

Introduction

Melody McDonald Consulting LLC

Elevating Sales

www.Melody-McDonald.com

561-676-6892

You're building a career, a company, a team, a strategy. You're chasing goals, navigating real challenges, wearing too many hats, and trying to both win and find peace. That's where I come in.

I bring together 25 years of business growth experience with certified executive coaching - helping founders and teams grow both in performance and as people.

My approach blends neuroscience, sales psychology, and business intelligence.

It's strategic. It's human. And it works.

Enter:

The Services Playbook Template - Coaching, Sales & Go-To-Market

This tabbed document is your menu of strategic deliverables - designed to help us build a custom scope of work together.

It's the exact framework I've used to help companies drive 9-figure outcomes in B2B SaaS, EdTech, GovTech, and K-12 sales.

 **Use the tabs to explore each area.**

Whether you're refining your GTM, unlocking stalled growth, or developing your team, I'll help you take a deep dive—into your business and yourself—to reach new levels of success.

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Engagement Types

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Hourly Coaching & Consulting

Support for clarity, mindset, decision-making, and leadership growth

These are 1:1 sessions where you bring what's on your mind, and I help you work through it—from internal challenges to external roadblocks. It's your time to think out loud, gain perspective, and get support from someone who's been in the trenches.

Whether it's strategy, stress, burnout, team dynamics, or leadership tension—you bring the real. I help you process, reflect, and move.

- Booked by the hour
 - Pre-scheduled in advance
 - Flexible focus: mindset, performance, or leadership support
 - Includes access to emerging workbook & educational materials (in development) to deepen your growth between sessions
 - See the Coaching tab for more detail
-

Project-Based Consulting

Hands-on strategy, messaging, or go-to-market execution—done for you

Consulting is where I take the lead on building your custom plan, sales strategy, or GTM approach. It's ideal for companies who need strategic support, clarity, or lift on specific projects—from unlocking stalled growth to preparing for investment or acquisition.

Each tab in this playbook represents a potential project scope. Once we have a discovery call, I'll build a proposal based on what you need most.

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- **Billed per project**
- **Timeline and deliverables outlined after discovery call**
- **Strategy work includes messaging, territory planning, vertical analysis, conference strategy, and more**
- **Playbook tabs guide the process and help us align on deliverables**

Executive Coaching

Executive Coaching and Business Educating

Coaching: Strategy for Your Mindset and Your Mission

Sometimes what's blocking growth isn't the strategy, it's the internal roadblocks we haven't named yet. Most often, you are searching for the answer and it's right in front of you.

I have the business acumen to give you deep insights that help you uncover what you are missing.

Coaching with me is about more than leadership development. It's about clearing what gets in your way, and finding the path to get done what you need to, delegate what you don't, and embrace the success in your career that is already yours. I will help you see yourself more clearly so that you can make life changing decisions for you to grow, decide, lead, and move forward without resistance.

There are two ways we can work together through coaching:

1. Business Coaching

Bring your current challenges: Broken messaging, revenue stalls, team performance, scaling decisions, hiring, founder fatigue - and we'll work through them together.

You're still the driver, but I'm here to help you see clearly, focus your energy, and take aligned action.

This is for founders, executives, and high-performers who want structure, clarity, and thought partnership that keeps pace with real business.

2. Deep Coaching (Mindset & Identity Work)

Sometimes the challenge isn't external. It's internal. In this space, we focus on your **beliefs, patterns, identity, and emotional habits**, the things that influence *how* you show up in every room.

Whether you're navigating burnout, self-doubt, people-pleasing, boundary setting, or just wondering what's next, this is where transformation begins.

Both coaching styles can stand alone—or blend together.

We can move fluidly between business decisions and deeper personal clarity, depending on where you are. The goal is always the same: helping you lead and live from alignment, not reaction.

- Coaching sessions are available on a one-time, short-term, or ongoing basis.
- Book a discovery call or coaching session directly from my site to get started.

[BOOK HERE](#)

Tactical Coaching

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Personal & Professional Coaching – Elevating the Leader Behind the Strategy

Behind every strategy is a human being. And behind every growth opportunity—whether it's sales, leadership, or impact—is a moment to pause, reflect, and realign.

In addition to my business strategy and tactical execution services, I offer **one-on-one coaching for founders, executives, and mission-driven professionals** who want to lead with clarity, confidence, and personal integrity.

This isn't fluff. This is **inner work that drives outer results**.

Coaching That Integrates the Mind, the Mission, and the Moment

As a **Level 2 PCC-Certified Neuro-Shine Technology™ Coach**, I blend the science of **neuro-linguistic programming (NLP)** with deep inquiry, mindset reprogramming, and behavioral coaching.

Whether you're navigating the pressures of scaling a business, fundraising, public leadership, or launching your next chapter—our work is focused on helping you become **the next version of you** with precision and presence.

Core Coaching Focus Areas:

Thought Mastery & Belief Rewiring

Identify and dissolve limiting beliefs, inner conflicts, or mindset blocks that affect your leadership, communication, or visibility.

Alignment of Mission & Identity

Make sure the work you're doing *feels* like it's in alignment with who you are. Rediscover your "why" and integrate it into your professional brand and behavior.

Language & Communication Coaching

Use NLP-based coaching to refine how you speak to yourself and others, improving everything from investor conversations to internal team dynamics.

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Decision-Making with Clarity

Learn how to use intuition, logic, and subconscious signals to make more aligned decisions, especially under pressure or uncertainty.

Energetic Recalibration for Leaders

Unpack what's draining you, and re-channel your energy where it actually makes a difference. Learn how to say no without guilt and lead without burnout.

How Coaching Works

This is a safe, judgment-free space to explore both **strategic and emotional alignment**, whether you're in transition, building something big, or feeling like something isn't quite clicking.

- Private 1:1 sessions via Zoom
- Monthly or milestone-based options
- Custom integration with your business strategy work (if desired)
- Rooted in certified PCC coaching standards and ethical NLP principles

Because How You Lead is Just as Important as What You Build

You don't need to change who you are. You need to improve how you show up. You need to become *more of who you are*, on purpose, and with power.

Consulting Picklist

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Setting Up the Right Meetings

I help identify and schedule **relevant, high-impact meetings** that align with your target personas and sales strategy. This might include:

- District and state leadership calls
- Strategic follow-ups post-conference
- Partner or policy alignment conversations at the state level

Building Operational Support Around Your Strategy

I help you make the playbook executable, turning ideas into:

- Email cadences that get replies
- CRM workflows that are easy to maintain
- Follow-up systems that don't let warm leads go cold

One-on-One Working Sessions

You won't be handed off to a junior consultant. You'll work directly with me, one-on-one, to:

- Workshop language, assets, and outreach
- Problem-solve blockers in real time
- Keep momentum between strategy and sales

You're Not Alone in Execution

Whether we're replaying a Zoom recording, tuning your discovery questions, or helping you land the right message with a policymaker or superintendent—I'm in it with you.

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This is not just about getting a plan.

It's about getting traction.

Let's build, refine, and win—together.

Customer Pain Study

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Your Customer Pain Study – Capturing the “Before & After” to Refine Market Positioning

Everyone’s talking about growth... no one’s talking about misalignment. Until now.

This section introduces the **Customer Pain Study**—a strategic listening exercise designed to uncover the real challenges your product solves, as described by the educators and administrators who experience them firsthand. The goal is to surface before-and-after insights that can be directly translated into sharper positioning, more resonant messaging, and more effective customer engagement strategies.

Why This Matters

- Customers often articulate your value better than your internal team. Their authentic language becomes high-impact messaging for sales, marketing, and investor communications.
- Understanding pre-implementation pain points alongside post-implementation outcomes reveals what truly matters to your users—not just what you assumed.
- These insights help refine your **market positioning**, strengthen **objection handling**, align with **target buyer budgets**, and reinforce both the **emotional and functional ROI** of your solution.

Study Format & Execution

This study is conducted by Melody - optionally alongside a member of your team - and is typically video recorded for internal use. It can be executed through:

- A concise Google Form or survey (ideal for wide reach and rapid insights)
- Short-form interviews (ideal for deeper storytelling, strong quotes, and rich feedback)

To ensure high response rates and usable outcomes, the format is kept **simple, brief, and user-centered**. Responses are structured around four core insight areas.

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What This Exercise Provides (When Customized)

This strategy delivers **clear, actionable insight** into the mindset of your market—and ensures that your messaging reflects the lived experience of your end users. It also aligns your positioning with **top-down policy language** used in each territory, while mapping directly to the challenges your target audience is facing—using their words, not yours.

This is the **foundation on which all other strategic components are built**. From here, we tailor the remainder of the engagement based on actual need, rather than assumptions.

Budget & Grants

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Budget & Grant Review Template – Custom Mapping Funding to Opportunity

"More hours ≠ more results. It's not about how much work you do. It's *where* and *why* you do it. That's what we solve together."

This section provides a replicable framework for analyzing **state education budgets, grant programs, and funding allocations** across all 50 states. We align and choose states by using information on the current customer territory and growth goals. The goal is to identify where funding aligns with your product's value proposition and to inform the **Target Territory Rubric** (see Tab) with data that supports prioritization.

Rather than relying on anecdotal interest or general market size, this approach surfaces **concrete signals of readiness and alignment**—including how much money is available, who it's meant for, and what political and strategic objectives it supports.

Why This Matters

- Helps you focus outreach and marketing dollars where **real funding exists** for your product category
- Enables your messaging to align with **state-specific language and initiatives**
- Supports **territory planning** with data, not guesswork
- Reveals entry points based on **programs, populations, or policy momentum**

How It Works

We review and include a copy of each state's enacted or proposed education budget to extract relevant information, including:

- Total and per-student K–12 funding

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- Strategic investments in your vertical (e.g., SEL, STEM, literacy, teacher workforce, career readiness)
- Specific grants or discretionary funds your product may qualify for
- Populations prioritized (e.g., low-income, English learners, foster youth, rural students)
- Implementation timelines and expiration dates for relevant initiatives
- Governor's stated education priorities and policy agendas

This information is used to:

- Build a comparative snapshot across states
- Identify top-alignment territories for your product or service
- Translate budget language into **positioning and messaging insights**

What This Tab Includes (When Customized):

- A template to track and compare funding opportunities by state
- Potential key fields will be scored, such as:
 - Relevant line items (by initiative or grant name)
 - Target populations
 - Funding totals and per-student spend
 - Legislative or gubernatorial priorities
 - Grant deadlines and timelines

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- Notes on how the funding aligns with your product (e.g., implementation match, messaging cues)
 - Guidance on where to find official sources (e.g., eBudget portals, PDFs, policy memos, or state education sites)

Riding Sidecar

Tactical Execution & One-on-One Support – Sidecar Strategy in Action

Strategy without execution is just a document.

That's why I don't just hand you a playbook and wish you luck. I ride **sidecar** with you through the parts of execution that matter most. Whether you're refining a pitch, scheduling key meetings, or adjusting your outreach after a demo that didn't land, I provide **hands-on support** to help you move from insight to impact, fast.

Here's What Tactical Execution Looks Like:

Riding Sidecar on Sales & Partner Calls

I join you on key prospect or partner calls—sometimes live, sometimes listening to recordings—so we can:

- Diagnose what's working (and what's not) in real time
- Debrief immediately with feedback and action steps
- Adjust your approach while momentum is still high

Improving Recorded Demos & Pitches

You send me a recorded demo or sales presentation, and I'll:

- Identify where messaging gets lost or buried
- Reframe product benefits to better match buyer psychology
- Recommend new slides, edits, or talk tracks that convert

Target Rubric

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Custom Target Rubric – Prioritizing States for Strategic Growth

This section outlines the **Target Rubric**, a data-driven tool used to identify and prioritize the states most likely to yield successful outcomes based on current funding, population needs, and political alignment. It serves as a strategic compass, ensuring your sales, marketing, and partnership efforts are focused where **conditions are most favorable for growth**.

Informed by a review of the market vertical and demonstrated need, the rubric also identifies relevant **buzzwords and political terminology** that influence decision-making. These terms are then integrated into sales messaging to ensure alignment with each state's educational priorities and political climate - whether red, blue, or purple - so that your outreach is both appropriate and resonant across diverse regions.

What It Is

The rubric is a **custom scoring system** that evaluates states against multiple weighted criteria, including:

- **Relevant budget allocations** tied to your product category (e.g., SEL, STEM, mental health, workforce readiness, etc.)
- **Population indicators**, such as underserved student groups, district size, or rural vs. urban breakdown
- **Political alignment and top-down agendas**, ensuring your messaging and offering align with current state leadership priorities
- **Grant and funding momentum**, including ESSER, ELO-P, Title funds, or state-level innovation grants
- **Procurement structure**, assessing ease of entry and likelihood of scaling once a foothold is established

Why It Matters

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- Focuses your team on **territories with the highest return potential**
- Avoids wasted effort in low-yield or politically misaligned regions
- Supports **go-to-market messaging** that's customized per state, using local policy language
- Equips leadership with clear, defensible logic behind expansion priorities
- Creates visibility for where to concentrate **sales efforts, conference presence, or lobbying resources**

What This Tab Includes (When Customized)

- A tailored state-by-state scoring table with weighted factors
- Summary of top-ranked states based on strategic fit
- Breakdown of relevant budget language and funding amounts for each target region
- Insights into which student populations (e.g., high-needs, rural, multilingual) align best with your offering
- Recommendations for sequencing outreach and resource deployment

This rubric isn't static, it's a living tool designed to adapt with legislative shifts, funding renewals, and evolving political climates. It ensures that **every decision made around expansion is informed, intentional, and aligned with real-world opportunity.**

Melody will support you in providing a pathway to update the rubric on an annual basis.

Shark Cage

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Building the Customized Shark Cage – Creating Unified Messaging That Sells

You're not just building a product. You're building a movement. But your strategy should match that energy! Here's how we map it. The Shark Cage is one of the most foundational tools we build together. It's not just a messaging framework—it's a **company-wide alignment system** that ensures everyone on your team speaks about the product the same way, with clarity, conviction, and consistency.

At its core, the Shark Cage is about **anchoring your go-to-market strategy in customer pain**, and positioning your solution as the most credible, urgent, budget, political, and value-aligned response. It allows you to unify internal teams, sales, marketing, product, and customer success, around a shared understanding of:

- What your product really solves
- Who it's for
- Why it matters now

Why It Matters

- **Consistency closes deals.** When every member of your team (from the CEO to a new SDR) can clearly articulate the same problem-solution-impact narrative, you earn buyer trust faster.
- **Clear problem framing positions your product as essential.** Shark Cage messaging starts with the customer's pain and maps directly to your solution.
- **Internal alignment fuels scale.** You can't grow confidently until your teams are selling and supporting the same story.

What the Shark Cage Includes

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- **Crisis/Pain Framing**

A clearly articulated set of urgent customer problems, backed by emotional, operational, and political context.

- **Solution Mapping**

A detailed breakdown of how your product addresses each pain point, with attention to what makes it different from other options.

- **Customer Outcomes & Impact Metrics**

The “after picture” that shows real-world success stories and quantifiable benefits.

- **Persona-Specific Use Cases**

Tailored examples for different buyers or influencers (e.g., district leaders, mental health coordinators, tech directors, etc.)

- **Messaging Tools**

Short and long taglines, elevator pitches, and key phrases that can be used across your website, decks, outreach, and demos.

- **Sales Enablement Alignment**

A structure that links your Shark Cage to your pitch decks, follow-up emails, and CRM tracking, so your sales team stays on message at every stage of the funnel.

How We Build It

This is a **collaborative process**. We combine market research, customer interviews (see Tab), competitive analysis, and your existing product narrative to craft a Shark Cage that feels **authentic, urgent, and effective**. Once built, it becomes the backbone of everything that follows, from strategic content to sales touchpoints.

Sales Messaging

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Custom Sales Messaging – Aligning with Policy Priorities and Language That Resonates

This section analyzes the current market landscape by identifying top-down messaging trends emerging from governors, legislators, and other state-level leaders. It provides a curated review of public-facing education policy language; including buzzwords, legislative priorities, and key themes from recent State of the State addresses and budget proposals, that directly relate to your product or SaaS solution.

We assess which words and ideas are being championed by decision-makers, such as “career readiness,” “mental health,” “science of reading,” “workforce pipeline,” “teacher retention,” and “school safety,” and align your company’s core messaging to those themes. By translating your solution’s features into the language used by policymakers, we increase the likelihood of resonance in legislative briefings, RFPs, and district decision-making meetings.

Importantly, this section also addresses **political neutrality in messaging**. In today’s climate, the right terminology can either open or close doors. We help you avoid partisan landmines and ensure your messaging is inclusive and appealing across ideological lines. Whether you’re selling in red, blue, or purple states, this tab ensures your language is framed to meet the practical needs of districts and agencies—while staying out of ideological crossfire.

Once customized, this tab will include:

- A tailored summary of relevant governor and legislative language specific to your vertical.
- Buzzword alignment mapping between your offering and policy language.
- Politically neutral rephrasing suggestions to position your messaging for broader adoption.
- Sample language you can use in pitch decks, proposals, and outbound campaigns.

Personas

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Personas – Mapping Decision Makers, Influencers & Political Context

Most founders and young teams waste 60% of their funding chasing the wrong customers. Here's how we fix that in a short engagement.

This section offers a detailed breakdown of the stakeholder ecosystem surrounding K-12 education purchasing decisions. Effective sales and partnership strategies begin with understanding who holds the power, who influences the process, and how political context shapes their priorities.

We map out the full spectrum of relevant personas across key organizational categories:

- Legislative (e.g., Education Committee Chairs, Appropriations Members)
- State Agency (e.g., State Superintendent, CIO, Procurement Officers, Grant Program Leads)
- District (e.g., Superintendent, CFO, CTO, Curriculum Directors, Student Services Leaders)
- School Site (e.g., Principal, Counselor, Teacher Leader)
- Nonprofit & Advocacy groups (e.g., Foundation Program Officers, Think Tank Directors, Parent Organizing Groups)

Each persona is categorized by their role in the decision-making hierarchy—whether they are:

- Primary Decision Makers (e.g., CIOs, Superintendents, Procurement Directors)
- Key Influencers (e.g., Teachers, State Policy Advisors, Advocacy Group Leaders)
- Political Champions or Barriers (e.g., Governors, State Legislators, Union Leaders)

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We also outline why these roles matter, what messaging and approach resonates with each, and the channels through which they engage (e.g., policy roundtables, professional associations, procurement committees, RFP review boards).

Crucially, this section includes insights on state-level political agenda awareness, highlighting which roles are likely to have strong ideological leanings, policy priorities, or legislative influence that could impact adoption.

Once customized, this tab will include:

- A matrix of stakeholder personas by organization type and level of influence
- Recommended engagement strategies for each persona
- Insights into persona motivations and pain points
- Political context indicators that inform tone, timing, and messaging

Tech & Certifications

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Tech Stack & Certification Readiness – Building for Procurement Success (Large and State Level Targets)

This section provides a comprehensive evaluation of the technical and compliance requirements your organization must meet to win large-scale contracts with K-12 school districts and state education agencies. As procurement processes grow more complex, especially at the state level. Your product's underlying infrastructure and certifications are just as critical as its core functionality.

We begin by mapping your current tech stack against common district and state procurement criteria, including:

- **Data security and privacy standards** (FERPA, COPPA, SOPIPA, etc.)
- **Interoperability** and integration capabilities (e.g., with SIS, LMS, or state-level data systems)
- **Hosting environment compliance** (on-prem, cloud-based, SOC 2, ISO 27001, etc.)
- **Scalability and support expectations** for multi-district or statewide implementation

To ensure nothing is missed, this section also incorporates insights gained through **Freedom of Information Act (FOIA) requests** of previously awarded RFPs to major competitors. By analyzing how similar vendors have positioned themselves to win large contracts, we reverse-engineer:

- The certifications and documentation they provided
- How they addressed infrastructure and compliance questions
- Common scoring rubrics used in technical evaluation sections

This forensic approach not only benchmarks your readiness, but highlights gaps that may need to be addressed proactively. Examples: missing certifications, weak privacy language, or underdeveloped documentation, so these pieces may be addressed before your next major bid.

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Once customized, this tab will include:

- A technical gap analysis comparing your current stack to procurement expectations
- A list of required and recommended certifications for target states or districts
- Summaries of FOIA-obtained RFP requirements from recent competitor wins
- Recommendations for tech, security, and compliance upgrades needed for procurement success

By arming your team with this information, you'll be better prepared to enter high-stakes procurement conversations with credibility and confidence.

Pitch Deck for prospects

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Custom Persona-Based Pitch Strategy – Tailoring Outreach to Decision-Maker Mindsets or Investor decks to target fundraising

This section focuses on the strategic value of developing differentiated pitch decks for distinct persona types. Whether you're engaging a STEM curriculum leader or a student mental health coordinator, the key to conversion lies in anticipating their priorities, pain points, and preferred language, and delivering a presentation that speaks directly to those or broadly captures the target space.

Each deck should:

- **Address known challenges** faced by that persona, ideally before they voice objections and anchor the space to explore this with the prospect.
- **Highlight aligned benefits** - student outcomes, teacher usability, district ROI, or wellness gains.
- **Include proof points to establish company integrity and address known objections up front** through testimonials, outcomes data, or quotes from trusted peers.

While the visual and structural style of each pitch deck remains consistent for brand cohesion, the content and talking points are finely tuned to meet the emotional and strategic mindset of each audience. These decks are equally effective when sent in advance of a demo, used live during presentations, or included as a follow-up alongside pricing or proposals.

Once customized, this tab will include:

- Key points for each slide categorized
- Slide framework examples tailored to K–12 stakeholders
- Best practices for overcoming objections through narrative
- Guidance on sequencing materials before and after a product demo

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By developing and using these targeted materials, your team can build trust faster, reduce sales cycle length, and increase your likelihood of securing stakeholder buy-in across complex decision-making groups.

Let me know if you'd like a template slide outline to include without revealing your own decks—or if you'd like to gate the actual samples as a value-add for consulting clients only.

You said:

talk about how a pitch deck is used for sales people to stay on task, encourage prospects to talk 80 percent of the time in the conversation and how the pitch deck keeps the sales team on task to drive higher success close ratios

ChatGPT said:

Absolutely—here's a refined extension to add into **Tab 5: Persona-Based Pitch Strategy**, emphasizing the **internal sales enablement value** of the pitch deck:

Why the Pitch Deck Matters Internally: Driving Sales Focus and Increasing Close Ratios

Beyond being a tool for prospects, a well-designed pitch deck is a **powerful internal compass for your sales team**. It ensures consistency in messaging, supports consultative sales strategies, and keeps your reps focused on listening more than they speak.

Great sales conversations are not presentations—they're **structured explorations**. Your deck is the map, not the destination. When used correctly, it helps your team:

- Stay on message without overselling
- Ask better questions that uncover real needs
- Avoid veering into technical details or tangents too early
- Reinforce brand credibility through polished, visual storytelling

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A core principle we emphasize is the **80/20 rule** in sales conversations: **the prospect should be talking 80% of the time**. Your deck supports this by:

- Providing visual anchors that spark dialogue
- Offering talking point prompts—not scripts—to keep the conversation flowing
- Ensuring reps don't rush into feature dumps or premature demos

Used properly, the pitch deck creates a **repeatable, high-performing sales motion** that builds trust, aligns to buyer priorities, and increases close ratios across your pipeline. It helps new reps ramp faster, and experienced sellers stay sharp and focused.

CRM - Scale

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CRM Setup & Scaling Infrastructure – Laying the Foundation for Repeatable Sales

A well-configured CRM is the backbone of any scalable sales strategy. This section provides a blueprint for implementing a lightweight, cost-effective CRM solution, with Salesforce, HubSpot (free for up to 3 users) or another effective CRM, as the recommended starting point. The goal is to create a centralized, actionable system that streamlines contact management, sales tracking, and follow-up, without requiring heavy technical lift or IT staff.

This tab outlines what to track, how to track it, and why it matters, so your team can move from fragmented spreadsheets and post-it notes to a fully visible, data-driven outreach strategy.

By formatting your CRM correctly from day one, you position your organization to:

- Make consistent and timely follow-ups
- Identify patterns in conversion and lead quality
- Prepare for growth through SDRs, BDRs, or external sales teams
- Create visibility across your sales process for both strategic and tactical planning

What CRM to choose? Look for something that meets the following goals:

- Free for 3 users
- No coding or tech support required
- Built-in tools for pipeline management, email tracking, and task reminders
- Seamless integration with Gmail and Outlook
- Scales easily as your team or product line grows

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Double Tap - Sales Strategy

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Customized Email Cadence Strategy – The Double Tap Method for K-12 Sales

This section introduces a high-conversion outreach framework known as the **Double Tap Strategy**. This is a proven method for increasing engagement and response rates in K-12 sales outreach. The strategy involves a **coordinated cadence of emails and phone calls** that reinforce one another, creating a gentle but persistent rhythm that builds familiarity, curiosity, and trust with prospective clients.

Instead of relying on one-off cold emails or impersonal drip sequences, the Double Tap Method helps sales teams:

- Stay top-of-mind through personalized, well-timed outreach
- Build credibility through value-first messaging
- Drive urgency and action through human connection

Each outreach touchpoint is crafted to do one of three things:

1. **Identify a relatable pain point** felt by the decision-maker
2. **Deliver meaningful value or social proof** (not just product features)
3. **Extend a clear invitation** for connection, without pressure

What sets this strategy apart is its **dual-channel reinforcement**: every email is paired with a **brief, empathetic voicemail** that references the email and nudges the recipient to engage. Over a 2–3 week sequence, this approach maximizes open rates, response rates, and meeting conversions, without feeling pushy or transactional.

Once customized, this tab will provide:

- A sample outreach cadence structured around 5–6 touchpoints

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- Email and voicemail goals for each step (identify pain, offer value, present solution, etc.)
- Best practices for tone, timing, and subject lines that resonate in the K-12 space
- Recommendations for integrating LinkedIn engagement where appropriate
- Guidance on when to exit, pause, or reschedule outreach based on replies

By following this structure, sales teams can increase connection rates and shorten sales cycles, while remaining respectful of the time and priorities of education leaders. It's especially effective when paired with your CRM setup (see Tab 4) and persona strategy (see Tab 3) to ensure every outreach feels personalized and purposeful.

Event Lead gathering

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Customized Strategies Event Lead Generation & Follow-Up – Converting Interest into Opportunity

Events: whether national conferences or local educator meetups - represent some of the highest-leverage opportunities to generate qualified leads, build brand awareness, and accelerate relationships. But too often, leads collected at events **sit idle**, become disconnected from CRM workflows, or are followed up on too late to convert. This tab is designed to solve that gap.

The goal here is to build a **repeatable, low-cost, high-impact event lead strategy** that energizes your booth presence, captures meaningful contact information, and funnels those leads directly into a **CRM-powered double tap follow-up sequence**.

Why It Matters

- **Event leads are warm.** You've already made a real-world connection—don't let it go cold.
 - **Timeliness is everything.** Studies show the first 24–72 hours post-event is the highest window for engagement.
 - **Good data = scalable sales.** Clean, categorized contact info fuels your CRM, your email sequences, and your sales pipeline for months.
-

Lead Capture That Works

This playbook section customizes creative, approachable ways to collect contact info that don't rely on outdated business card exchanges. One proven example that I love: **scratch-off incentive cards**. This is a method designed to gamify the process, lower the barrier to entry, and give attendees a reason to engage without feeling like they're "being sold to."

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Post-Event Follow-Up: The CRM + Double Tap Advantage

Once leads are entered into your CRM (see **Tab 4**), this tab provides a **repeatable follow-up cadence** that ties directly into the **Double Tap Strategy** (see **Tab 6**), ensuring no lead is lost or mishandled. The cadence begins with a **warm, personalized thank-you email** that references the booth experience, the scratch-off game, or the second-chance drawing.

From there, your leads should flow into a **persona-specific email series (double tapped)** designed to:

- Surface common pain points
- Share relevant stories or case studies
- Invite brief intro calls or demos

Once customized, this tab will include:

- A plug-and-play scratch-off card template and incentive guidelines
- Best practices for event-day engagement and contact collection
- CRM tagging workflows to segment leads by event, region, or product interest
- A post-event email and call cadence with editable message templates
- Timeline guidance for first contact, follow-up, and re-engagement cycles

Pricing Strategy

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Tab: Custom Pricing Strategy – Aligning Value, Market Position, and Buyer Realities

Your pricing strategy is more than a number - it's a positioning tool. It shapes how buyers perceive your value, determines how competitive you are in the market, and directly impacts your ability to gain traction, scale, and sustain profitability. A strong pricing structure must be **strategic, consistent, and informed by both your competitors and your buyers' budgets**.

We will work together on designing a **pricing architecture that balances clarity, flexibility, and strategic leverage**, so your team can navigate deals with confidence and win trust without eroding margins.

A successful pricing strategy does three key things:

1. **Signals market credibility and value:** A clear, structured pricing model builds buyer confidence and makes comparisons easy.
2. **Provides room for negotiation and “client wins”:** A built-in flex zone allows sales teams to deliver tailored offers without undermining your model—creating perceived value and goodwill.
3. **Aligns to real-world budget cycles and constraints:** Pricing must reflect what districts and state agencies can actually afford, based on funding windows, grant eligibility, and their spend on comparable tools.

Just as important, **your pricing should be framed in context of the competition:**

- How do competing solutions structure their pricing?
- Are they bundling services? Offering implementation support for free etc?
- Are they anchored high and discounting heavily, or are they racing to the bottom?

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Understanding competitor price points and contract terms (via public procurement data, FOIA-obtained RFPs, or buyer feedback) helps you position your solution as a better-value alternative, **not necessarily cheaper, but smarter and easier to buy.**

This tab helps you define:

- A **baseline pricing framework** that's easy to communicate and hard to undercut
- **Competitive intelligence-informed adjustments** that reflect market norms without falling into pricing wars
- A strategy for pricing **in alignment with your customers' available budgets** (e.g., Title I, ESSER, SEL grants, general funds)
- Techniques for **value stacking** (adding elements like onboarding support or extended licenses to make the deal feel like a win)
- Clear **guardrails for discounts**, pilot offers, and long-term pricing tiers that allows sales team members to negotiate within boundaries that build confidence.

Once customized, this tab will include:

- Sample pricing tiers tailored to your delivery model (per user, per classroom, per school, etc.)
- Competitive pricing insights and common deal structures in your market
- Budget alignment tools (e.g., pricing mapped to common state or federal funding types)
- Recommended talking points for overcoming sticker shock or positioning against lower-priced competitors

Ultimately, a thoughtful pricing structure doesn't just help you close, it positions you to **scale intentionally**, with margins that support reinvestment, and deals that reflect both **your value and your buyers' reality**.

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Customer Expansion

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Customized Customer Expansion & Referral Strategy – Leveraging Success to Drive Scalable Growth

Your existing customers are your most powerful growth engine. This section introduces a strategic framework for **turning satisfied school, district or state sites into active advocates where your customers are literally selling on your behalf**, enabling expansion within districts and into neighboring schools through structured, value-driven referral opportunities.

We will craft a customized strategy that centers on the community and schools that you already serve. At the heart of this approach is a **community-based, low-barrier referral model** that builds trust and generates momentum without feeling salesy. Rather than relying solely on outbound efforts, this strategy harnesses the voices of your champions, teachers, principals, or district leads who have seen success with your program, and positions them as co-hosts in your growth journey.

Why It Works

- **Social proof builds trust:** When educators hear about impact directly from their peers, skepticism decreases and curiosity increases.
- **Districts are more likely to scale internally:** Familiarity and shared success stories reduce friction for expanding into new schools within the same system.
- **Referral-based introductions outperform cold outreach:** Warm invites from trusted contacts accelerate buy-in and shorten sales cycles.

Strategy Overview

The playbook outlines a **structured referral pathway**—centered around informal, collaborative gatherings that create space for existing users to introduce your program to colleagues and district stakeholders. These events are hosted at a current customer school site and facilitated by your team, with light logistics, engaging content, and thoughtful follow-up built in.

The goal is to:

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- Create moments of connection and peer validation
- Position the existing school as a success story
- Invite attendees from nearby schools or district leadership to explore the program firsthand
- Trigger 1:1 interest for pilots or scaled implementation

What's Included (Depending on hours of engagement)

- A high-level event format for educator-to-educator sharing
- Outreach templates to support co-hosted referral events
- Messaging to engage both site-level staff and district leadership
- A post-event follow-up structure that ties into your CRM and Double Tap strategy
- Guidance on tracking expansion interest and referrals in your CRM (see Tab 4)

This strategy enables your team to **scale organically** by building on momentum where it already exists. It respects educators' time, elevates your best users into program ambassadors, and opens doors to districts that may otherwise take months to access through traditional channels.

Conferences

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Personalized Conference and Speaker Strategy – Investing in the Right Rooms for Maximum ROI

This section focuses on developing a **targeted conference strategy**—one that ensures your team is investing time, budget, and presence where it matters most. With hundreds of education conferences happening each year, the key isn't just showing up, it's showing up in the **rooms that move the needle** for your sales, partnerships, and visibility.

Why It Matters

- **Conferences are high-touch opportunities.** They offer rare, concentrated access to district leaders, teachers, counselors, and funding decision-makers in one place.
- A smart strategy avoids spray-and-pray spending and instead channels resources into **the most aligned events**—those that map to your product's vertical, your ideal persona, and the funding realities of your target states.
- Conferences are also **brand accelerators**—when done right, they position your company as relevant, credible, and active in the education space.

How We Approach It

Rather than taking a blanket approach, we help you build a **prioritized conference calendar** that supports:

- **Your target personas** (e.g., counselors, curriculum leaders, mental health coordinators, STEM administrators)
- **Your funding alignment** (e.g., ESSER, SEL grants, career readiness funds)
- **Your go-to-market stage** (whether you're breaking into new states or reinforcing established ones)

Our process includes:

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- Identifying the **highest-impact conferences** based on your product category and target audience
- Mapping each event to **funding seasons, political context, and policy windows**
- Evaluating ROI based on attendee profiles, visibility opportunities (booth, speaking, sponsoring), and competitive presence
- Recommending levels of engagement—from **full booths and lead generation strategies to light presence or partnership attendance**

What This Tab Includes (When Customized):

- A curated conference calendar aligned with your product's vertical and funding niche
- Budget tiers and recommendations based on ROI potential
- Persona alignment for each event (who will be there and why they matter)
- Strategic engagement options (booth, speaking, sponsoring, attending)
- Travel efficiency and geographic overlap with top-priority states (from your Target Rubric in Tab 14)

Your budget is finite. This strategy ensures you put your energy where the **right decision-makers are already gathered—and ready to engage**.

RFP Strategy

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Proactive RFP Strategy – Influencing, Shaping, and Winning Before the Bid Drops

Navigating public sector sales isn't just about responding to RFPs—it's about shaping them before they're written. With over 20 years of success in K-12, EdTech, and state government markets, I specialize in helping companies position their products and services in front of the right people, at the right time, with the right message.

What I Do

Get Ahead of the RFP

- Educate state and local agencies about unmet needs and best-in-class solutions
- Leverage lobbying partnerships to ensure product-aligned language appears in future RFPs
- Position clients as thought leaders early in the procurement cycle

Shape & Influence Without Overstepping

- Guide teams through the **pre-RFP engagement process**—the critical window before formal procurement begins
- Maintain compliant, ethical relationships with government decision-makers
- Help you “walk the line” between relationship-building and procurement restrictions

Respond Strategically

- Expertly decode RFP requirements and evaluation criteria
- Align solution offerings with procurement scoring rubrics

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- Craft compelling, compliant proposals that win contracts

Why It Matters

- **RFPs are rarely neutral.** They're often shaped by early conversations, pilot programs, and political priorities.
- **If you're only showing up at the RFP stage, you're already behind.**
- **I help you play the long game—ethically and strategically.**

Clients Trust Me Because:

- I've built multi-million-dollar public sector pipelines
- I've supported companies through Series A/B funding based on state contract growth
- I understand the politics, timing, and nuance of **state procurement cycles**
- I help you win without burning bridges

Team Growth

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Scaling a Sales Team: From Founder-Led to Fully Built Out, Operational Team

At **Melody McDonald Consulting LLC**, we help visionary companies scale their sales operations with clarity, structure, and strategic foresight. Whether you're a solo founder closing your first deal or a growth-stage company preparing to scale nationally, we build **scalable, sustainable sales engines** that evolve with your product maturity, funding stage, and market opportunity.

This isn't just about building a team, it's about building the *right* team, at the *right* time, with the *right* structure to win.

Stage 1: Solo or Founder-Led Sales

Perfect for early-stage startups or launching a new vertical. At this stage, **the founder *must* be the first seller**, not just to prove product-market fit, but to deeply understand the psychology of the buyer.

Not every founder is naturally inclined to sell, but **sales is a skill, not a personality trait**. It can be taught. It can be coached. And with the right formula, it can become repeatable and scalable.

Characteristics:

- Founder or single rep manages the full sales cycle
- High-empathy, high-touch outbound, focused on pain and listening, not just pitching
- Informal territory mapping aligned to state funding, policy, or urgent need

Focus Areas:

- Mastering objections and buyer psychology
- Testing and refining messaging, pricing, and positioning

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- Securing lighthouse clients to build proof and momentum
- Documenting processes to create a future playbook for your team

Stage 2: Pod-Based Sales Team (*Hunter + Support Model*)

Ideal for companies with early traction and a validated product. The pod model allows your team to **scale efficiently while maintaining accountability and focus**.

Team Format:

- **AE (Hunter)**: Owns outbound, discovery, relationship-building, and closing
- **SDR/BDR**: Researches, qualifies, and sets appointments
- **CSM**: Owns onboarding, retention, and expansion
- **Sales Ops** (as growth allows): Ensures data, tools, and reporting infrastructure. Positions company for investor potential.

Benefits:

- Agile pods allow for focused regional or vertical growth
- Sellers stay in their zone of genius—hunters sell, CSMs grow
- Easier to manage, coach, and measure performance by pod

Structure Variations:

- Pods organized by **state strategy** (e.g., school mental health in California)
- Or by **buyer type** (small vs. large districts, public vs. charter)

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Stage 3: Territory-Based Expansion

For growth-stage or enterprise-ready companies expanding into **national or multi-state public sector markets**.

Structure:

- Reps assigned to **geographic territories** based on funding levels, legislative activity, and target demographics
- Expansion across **market verticals** (e.g., CTE, SEL, early childhood) with reps aligned by both **territory and function**
- Supported by **regional marketing** and **state-specific messaging**

Team Components May Include:

- **Territory AE**
- **Government Affairs or Lobbying Partner**
- **CSM/Account Manager**
- **Grant or RFP Specialist**

Benefits:

- Enables deeper local relationships and ecosystem influence
- Aligns sales efforts with **state procurement cycles and funding timelines**
- Drives long-term wins by embedding into the regional education and policy fabric

Strategic Considerations When Scaling

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- **Funding Alignment:** Sales headcount should mirror addressable market and grant availability
- **Headcount & Turnover:** Train teams well—and have rapid ramp plans to replace roles if needed
- **Internal Knowledge Systems:** Build playbooks, objection libraries, onboarding, and enablement early
- **Sales Culture:** Encourage continuous learning, peer feedback, and mission-driven collaboration
- **Tools & Ops:** Invest in CRM hygiene (HubSpot), dashboards, and standardized reporting

Let's Build the Right Team for the Right Stage

Whether you're:

- Hiring your first AE,
- Designing a pod-based structure for scale,
- Or launching a national territory strategy...

Core Markets

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Core Markets & Verticals of Specialty

1. K-12 Education

- **EdTech SaaS** for districts and state education agencies
- **Classroom management, teacher tools, and school operations software**
- **Student mental health solutions**, including AI-driven assessment tools
- **Literacy, math, and academic achievement programs**
- **Social-emotional learning (SEL) and emotional intelligence curricula**

2. School Choice Ecosystem

- **Education Savings Account (ESA) program support platforms**
 - Parent application & verification tools
 - Fintech integrations for fund disbursement
 - AI-driven customer service & parent support infrastructure
- **Policy consulting and vendor alignment** for ESA expansion

3. Workforce Development / Career & Technical Education (CTE)

- Solutions aligned with governors' priorities to connect high school students to postsecondary career pathways through:
 - Internships, apprenticeships, and certification programs
 - Tech-enabled tracking and partnership platforms

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- Workforce-aligned academic enrichment

4. Teacher Workforce Solutions

- Tools and platforms addressing:
 - Teacher recruitment and retention
 - Compensation tracking and equity analysis
 - Debt-free teacher pipeline support

5. Early Childhood & Child Care

- Platforms supporting:
 - Pre-K enrollment and family support
 - Integration of care and education services
 - Government-backed subsidy administration

6. School Nutrition & Health

- Software managing:
 - Universal school meal program eligibility and tracking
 - Mental and physical health service referrals and usage data
 - Behavioral health support in schools

7. School Safety & Cell Phone Policy Solutions

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- Emerging interest in platforms that help enforce:
 - Cell phone bans
 - Monitoring of student wellbeing through real-time behavioral cues

8. State and Local Government Sales

- Extensive experience navigating:
 - **Public procurement**, including **RFP processes**
 - State-level funding cycles and education appropriations
 - Political landscapes influencing purchasing decisions
- Consulting services to help vendors understand and break into **government verticals**, with clear go-to-market and lobbying strategies

Grassroots Advocacy Services

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Grassroots Advocacy Consulting

Turn Public Pressure into Policy Change

At **Melody McDonald Consulting LLC**, we help purpose-driven leaders, nonprofits, and citizen-led movements design, launch, and scale campaigns that change laws and shape the future. From the frontlines of state capitols to viral social movements, our approach is grounded in strategy, story, and systems that work.

This is not theory—it's personal.

As the founder of **Florida Medical Rights Association**, Melody led a seven-year fight to repeal Florida's so-called "Free Kill" law. What began as a personal mission to seek justice for families affected by medical negligence grew into one of the state's most persistent and impactful grassroots campaigns. The legislation, which had been shut down year after year, finally gained real momentum, passing the full House of Representatives and Senate with **93% approval** in 2025. The HB 6017 was Vetoed by Governor Desantis, but drew a lot of media attention and continues to be on the forefront and raises awareness for the people.

This is the power of relentless grassroots advocacy.

You can read the full legislative recap here:



<https://www.floridamedicalrights.org/single-post/legislative-recap-hb-6017-and-sb-734-the-battle-for-medical-accountability-and-due-process-in>

What We Do

Service Highlights:

- Campaign Launch Support (Website, Messaging, Group Formation)
- Legislative Strategy & Testimony Coaching

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- Viral Media & Social Trends to Drive Action
- Email/Letter Campaigns & Distribution Strategy
- Coalition Building & Advocate Training
- Data & Impact Reporting for Funders and Support

Campaign Strategy & Leadership

- Define your policy goals and build a roadmap to get there
- Design and lead statewide campaigns that get noticed, and get results
- Guide you through the decision points: when to escalate, when to negotiate, and how to hold the line

Digital Infrastructure & Messaging

- Create the foundation: websites, petitions, email campaigns, press releases, and social media
- Develop emotionally resonant messaging that transforms public outrage into organized action
- Activate your base with clear calls-to-action and consistent storytelling

Legislative Navigation

- Map the political landscape: understand committees, sponsors, and gatekeepers
- Write or refine bill language, prepare fact sheets, and support lobbying coordination
- Coach advocates on working with lawmakers while maintaining authenticity and impact

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Coalition Building

- Unite organizations, survivors, stakeholders, and influencers under a shared banner
- Facilitate collaboration, align messaging, and manage behind-the-scenes diplomacy
- Build relationships with press, professional associations, and advocacy allies

Public Testimony & Lawmaker Engagement

- Prepare advocates for powerful, respectful, and emotionally compelling testimony
- Coordinate legislative meeting schedules and prepare strategic briefing packets
- Help you become a trusted, influential voice in the halls of power

Who We Help

- Citizen activists who want to take their cause statewide
- Nonprofits seeking legislative wins or policy change
- Advocacy campaigns that need strategy, structure, and speed
- Families or communities fighting unjust laws or systemic failure

Why It Works

Most people don't know how to change the law—but they know something needs to change.

Melody does both. With lived experience as a movement founder and a proven strategist for grassroots and legislative impact, she brings emotional clarity, systems thinking, and political acumen to every campaign.

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From **a one-woman campaign in Florida to passing a near-unanimous House vote**, Melody has walked the long road—and now she helps others fast-track theirs with smart, scalable strategy.

Let's Win Something That Matters

You don't need to know the system.

You just need someone who does.

Let's build the movement that gets it done.