

B2B — Bridgeline Bookkeeping Solutions

1. **Business/Organization Name:** Bridgeline Bookkeeping Solutions
2. **Your Name:** Marcus Reed
3. **Sector:** B2B
4. **Business Stage:** 3–5 years
5. **What You Offer:** Services; Digital products
6. **Products/Services/Programs:** Monthly Bookkeeping Retainer (done-for-you books for contractors), Quarterly Profit Review Sessions, "Know Your Numbers" digital course for trade business owners
7. **Complete this sentence:** "I help plumbing, HVAC, and electrical contractors achieve clean books and predictable cash flow through done-for-you monthly bookkeeping built for the trades."
8. **Who You Serve:** Small business owners; Entrepreneurs
9. **Biggest Problem You Solve:** Not enough time; Overwhelm/disorganization
10. **Brand Colors:** Yes — Navy #1B2A4A, Steel Gray #6E7B8B, Safety Orange #E8712D
11. **Brand Voice:** Direct, Professional, Educational, Conversational
12. **Content Should Make People Feel:** Confident, Understood
13. **Mission Statement:** To give trade business owners the same financial clarity the big companies have, without the corporate price tag.
14. **Vision Statement:** (left blank)
15. **Tagline:** "Your books. Handled. Your business. Growing."
16. **Writing Sample:** "Hey Tony, good talking to you at the supply house yesterday. Look man, I went through the spreadsheet you sent and I'm gonna be straight with you: you're not broke, you're just blind. You did 340K last year and you have no idea which jobs made you money. That's fixable. Give me two weeks with your bank statements and I'll show you exactly where it's leaking. No charge for the look. Worst case, you know your numbers for the first time. Best case, we find you 20 grand. Talk soon, Marcus"
17. **Platforms:** LinkedIn, Facebook, Email list, Website/Blog
18. **Content You'll Actually Create:** Written posts, Email, Blog/Articles, Graphics/Carousels
19. **Weekly Time for Marketing:** 3–5 hours
20. **Lead Capture:** Freebie/Lead magnet (a "Job Costing Cheat Sheet" PDF), Email list, CRM
21. **What's Worked Best:** Referrals/Word of mouth; Networking/Events
22. **Primary 90-Day Goal:** New clients/customers: 6 new monthly retainer clients
23. **Primary Call-to-Action:** Book a call
24. **Top 3 Questions People Ask:**
 - 1) "How do I know which jobs are actually profitable?"
 - 2) "What can I write off that I'm probably missing?"
 - 3) "When should I hire my first employee vs. staying solo?"
25. **Design Style:** Corporate Clean

