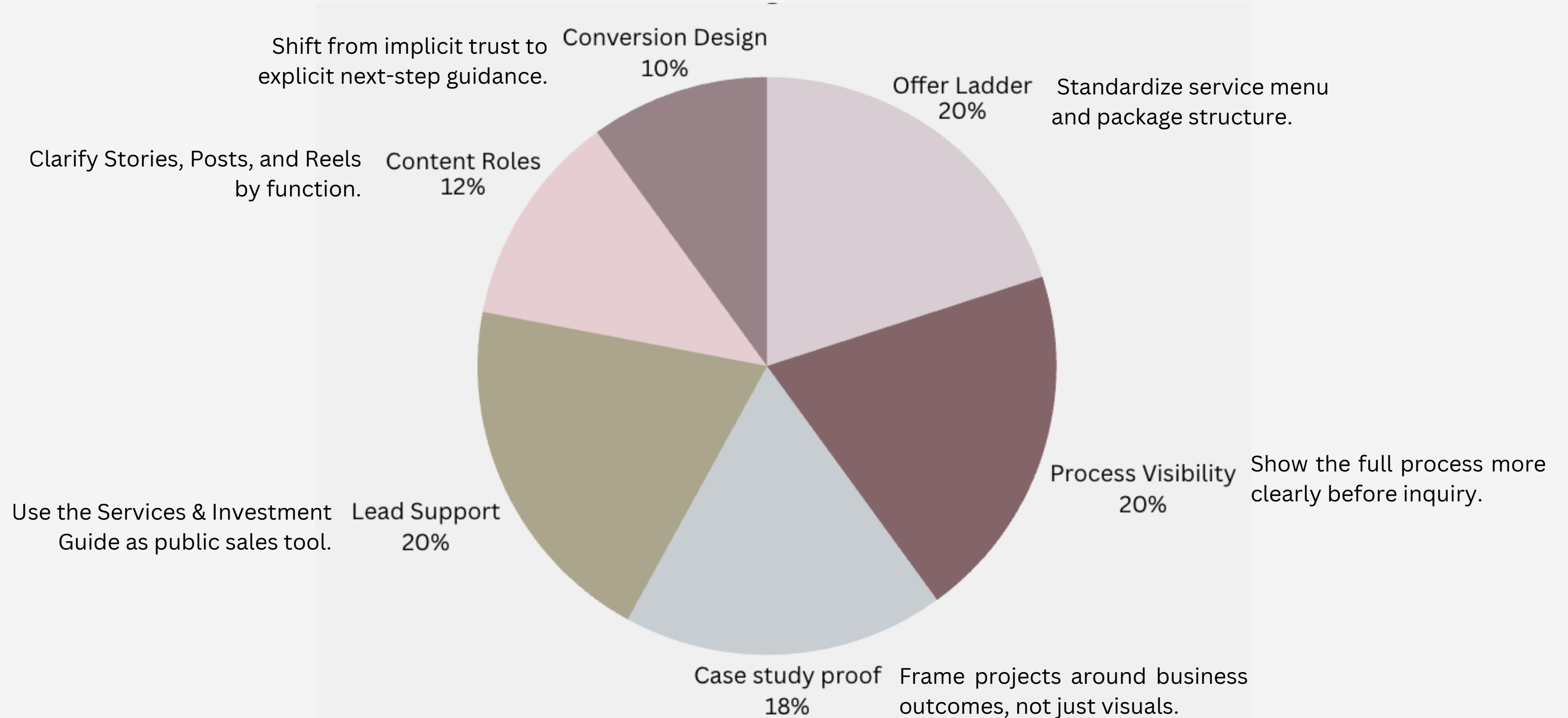
**Cultural
Creatives**

*Authenticity, identity, cultural
lens, meaningful design*



*Conversion, structure,
professionalism, service clarity*

PATH TO SCALING



Scaling requires a shift from aesthetic display to strategic education, clearer conversion design, and a more structured path from visibility to inquiry.

STRATEGIC OBJECTIVE AND CURRENT BASELINE

01

What the Plan Must Improve

- improve 4 areas: non follower reach, profile visits
- link actions and inquiries, and inquiry quality.

02

What Instagram Content Must Do

- make studio instantly understandable to cold viewers,
- turn design process into visible proof of value,
- create a path from attention to inquiry.

03

Current Channel Problem

Instagram is working more as relationship maintenance channel than strong discovery and conversion channel.

04

Core Conversion Gap

407 profile visits resulted in only 11 external link taps

NOW

TARGET



Followers: 770



1,200



Interactions: 368



500



Link clicks: 11



50



Engaged: 181



300



Profile visits: 407



700



Reached: 2,556



5,000

STRATEGIC OBJECTIVE AND CURRENT BASELINE



Clarity & Positioning

Buyer language: clarity, credibility, confidence, conversion

01

Process & Decisions

Process reels, screen recordings, moodboard to final, key design choices

02

Proof & Case Studies

Portfolio turned into business stories: before, after, key changes

03

Culture & Story

Cultural lens, founder story, human led design that builds trust

04

Offers & Conversion

What Kathy sells, who it is for, inclusions, timeline, pricing, next step

05

Discovery: Help non followers understand Kathy's work

Proof: Show experience and strategic thinking clearly

Process: Reduce fear by showing how work happens

Offer: Show what to buy and start

LANE SPECIFIC PACKAGE APPLICATIONS



AVOID SCOPE CREEP

CUSTOMER CREATIVE PROJECTS

Specify clear deliverables like pitch decks, 1 pagers, campaign kits, launch graphics, and social templates.



PHOTOGRAPHY

Define session length, deliverables, and usage rights before booking.



ART DIRECTION

Clarify whether service includes concepting, shot list, styling guidance, and review.



CONSULTING

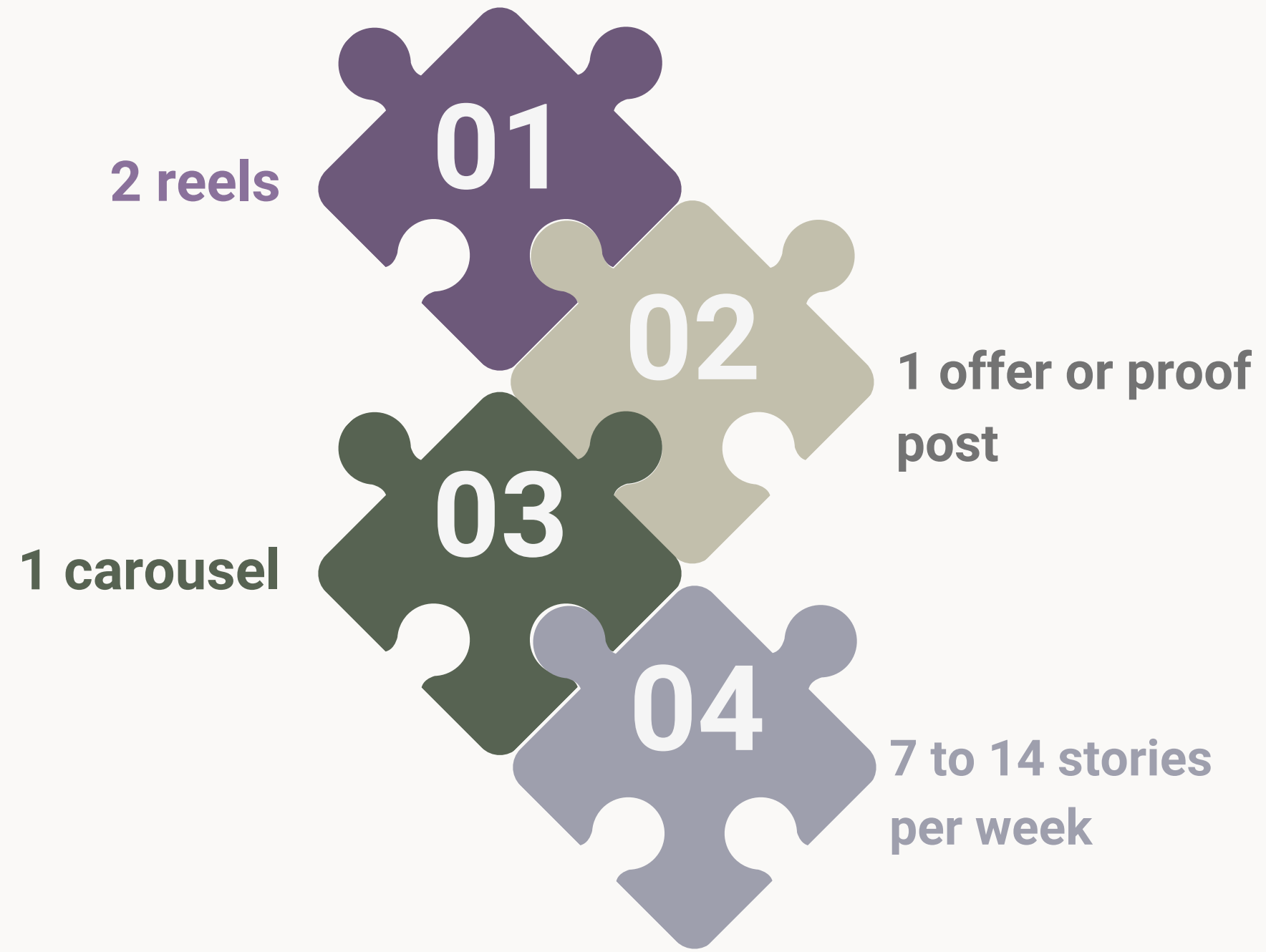
Business processes should have clear objectives, be as detailed as possible.



POSTING RHYTHM & 90-DAY PLAN

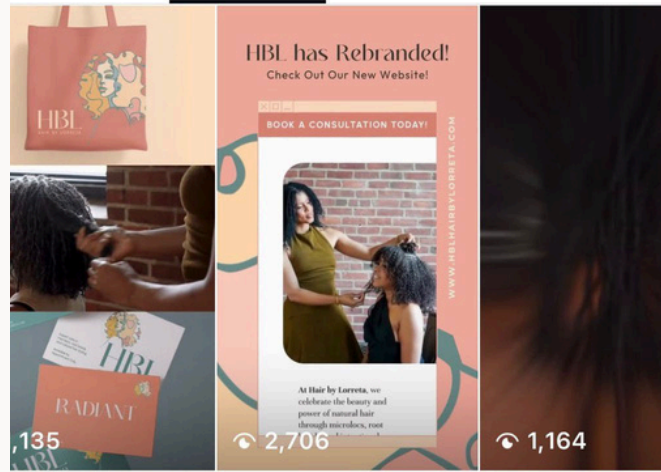


WEEKLY PLAN



| | |
|-----------------|-------------------------------------|
| Monday | Educational carousel |
| Tuesday | Process or decision-making reel |
| Thursday | Before-and-after or case study reel |
| Friday | Offer post or deliverables post |

WEEKLY PLAN



PROCESS REELS

Show how Kathy thinks and works through screen recordings, moodboard-to-final reveals, voiceovers on key design choices, and typography, color, or layout breakdowns.



TRANSFORMATION REELS

Highlight visible client change through before-and-after brand reveals, website redesigns, logo evolution, and client reset or launch moments.



EDUCATIONAL CAROUSELS

Build authority and drive saves and shares with posts on brand clarity, premium brand guide components, what clients pay for in brand design, and brand readiness.



SYSTEM REVEAL CAROUSELS

Present each project as a strategic business story by showing the client or brand name, business problem, strategic direction, key visual elements, final applications, and CTA.



OFFER AND DELIVERABLES POSTS

Each offer post clearly state who it is for, what is included, typical timeline and starting range. Tell viewers exactly how to inquire or take the next step.

PHASE 1: DAYS 1 TO 30 - THE BLACK BOX RESET

Make the studio easier to understand, make the process visible, and establish a premium pricing baseline.

WEEK 1 | INTRODUCE RELATIONAL STRATEGY

- Hook: Why your brand feels off even if the logo is pretty.
- Founder intro reel, neurodivergent pattern-recognition reel, educational carousel on what Kathy does, and a simple entry-offer post. Builds quick clarity around Kathy's differentiation.

WEEK 3 | PRICING & VALUE TRANSPARENCY

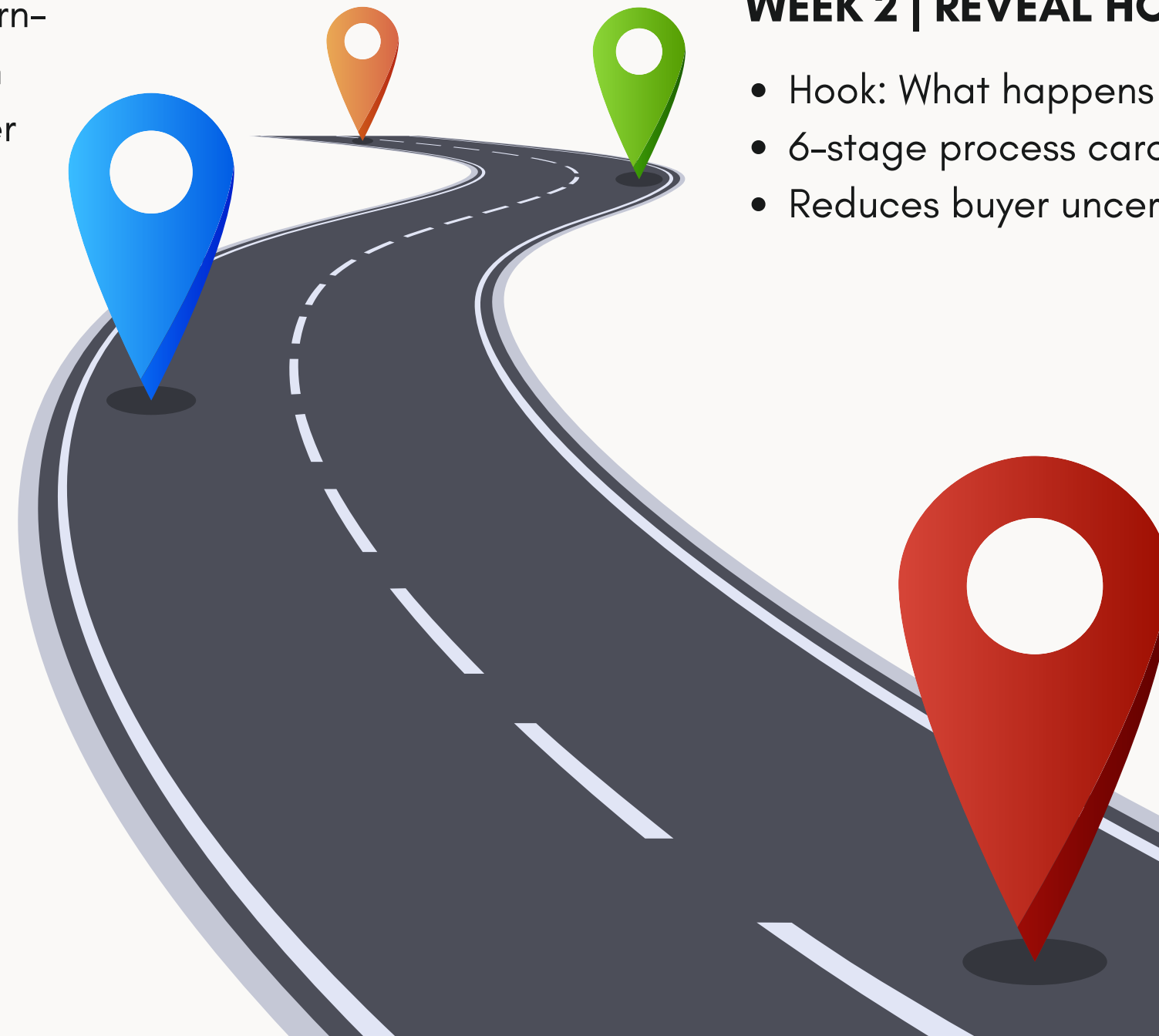
- Hook: Why we don't just sell logos, and what \$3,500 actually buys you.
- Service ladder, premium brand guide carousel, and offer post.
- Sets expectations and filters out low-fit inquiries earlier.

WEEK 2 | REVEAL HOW WE WORK

- Hook: What happens inside a 6-week KVC transformation?
- 6-stage process carousel, process reel, and behind-the-scenes stories.
- Reduces buyer uncertainty by making the service process visible.

WEEK 4 | SIGNATURE CASE STUDY

- Hook: From scattered to strategic: How Yvette professionalized her advisory.
- Transformation reel, strategy carousel, design breakdown, and offer content.
- Turns portfolio work into business proof and conversion content.



PHASE 2: DAYS 31 TO 60 - THE AUTHORITY ENGINE

Deepen differentiation, make Kathy's expertise more legible, and strengthen trust through story, strategy, and proof.

FOUNDER STORY & CULTURAL STRATEGY

- Hook: Design is the bridge between culture and opportunity.
- Founder reel sharing Kathy's Cabo Verdean immigrant story, plus story sequences connecting lived experience to brand strategy. Deepens differentiation without making the feed overly personal.

CLIENT VOICE & TRUST PROOF

- Hook: What it feels like to finally have a brand that matches your vision.
- Video testimonial if available, or a transformation post paired with a strong client quote. Builds trust through proof that premium buyers respond to.

DECISION-BASED STORYTELLING

- Hook: I chose this font for a reason, and it wasn't aesthetics.
- Deep-dive reel into 1 design decision, paired with a carousel on what clients are really paying for in branding.
- Makes Kathy's design expertise visible and easier to understand.



PHASE 3: DAYS 61 TO 90 - THE CONVERSION SPRINT

Turn authority into action by improving inquiry readiness, creating urgency, and supporting higher-converting offers.

WEEK 9 | THE WEB THAT WORKS SERIES

- Hook: Design is the bridge between culture and opportunity.
- Founder reel sharing Kathy's Cabo Verdean immigrant story, plus story sequences connecting lived experience to brand strategy. Deepens differentiation without making the feed overly personal.

WEEK 11 | THE 1 SPOT LEFT CAMPAIGN

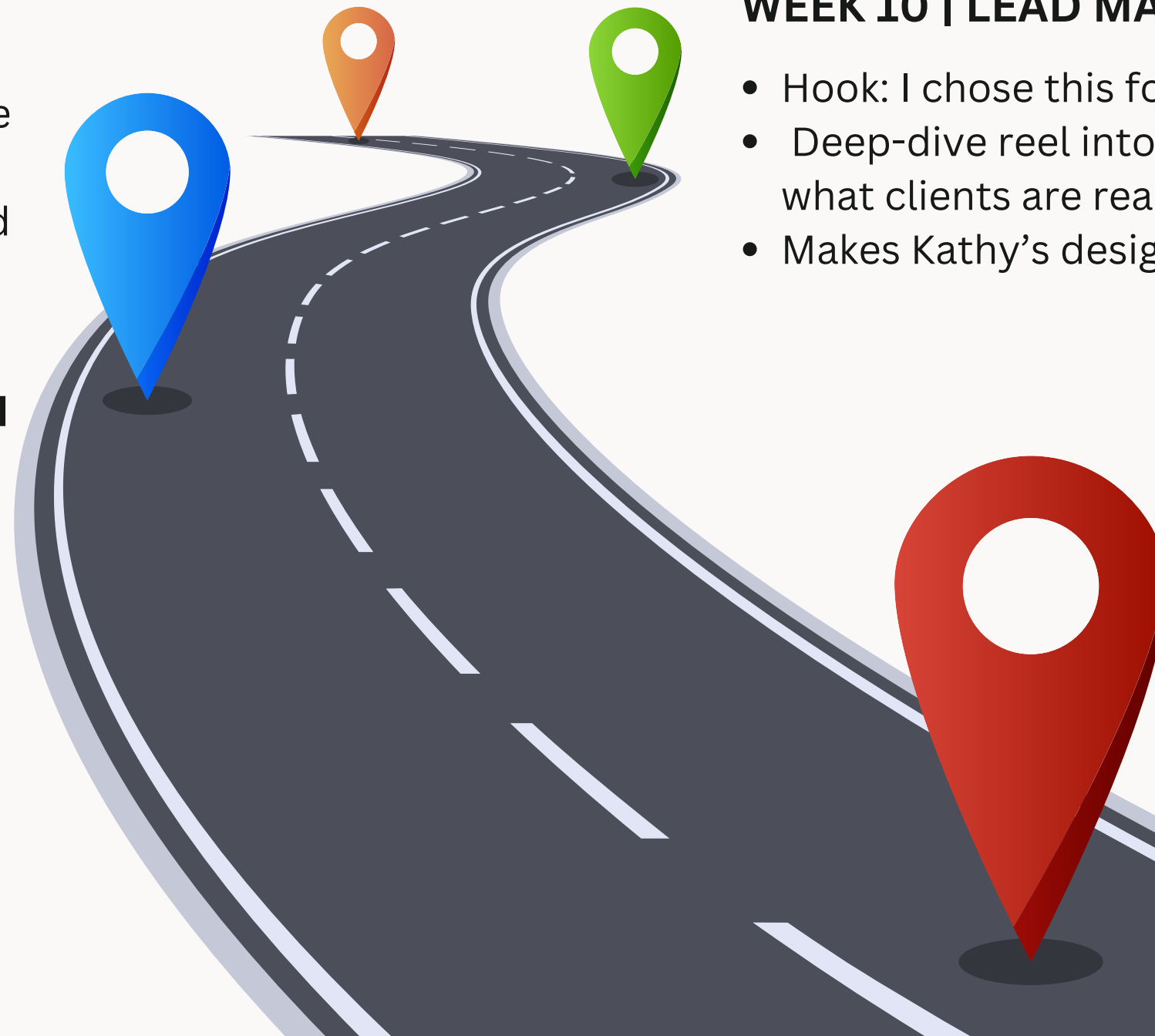
- Hook: What it feels like to have a brand that matches your vision.
- Video testimonial if available, or a transformation post paired with a strong client quote. Builds trust through proof that premium buyers respond to.

WEEK 10 | LEAD MAGNET LAUNCH

- Hook: I chose this font for a reason, and it wasn't aesthetics.
- Deep-dive reel into 1 design decision, paired with a carousel on what clients are really paying for in branding.
- Makes Kathy's design expertise visible and easier to understand.

WEEK 12 | RETAINER & RELATIONSHIP

- Hook: What it's like to have a creative partner in your pocket?
- Introduce \$1,500/month retainer for past clients through a proof reel, FAQ stories, and a "start here" post.
- Supports recurring revenue



PROFILE OPTIMIZATION CHECKLIST

Live
creatively



Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s.

Creative Collective

PINNED POSTS

- Use 3 pinned posts to explain the brand quickly: founder story, service menu with starting price, and a flagship case study.
- Together, they should clarify who Kathy is, what she offers, and the value of her work.

Instagram SEO & Keywords

- Use keyword-rich profile and content language to improve discoverability and search visibility.
- Core terms should reflect Kathy's niche, services, audience, and location if relevant.

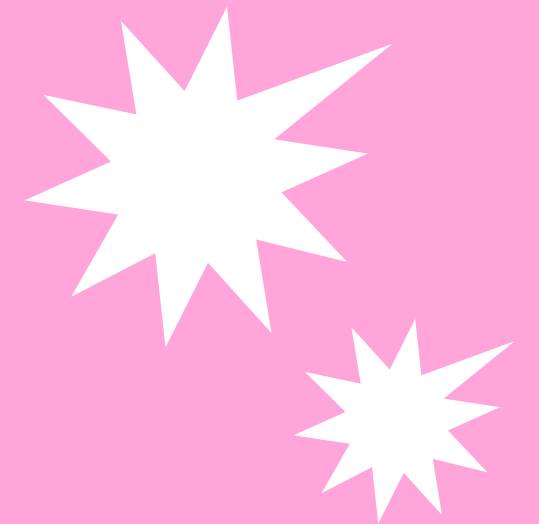
Low-Friction CTAs

- Use softer CTAs for early-stage viewers, such as downloading the guide, taking the readiness check, saving, or sharing.
- These help move interested viewers closer to inquiry without asking for immediate commitment.

High-Intent CTAs

- Use stronger CTAs for conversion-ready viewers, such as booking a discovery call or inquiring about a package.
- These should guide warm leads toward direct action and the next buying step.

Creative Collective



Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s.

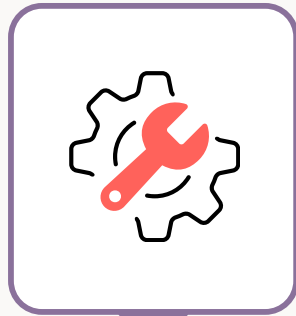
THE REPURPOSING LOOP



Turn each project into 6 assets: before-after reel, strategy carousel, design-detail reel, story sequence, deliverables post, and CTA post



Use a consistent niche line: "Culturally rooted brand and web design for mission-driven founders."



Make the buying journey clearer across the account: bio, highlights, CTA language, stories, and inquiry path should all guide viewers to the next step



End with a strong action prompt such as: Book a 15-minute call

TOP 5 HIGH-IMPACT INSTAGRAM POST IDEAS

- What I actually do as a culturally rooted brand designer
- 3 signs your brand is unclear
- Before-and-after logo, site, or identity reveal
- What clients are really paying for in branding
- Homepage mistakes that lose inquiries

HOW SUCCESS SHOULD BE MEASURED

ENGAGEMENT & REACH

Follower growth, interactions, engaged accounts, reach, reels watch time, saves, and shares to measure visibility and content resonance.

PROFILE ACTIONS

Profile visits, link clicks, and profile-to-inquiry conversion to measure movement from attention to action, with a target of 20%+ improvement.

INQUIRY QUALITY

Fewer low-fit, low-budget messages and more package-aligned inquiries that reflect ideal clients and offer structure.

SALES CYCLE QUALITY

Prospects should arrive at discovery calls already understanding the process, timeline, and pricing, showing stronger pre-qualification.

REPURPOSING SYSTEM & WHAT BECOMES MEASURABLE



Turn every client project into 6 posts, not 1

Reel 1: Before and after transformation

- Carousel: Client problem → decisions → outcome

Reel 2: One key design choice explained

- Deliverables Post: What was included + scope clarity
- Story Sequence: Poll + Q&A + behind the scenes
- Offer Post: “If you want this outcome, start here” + timeline + starting range

Why: Volume without randomness. Systems create consistency.



What becomes measurable (30 to 60 days)

- Website Metrics - Conversion rate (visits → inquiry), Inquiry quality rate (% aligned leads)
- Instagram Metrics - Reels watch time, Saves & shares, Profile actions (visits, link taps)
- Business Metrics - Package mix, Sales efficiency (time per closed project), Email list growth

INSTAGRAM BUYER PATH OPTIMIZATION



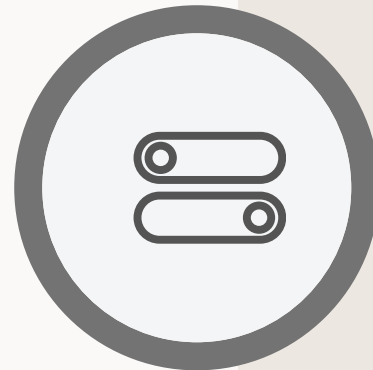
1. PROFILE IDENTITY & CONTACTS

Use a buyer-facing name, relevant category label, and visible contact details to make the account easier to understand and easier to act on.



2. BIO POSITIONING

Answer 3 questions fast: who it is for, what outcome it creates, proof of credibility, and the next step through a clear CTA.



3. LINK-IN-BIO ARCHITECTURE

Guide traffic in order: Services & Investment Guide, Discovery Call, Readiness Check, Portfolio, then Website Home.



4. HIGHLIGHTS AS CONVERSION NAVIGATION

Organize highlights into conversion steps: Start Here, Services, Process, Work, Results, Reviews, About, and FAQ.

CONTENT PRODUCTION TOOLKIT

THE C.A.S.E. CAPTION MODEL

C = Connection: Start with the hook, pain point, or tension.

A = Authority: Explain the “why” through Kathy’s perspective and expertise.

S = Solution: Share a quick win, useful insight, or behind-the-scenes explanation.

E = Engagement / Entry: End with a clear next step or CTA.



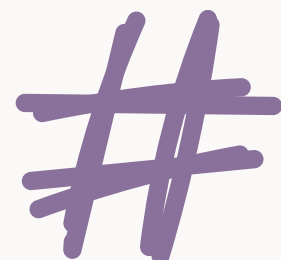
HOOK LIBRARY BY CONTENT TYPE

Discovery: Clarify brand problems, website gaps, and premium positioning.

Offer: Frame current ways to work together, offer entry points, and explain pricing value.

Process: Show design decisions, transformation stages, and how the work happens.

Proof: Highlight before-and-after change, package value, and client results.



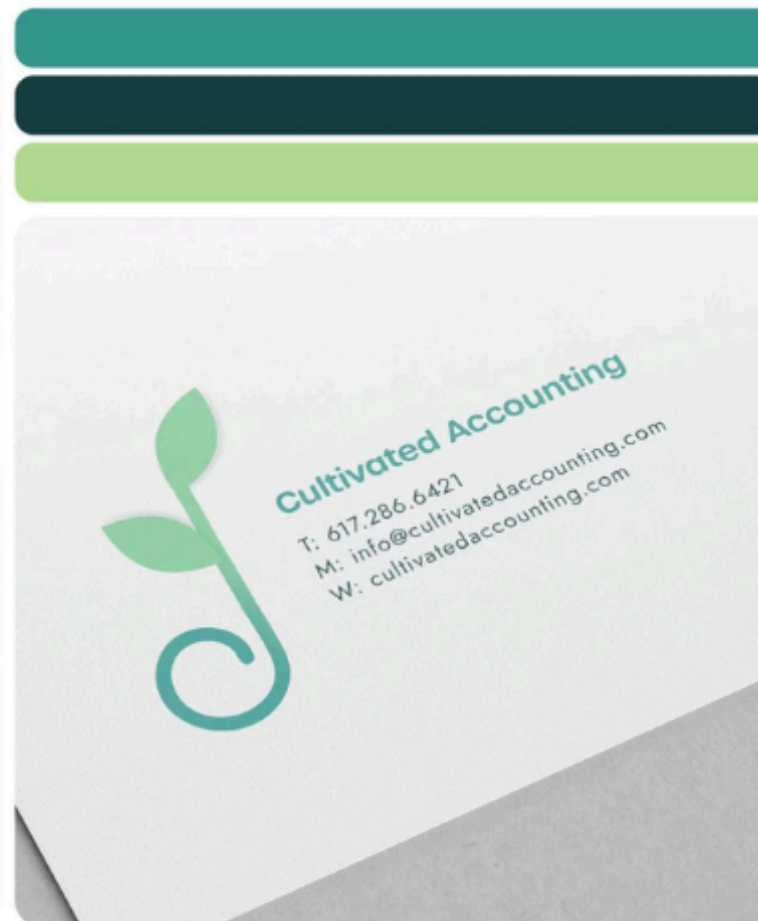
We created 3 different hashtag categories tailored to Kathy’s Instagram content and buyer intent, and the full hashtag sets can be found in the report.

Cultivated Accounting Case Study Review



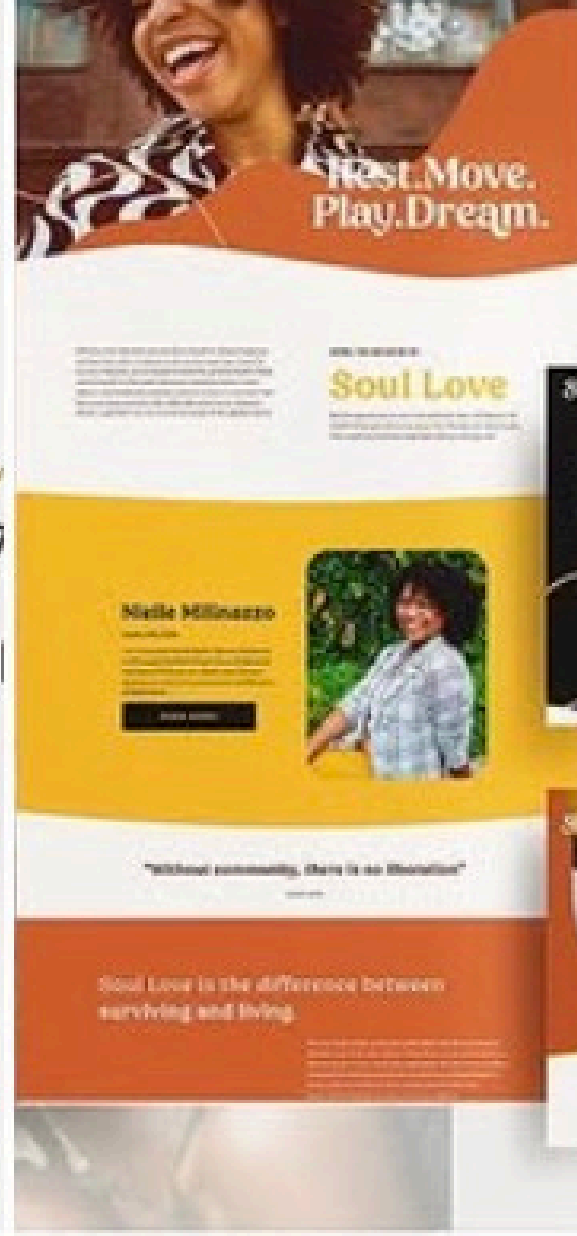
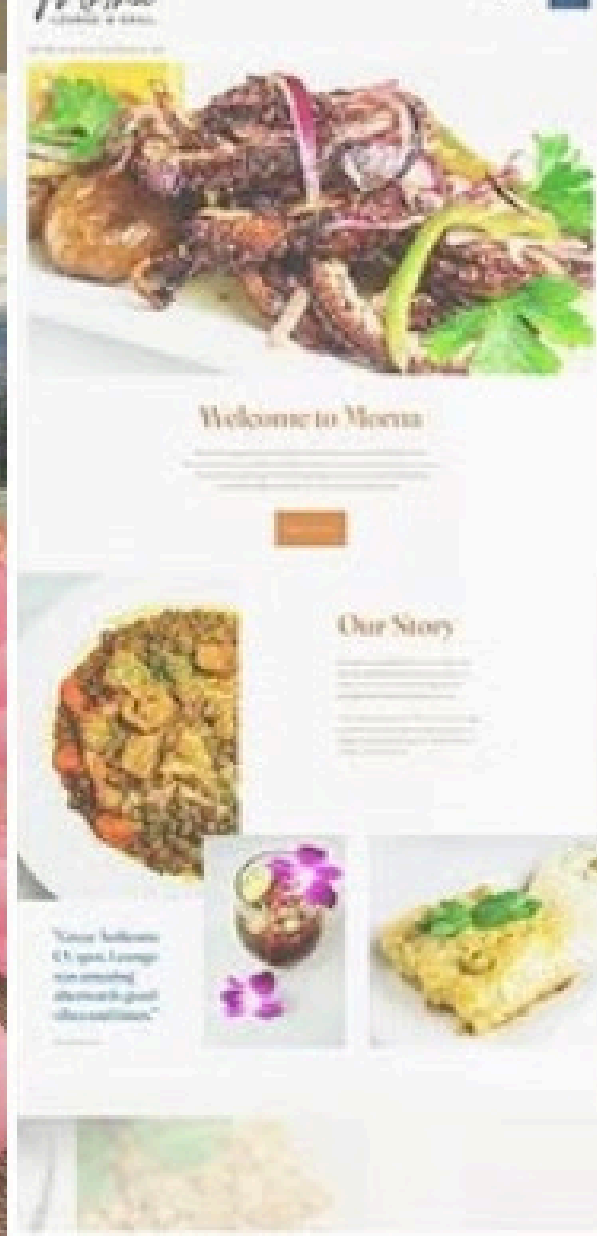
What the page communicates well

- Clear niche and positioning: values led financial advisory with “growth and care” concept
- Clear client and scope
- Strong credibility signal
- Concept is easy to recall: gardening metaphor ties cleanly to financial clarity and long term growth



What is missing

- No challenge and goals section
- Missing project details buyers expect: timeline, identity inclusions, website inclusions (pages, platform, SEO basics, handoff)
- No outcomes or proof points, even safe metrics



"Imagination makes it beautiful. Right Strategy makes it billable." :)

~ Team 3

A top-down view of a desk with various items: a laptop, a cup of coffee, a pen, glasses, paper clips, and a plant. The items are arranged in a way that suggests a workspace. The text "THANK YOU" is centered on the desk.

THANK YOU