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Scale What Matters: A Practical Guide for B2C Product-Tech Brands

A digital-first playbook to decide **what to build next** across brand, website/PDPs, social/ads, and product UI/UX based on where you are right now.

How to use this guide

1. **Self-assess** your stage using the quick checklist.
 2. Jump to the matching **Stage Playbook** for specific moves.
 3. Use the **decision trees** to pick the right website, PDP, social, ad, and sales asset strategies for your reality, not a generic blueprint.
 4. Run the **90-day plan**. Measure, iterate, move up a stage.
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Quick Stage Check

Tick what's true today:

- ☐ We're pre-launch or pre-PMF; we need proof of demand
- ☐ We have < 1,000 customers or MRR < target
- ☐ Most traffic comes from paid, conversion is inconsistent
- ☐ CAC is volatile and LTV is unclear
- ☐ We're growing, but CRO/retention is the bottleneck
- ☐ We're expanding into new markets/channels and need scale systems
- ☐ We're a category leader; growth = defense + expansion

Match your highest-priority truth to a stage:

- **Stage A — Validate** (pre-launch / pre-PMF)
- **Stage B — Launch** (first 500–1,000 customers)
- **Stage C — Traction** (repeatable acquisition + early retention)
- **Stage D — Scale** (multi-market, multi-channel, ops maturity)
- **Stage E — Lead** (category leadership + expansion)

Strategy Lens: Who really buys

Your buyer is **spec-driven, performance-curious, price-aware**. They want proof, not platitudes. We design the ecosystem to make the **advantages undeniable** long before checkout.

Decision Trees (Pick What Fits)

1) Website / PDP Format

Price & Consideration Matrix

- **<\$300 (impulse)**: One-page landing or lightweight PDP. Sticky CTA. Social proof above fold. Apple/Google Pay. 3-question quiz for fit.
- **\$300–\$1,500 (considered)**: Full PDP with comparison table, financing, reviews, spec table, explainer video, FAQ, returns, warranty. Exit intent offer.
- **\$1,500–\$5,000 (high-consideration)**: PDP + “Why Us” hub, demo scheduler, store/test-ride locator, downloadable spec sheet, financing calculator, insurance/maintenance info, photo gallery + UGC.
- **>\$5,000 (consultative)**: Product hub + guided flow: quiz → comparison → PDP → demo/quote. Add sales-assisted chat, pre-qualification, trade-in, concierge onboarding.

Traffic Reality Check

- **< 10k visits/mo**: Focused landing experiences, fast pages, 1–2 key CTAs, remove distractions.
- **10–50k**: CRO program (A/B weekly), heatmaps, session replays, form analytics.
- **> 50k**: Personalization by source/segment; server-side tagging; onsite quizzes and bundles.

2) Social & Community Strategy

If awareness is the problem: Short-form video first (TikTok, Reels, Shorts). Creator seeding, 3–5 hooks per claim, proof-led demos.

If trust is the problem: UGC reviews, teardown videos, durability tests, side-by-side comparisons, live Q&A, founder AMAs.

If conversion is the problem: Retargeting content: financing explainer, unboxing, setup in 5 steps, “who this is for/not for,” shipping & returns clarity.

If LTV/retention is the problem: Tips series, challenges, usage streaks, community highlights, referral prompts, roadmap updates.

3) Ads & Media Mix

- **Low budget (<\$20k/mo):** Meta + TikTok for creative testing; Google Search for high-intent; 70% prospecting / 30% retargeting.
- **Mid (\$20–100k/mo):** Add YouTube (TrueView/Discovery), Reddit (niche), Affiliate/Creator whitelisting. Weekly creative refresh, creative scorecard.
- **High (>\$100k/mo):** Add CTV/OTT, audio, out-of-home in key geos; run incrementality tests (geo-lift), MMM-lite quarterly.

Creative Pillars (rotate weekly):

1. **Performance** (speed, range, power)
2. **Practicality** (charge time, portability, maintenance)
3. **Proof** (reviews, lab tests, third-party comparisons)
4. **Prestige** (design, finish, ownership vibe)

4) App / Product UI/UX Focus

- **Onboarding:** 1-minute setup, default best settings, spec highlights surfaced as wins (“You just gained +22% range”).
- **Activation:** First-ride checklist, milestone badges, tutorials triggered by behavior.
- **Retention:** Smart alerts (maintenance, charge), seasonal modes, community leaderboards, refer-a-friend native.
- **Support:** In-app diagnostics, warranty status, self-serve returns, proactive comms when issues spike.

5) Sales Assets (D2C + Retail/Partners)

- **Spec Sheet:** One pager, printable + downloadable, QR to PDP.
- **Comparison Guide:** Honest side-by-side, use cases not just specs.
- **Explainer Video:** 30–60s; hero benefit + proof + CTA.
- **How-to / Unboxing:** Reduce returns; increase confidence.
- **Retail Sell-In Deck:** Narrative, proof points, velocity plan, merchandising.
- **Creator Toolkit:** B-roll, shot list, claims, legal.

Stage Playbooks

Stage A — Validate (Pre-launch / Pre-PMF)

Objective: Prove demand and message-market fit.

Brand

- Simple, sharp positioning: *Who it's for + key advantage in 7 words.*
- Visual identity v0.5: logo, color, type; avoid heavy systems.

Website / Landing

- One high-conviction landing page: headline → 3 benefits → spec teaser → social proof beta → email/waitlist → FAQ.
- “See it in action” 20–30s clip. No fluff.

Social & Ads

- 6–8 concept videos proving the core claim; seed with 20–50 micro-creators.
- Paid test: 10–20 creative variants; kill losers in 72 hours.

App / UX

- Clickable prototype; test onboarding comprehension (5-user tests weekly).

Sales Assets

- Teaser spec one-pager; early adopter offer; founder note.

Data Stack

- GA4 + server-side tagging plan, Meta/TikTok pixels, UTM discipline, Amplitude/Mixpanel for eventing, Looker/Databox for KPI board.

KPIs

- Landing CVR to waitlist 8–15%
- Thumb-stop rate > 25%, 3-sec view > 30%
- Email open > 45%, CTR > 5%

90-Day Plan

- Weeks 1–4: Message tests (headline/benefit/spec focus).
- Weeks 5–8: Price/offer tests (bundle, financing, guarantee).
- Weeks 9–12: Channel validation; prep Launch assets.

Stage B — Launch (First 500–1,000 Customers)

Objective: Build a reliable funnel from click → checkout.

Brand

- Lock a tagline that encodes the advantage. Create a 3-claim hierarchy: Performance, Practicality, Proof.

Website / PDP

- Above the fold: hero claim + proof stamp + price/financing + primary CTA + trust row.
- Mid: demo video, spec table, comparison table, reviews (with photos), sticky CTA.
- Bottom: FAQ, warranty/returns, shipping calculator, UGC gallery.

Social & Ads

- Content calendar: 3 posts/wk per channel (Proof Monday, Practicality Wednesday, Performance Friday).
- Paid: 60% prospecting (hook/testing), 40% retargeting (FAQ, financing, unboxing).
- Creator whitelisting for top 3 UGC ads.

App / UX

- Onboarding: celebrate the first “win” (e.g., first ride, first charge).
- Push: abandoned setup nudges; “spec unlocks.”

Sales Assets

- 60s overview video, spec sheet v1, comparison guide, install/unbox guide.

Data & Ops

- Daily KPI pulse: sessions, CTR, ATC rate, checkout CVR, CAC, ROAS, NPS.
- Post-purchase survey for attribution reality.

KPIs

- PDP CVR: 1.5–3% (<\$1.5k AOV) / 0.7–1.2% (>\$1.5k)
- CAC within 20–35% of AOV (starter target)
- Refund rate < 5%

90-Day Plan

- Month 1: Launch + retargeting ladder.
- Month 2: Offer/price tests, checkout friction removal.
- Month 3: Add creator/affiliate; scale winning creative.

Stage C — Traction (Repeatable Acquisition + Early Retention)

Objective: Lower CAC, raise LTV, stabilize growth loops.

Brand

- Build distinctive memory structures: sound/logo lockup, product silhouette, finish.

Website / PDP

- CRO program: 2–3 tests/week (hero claim, price framing, reviews placement).
- Personalize by source: spec-first experience for ad traffic; story-first for PR/organic.

Social & Community

- Launch referral program (give/get).
- “Owner stories” series; how customers use it in the real world.
- Community challenges to drive repeat usage.

Ads

- Add YouTube + Search expansion; audience stacking.
- Creative system: weekly new hooks, monthly big concepts.
- Run geo-lift tests to validate spend.

App / UX

- Milestone badges; preventative maintenance prompts; contextual tips.
- In-app referrals with deep-linked tracking.

Sales Assets

- Retail sell-in deck; channel promo kits; demo day kit.

Data

- Cohort LTV curves; payback targets (≤ 90 days for $< \$1.5k$ AOV; ≤ 180 for high AOV).
- Monitor contribution margin after returns/warranty.

KPIs

- Repeat rate 10–20% where applicable
- NPS > 50
- Paid share of traffic down by 10–20% vs Launch (healthier mix)

90-Day Plan

- Month 1: Referral + retention flows.
- Month 2: Personalization + bundles.
- Month 3: Channel expansion, creative refresh.

Stage D — Scale (Multi-Market / Multi-Channel)

Objective: Scale spend, localize, maintain efficiency.

Brand

- Codify brand system: patterns, audio, motion.
- Regional messaging playbooks.

Website / PDP

- Multi-region with geo-routing; localized pricing/financing, shipping SLAs.
- Performance budget (Core Web Vitals), accessibility AA+.
- Schema markup for products/reviews; content hub for SEO.

Social & Ads

- Always-on creator program; paid whitelisting; CTV in top geos.
- PR + thought leadership moments tied to product drops.

App / UX

- Advanced personalization; lifecycle states; churn-risk triggers.
- Incident comms templates for scale events.

Sales Assets

- Partner portal, co-op marketing kits, retail training modules.

Data

- Server-side tagging, data warehouse, MMM quarterly, incrementality program.

KPIs

- Stable CAC within target range at 2–3x spend
- Site CVR +10–20% via CRO/personalization
- Support cost per user flat/down

90-Day Plan

- Month 1: Localize top 20% of journeys.
 - Month 2: Geo-based creative and offers.
 - Month 3: MMM-lite + budget reallocation.
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Stage E — Lead (Category Leadership)

Objective: Defend the peak; expand the mountain.

Brand

- Category education content; benchmark reports; design collabs.

Website / PDP

- Content hub + community; limited drops; customization.
- Developer/partner ecosystem if applicable.

Social & Ads

- Big-idea brand campaigns; cultural moments; co-creates with tier-1 creators.

App / UX

- Predictive personalization; premium features; loyalty tiers.

Sales Assets

- Analyst kits, awards program, enterprise/retail case studies.

Data

- Clean rooms for partner insights; long-term MMM; brand lift studies.

KPIs

- Share of search + SOV growth
- LTV growth via premium tiers
- Market expansion efficiency

90-Day Plan

- Month 1: Flagship campaign + hero launch.
 - Month 2: Loyalty/premium upsell.
 - Month 3: Global partnerships.
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Quick Breakdowns

PDP Above-the-Fold Wireframe

1. Hero claim (performance-led) + price + financing
2. Proof stamp (rating count, top review)
3. Primary CTA + sticky add-to-cart/test-ride
4. 15–30s demo clip
5. 3 benefit icons (performance, practicality, proof)

Ad Testing Matrix (Week 1–4)

- Hooks x4 × Claims x4 × Formats x3 → 48 variants.
- Kill in 72 hours if CTR < 0.8% (prospecting).
- Scale winners 20%/day to cap.

30-Day Social Plan (per channel)

- Week 1: Performance demos (3), teardown (1)
- Week 2: UGC reviews (2), how-to (2)
- Week 3: Comparison (2), financing explainer (1)
- Week 4: Founder AMA (1), challenge (1)

Lifecycle Flows

- Welcome (3 emails/SMS): spec highlight → setup → social proof.
- Abandoned cart (3): objection busting → offer → urgency.
- Post-purchase (4): unbox → tips → review request → referral.
- Win-back (2): new feature/spec bump → incentive.

Offer Architecture

- Guarantee (no-regret).
- Financing (clear, near the price).
- Bundle (top accessory)
- Seasonal or mileage-based challenges.

Measurement Stack (Minimal → Advanced)

- **Minimal:** GA4, Meta/TikTok pixels, Clarity/Hotjar, UTM rules.
- **Standard:** Server-side GTM, Amplitude/Mixpanel, Segment, Klaviyo/Braze, Looker/Mode.
- **Advanced:** Data warehouse, MMM tool, incrementality testing, clean room for partners.

Core KPIs by Stage

- **Validate:** Waitlist CVR, creative hold rate, email CTR.
- **Launch:** PDP CVR, CAC/ROAS, refund rate.

- **Traction:** Payback, LTV:CAC, repeat rate, NPS.
 - **Scale:** CAC stability at higher spend, geo-lift, CVR by segment.
 - **Lead:** Share of search, brand lift, premium tier adoption.
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Common Pitfalls (And Fixes)

- **Spec soup, no story:** Group specs under 3 benefits; prove each with a clip or quote.
 - **Slow site kills intent:** Optimize media, lazy-load reviews, prefetch critical routes.
 - **Creative fatigue:** New hooks weekly; big swings monthly.
 - **Attribution lies:** Run post-purchase surveys; triangulate with experiments.
 - **Support buried in the app:** Put diagnostics and returns one tap away.
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Your 90-Day Action Plan

1. **Top Stage:**

2. **Primary bottleneck:**

3. **Website/PDP changes:**

4. **Social/ads sprints:**

5. **App/UX improvements:**

6. **Sales assets to ship:**

7. **KPIs & targets:**

Want this tailored to your product and price point?

Share stage, AOV, top channel, and current CAC. We'll map the exact site build, ad mix, and asset list for your next 90 days.