



# Before We Start....



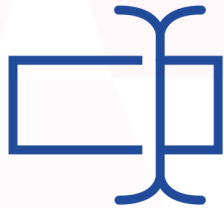
You can mute and unmute yourself throughout the session

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First name – Company Name



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We strongly encourage you to keep your video on during the session.

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# ATLANTIC – TAP DIGITAL 2024

## Day 6 – February 6, 2024

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# RECAP ON DAY 5 - FINANCE

## Dave Archer

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# CASE STUDY: Logistics

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# CASE STUDY

## LOGISTICS

You sent a shipment of short-expiry products to Istanbul. Turkey Customs informs you that there is a backlog in clearance of 4 weeks, which would cause your goods to exceed their expiry date. However, a customs official tells you he can get your shipment cleared the same day if you provide an additional \$2,000 fee.

What do you do?

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# DISCUSSION VALUE CHAIN

Maximizing international growth requires global customer and supplier networks.

What components of your network and global supply chain should be engaged to optimize your international expansion?

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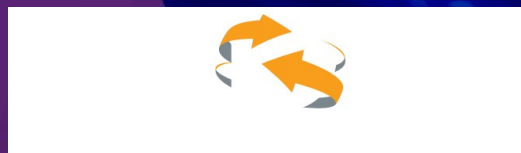


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# KEYS TO A SUCCESSFUL LOGISTICS STRATEGY INXPRESS

Robert Daigle

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# InXpress®



- Local ownership
- International partners
  - DHL, Purolator, Canpar, Loomis, Day and Ross, ABF and more
- Best of class technology
  - Ship, track, and report on-line, local shipping support and troubleshooting
- Domestic, Cross Border and worldwide Service
- More than 18,000+ customers Worldwide
- We drive costs down and increase efficiencies

Your Promise  
Our Business

## Considerations when choosing a shipping provider



### ○ Time

- Your personal time – how much time can you devote to shipping
- Transit time? What is your clients' expectations?
- Does your provider offer automated services? Do they track parcels?

### ○ Service

- Self service, or a partner
- Is consultation available, is it free?
- What other Customer service do they provide?

### ○ Cost

- Will your customers pay a premium, demand a premium service or want access to a premium service?
- Do I need the lowest cost? What does that mean for service?

### ○ Communication/Follow Up

- What happens when things go wrong? Who do I call, how much time do I have to deal with issues?

# Know your product

- **What's it made of (ingredients)?**
- **Do I have the appropriate paperwork**
  - **MSDS sheets**
  - **Commercial Invoice**
  - **Proof of Origin (FTA's)**
  - **HS Codes**
- **Are there any prohibitions or licenses required for your product?**
  - **Food items, Dangerous goods, local customs, alcohol, cannabis**
- **How does it need to be packaged?**
  - **Freeze protection? Fragile?**



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# Packaging Considerations

- Value and security
- How fragile is your product?
- Product dimensions & extra care charges
  - Generally > 60" for couriers
  - Generally > 8' for trucking companies
- Dimensional weight
  - The smaller the better
  - Carriers charge of a combination of weight and size



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***InXpress***<sup>™</sup>

# Quick Comparison of Shipping Options

	Transit Time	Volumes and Size	Cost	Service
<b>Air</b>	Fastest	Small and Minimal	Most	Quick/Easy
<b>Truck/Rail and ground</b>	Medium	Small, Medium to Large	Medium	The most complex
<b>Ocean</b>	Slowest	Large Volumes	Least	Unknown riskier, many people involved

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# Shipping Options

- Small Parcel (under 150lbs)
- Less than Truck load (LTL)
- Full Truck load (FTL)
- Air Cargo
- Ocean Cargo Full Container (FCL)
- Ocean Cargo Less than Container (LCL)



15  
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## Trucking and Ground Services

- Small Package Couriers
- Less than Truckload (LTL)
- Partial Truckload
- Full Truck Load (FTL)
- Flat deck
- Refrigerated (Reefer)



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# Transit Times Ground and Freight

- Transit times are always ESTIMATES
- Slow – 5 to 7 days to southern USA
- Limited tracking, and very inconsistent by individual carrier
- Usually, no guarantees on shipping times
- Worldwide logistics challenges



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# Customs – Use a Broker

- Border Delays
- Self-clearing
  - All shipments are checked and scrutinized
  - Often many errors, result in delays
  - Bonded storage until resolved – costly and timely.
  - Requires proper experience
- A good customs broker saves you time, headaches and money



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## Additional Charges

- **Accessorial Fees**
  - **Guaranteed delivery**
  - **Power tailgate**
  - **Inside delivery**
  - **Residential pick up or delivery**
  - **Scheduled pick up or delivery**
  - **Limited Access - Schools, Hospitals, Prisons, Tradeshows, Construction sites, etc**
- **Re-Classifications or Re-weighs**
  - **Know your Class(es) & NMFCs (US)**



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Ocean  
Shipping

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# Advantages and Risks

## Advantages

- Cheapest mode for transporting goods
- Can move large amounts of product
- Tip – Supplement with other modes of transportation

## Risks and Challenges

- Rough Seas
- Longer timeframe means more time for problems
- No Tracking
- Extremely slow



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# Air Shipping



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# Advantages and Risks

## Advantages

- Fastest way to ship
- Full tracking
- Lower risk for damage (less hands touching product)
- Bill customer quicker
- High Customer Satisfaction

## Risks and Challenges

- Costly
- Dangerous Goods can be problematic



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# Recommendations

- Find a Logistics Consultant – they can help
- Find a Customs Broker (account).
- Know your product and requirements to Import/Export
  - Talk to regulatory bodies (CBP, CBSA, Health Canada, etc.)
  - Prepare or get (if importing) all the necessary documentation
- Send test/samples shipments prior to full roll out
- Start small to minimize costs
- Webship platforms make things easy
  - Make sure the provider provides good support
- Don't leave shipping to the end
  - Your business is too important



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# The Export Checklist

- **Do I have a good customs broker?**
- **Do I know my product? (NMFC, Country of Origin, HS Codes)**
- **Do I have all the necessary documentation?**
- **Should I outsource or handle it myself?**
- **What's the right mode(s) of transport for my clients?**
- **Who will provide me and my customer with the best experience?**
- **Should I insure the packages?**
- **Do I have the right packaging in place?**
- **Can I track and trace my shipment to its destination?**
- **How do I resolve issues?**

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# Q & A

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MARKETING LOCALIZATION  
 BRAND AWARENESS BUILDING  
 DIGITAL MARKETING  
 ECOMMERCE  
 Heather Brewer SYMPPLICITY DESIGNS

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# Marketing that Matters

# The Marketing Funnel



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**Awareness/Interest  
(Acquisition)**

TV, Radio, Out-of-Home, Events,  
External blogs, Outside  
recommendations, Paid social  
ads, Paid digital display ads

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**Consideration/Evaluation  
(Acquisition)**

Organic social media, emails,  
newsletter, Website

---

**Decisions/Purchase  
(Acquisition)**

Paid Search, Website

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**Repeat/Loyalty  
(Retention)  
Loyalty (Retention)**

Organic Social, Email,  
Newsletter, Surprise and Delight  
Organic Social, upgrade offers,  
surprise and delight

---

**Advocacy (Retention)**

---

Outreach, special offers, gifts



# How Channels fit in the Funnel

# Why it Matters

- ▶ Customers need between 5-20 (with the agreed upon average being 12) touchpoints to move through the funnel from awareness to a purchase.
- ▶ Different messaging for each stage of the funnel is required
- ▶ While ROI is harder to measure for channels higher in the funnel, they are required to move potential customers to conversion - we can't start at the bottom.





# Digital Marketing

- ▶ Paid vs. Organic Social media - awareness and conversion vs. brand engagement
  - ▶ Organic social media is not a sales driver.
- ▶ Digital Display ads
- ▶ Google ads
  - ▶ These are conversion ads
- ▶ SEO
  - ▶ Determines where you show up on Google based on keyword queries
- ▶ Blogs
- ▶ Email
- ▶ Website content

# Building Brand Awareness

- ▶ Before you start to think about brand awareness, you first need to have a strong handle on your brand, your customer, and your competition. A brand DNA exercise is a great place to start
- ▶ While many associate the awareness part of the funnel with pricey advertising campaigns, there are low-budget alternatives
  - ▶ Hijacking traffic (Google ads)
  - ▶ Strong SEO
  - ▶ Leveraging the popularity of others
  - ▶ Events/Awards
  - ▶ Earned media



# Brand DNA

- ▶ Who are you? What problem do you solve?
- ▶ Who is your customer?
- ▶ Who is the competition?
- ▶ What is your positioning statement?
- ▶ How are you different?

# Who are you?

Creating a brand persona, visual identity, and tone is key to brand health, brand recall, and affinity. This is our Brand DNA... So who are you?

- ▶ Visual Brand Identity
- ▶ Brand Voice
- ▶ Brand Values
- ▶ Brand Message
- ▶ How do we want people to feel
- ▶ Our Story
- ▶ Brands we admire



# Who is your customer? Building an avatar

- ▶ Before we can start marketing, it is crucial that we understand who we are marketing to. This doesn't just mean demographics, but also psychographics
- ▶ What are their goals?
- ▶ What's important to them?
- ▶ What are their values?
- ▶ How do they prefer to receive information?
- ▶ What are their pain points?
- ▶ What are their barriers to purchase?

# Positioning

The old method was “We create (blank) for (blank) so they can (blank). These were often drafted, tucked in a drawer, never to be seen again.

April Dunford drafted a new model in her book “Obviously awesome” that is much more useful to an organization.

- ▶ How do you solve a problem for the customer?
- ▶ How do you do it better than the competition?
- ▶ Who is the market that cares?
- ▶ Now bring it all together in one statement

# The Competition

- ▶ How does competition represent themselves in the market? What brand characteristics to our competitors have?
- ▶ Difference mapping helps us understand where we play in the market.
- ▶ Bernadette Jiwa has an excellent template

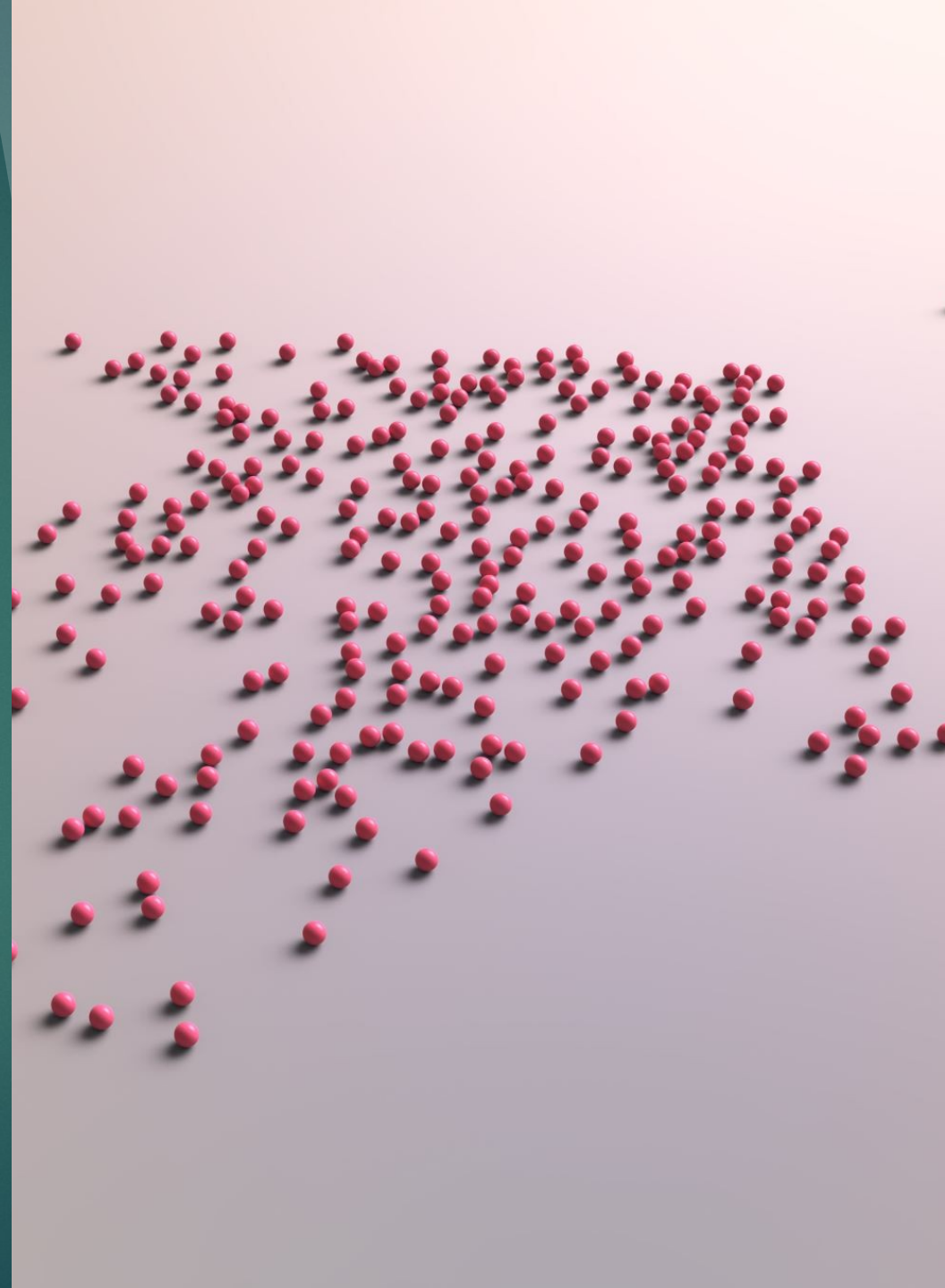


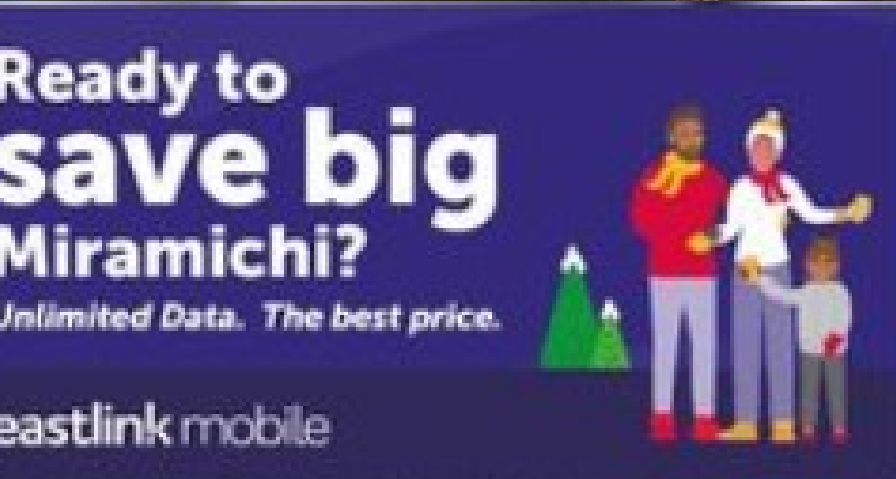
# Difference Mapping

- ▶ **Purpose:** Why do we exist?
- ▶ **People:** Who is this for?
- ▶ **Personal:** How can we help people live better lives
- ▶ **Perception:** What do they believe?  
What do we want them to believe?
- ▶ **Product:** What do people really want or need? How do we create that value?

# Localized Marketing

- ▶ Localized marketing is all about connecting with your audience using language and visuals that resonate with them.
- ▶ It is also critical to understand how your market prefers to interact with brands
- ▶ Images of local landmarks, references to local cuisine, leveraging local slang, even throwing the name of the region into the creative.
- ▶ Large companies will often have dozens of iterations of the same campaign creative, adjusting only the local references.





# Localized Marketing Examples



# e-Comm considerations and challenges



A full-view marketing strategy is a must: How are you driving customers from the top of the marketing funnel to the bottom?



Do you understand how your audience interacts with your website



Are you familiar with tiered paid social ads?



Does your site have a pixel?



Do you encourage additional point of sale purchases?



Do you understand the pain points of the customer both in using the site and in completing their purchase?



# Do you Know the Score

- ▶ How are you tracking your success?
  - ▶ Identify the metrics that matter
  - ▶ Develop dashboard to track wins and losses
  - ▶ Observe trends over time
  - ▶ Key metrics to track to measure overall funnel health:
    - ▶ Ad clicks/Reach/Impressions
    - ▶ ROAS/CPC
    - ▶ Followers
    - ▶ Engagement
    - ▶ Web visits/time on site/bounce rate
    - ▶ Email open rate/CTR
    - ▶ Conversion rate/abandoned carts/average ticket



# Q & A

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# BREAK

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# WORKSHOP: Process & Logistics

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# WORKSHOP PROCESS & LOGISTICS – GROUP 1

How could your business processes give you a competitive sales advantage against competitors?

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## WORKSHOP

# PROCESS & LOGISTICS – GROUP 2

You have just discovered that one of your shipments has been detained at customs in the destination country.

1. Create a list of the possible causes of this.
2. What measures can you take to avoid similar problems in the future?

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# WORKSHOP PROCESS & LOGISTICS – GROUP 3

What are the biggest challenges facing transportation and logistics of any product?

What are the biggest logistical challenges when providing service in another country?

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## WORKSHOP

# E-COMMERCE DISCUSSION

E-commerce is now a fundamental part of most companies' growth strategies.

What are the key logistical elements of e-commerce you need to take into consideration if you choose that market entry method?

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# SCALING EXCELLENCE: PROCESS AS AN ACCELERATOR

## SYMPPLICITY DESIGNS

# Matt Symes

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**Scaling Excellence:**

**Process as an  
Accelerator**



# Thank you!

## THE MAN IN THE ARENA

“IT IS NOT THE CRITIC WHO COUNTS; NOT THE MAN WHO POINTS OUT HOW THE STRONG MAN STUMBLES, OR WHERE THE DOER OF DEEDS COULD HAVE DONE THEM BETTER. THE CREDIT BELONGS TO THE MAN WHO IS ACTUALLY IN THE ARENA, WHOSE FACE IS MARRED BY DUST AND SWEAT AND BLOOD; WHO STRIVES VALIANTLY; WHO ERRS, WHO COMES SHORT AGAIN AND AGAIN, BECAUSE THERE IS NO EFFORT WITHOUT ERROR AND SHORTCOMING; BUT WHO DOES ACTUALLY STRIVE TO DO THE DEEDS; WHO KNOWS GREAT ENTHUSIASMS, THE GREAT DEVOTIONS; WHO SPENDS HIMSELF IN A WORTHY CAUSE; WHO AT THE BEST KNOWS IN THE END THE TRIUMPH OF HIGH ACHIEVEMENT, AND WHO AT THE WORST, IF HE FAILS, AT LEAST FAILS WHILE DARING GREATLY, SO THAT HIS PLACE SHALL NEVER BE WITH THOSE COLD AND TIMID SOULS WHO NEITHER KNOW VICTORY NOR DEFEAT.”

*Theodore Roosevelt*

# Matt Symes

BA/BEd, MA, PhD (ABD – on Hold)

CEO, Symplicity Designs  
President, United Sign & Trimline  
Advisor, Smarter Spaces  
Board Member / Investor, Mycodev Group  
CEO, Sympli Scaling  
Owner, Symes' Realty (Real Estate Holding Co)

Over the past 8 years, Matt Symes has worked with over 400 businesses to help them understand the Principles, Methods, and Tools of High Performing Organizations

Matt has been personally involved with more than 35 Deep Transformations helping organizations Get out of Crisis or go From Good to Great.

## A Couple Highlights:

Helped to turn around **The Francophone Education System** in New Brunswick (4 years later - Fastest Improving in Canada, 8<sup>th</sup> fastest in the world, Fastest among Francophone school systems)

Helped **an owner to a 5m exit**, when 3 years earlier her business was worth not more than 200k - 36 months earlier.

Helped David Savoie, 3<sup>rd</sup> generation family business owner, take **Acadian Construction from 42m to 180m in 18 months.**



# FORTUNE

JUNE 2019

FORTUNE.COM





## IRRELEVANCE

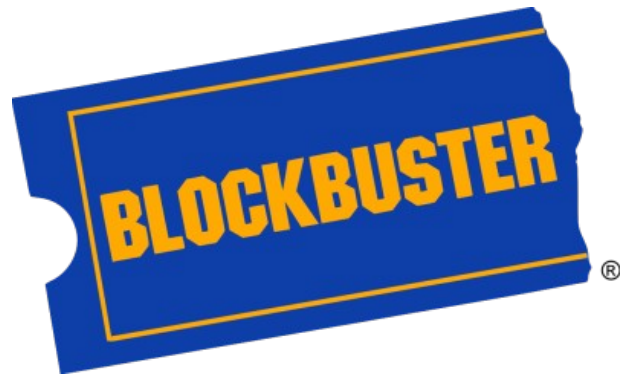
**Irrelevance** happens when **the speed of change outside** an organization is greater than **speed of change** inside an organization.

Rick Warren

”

# THE NEED TO CHANGE

**SEARS**





## 2 Lessons

Only 10% of Change  
Succeeds

The Only constant is  
Change

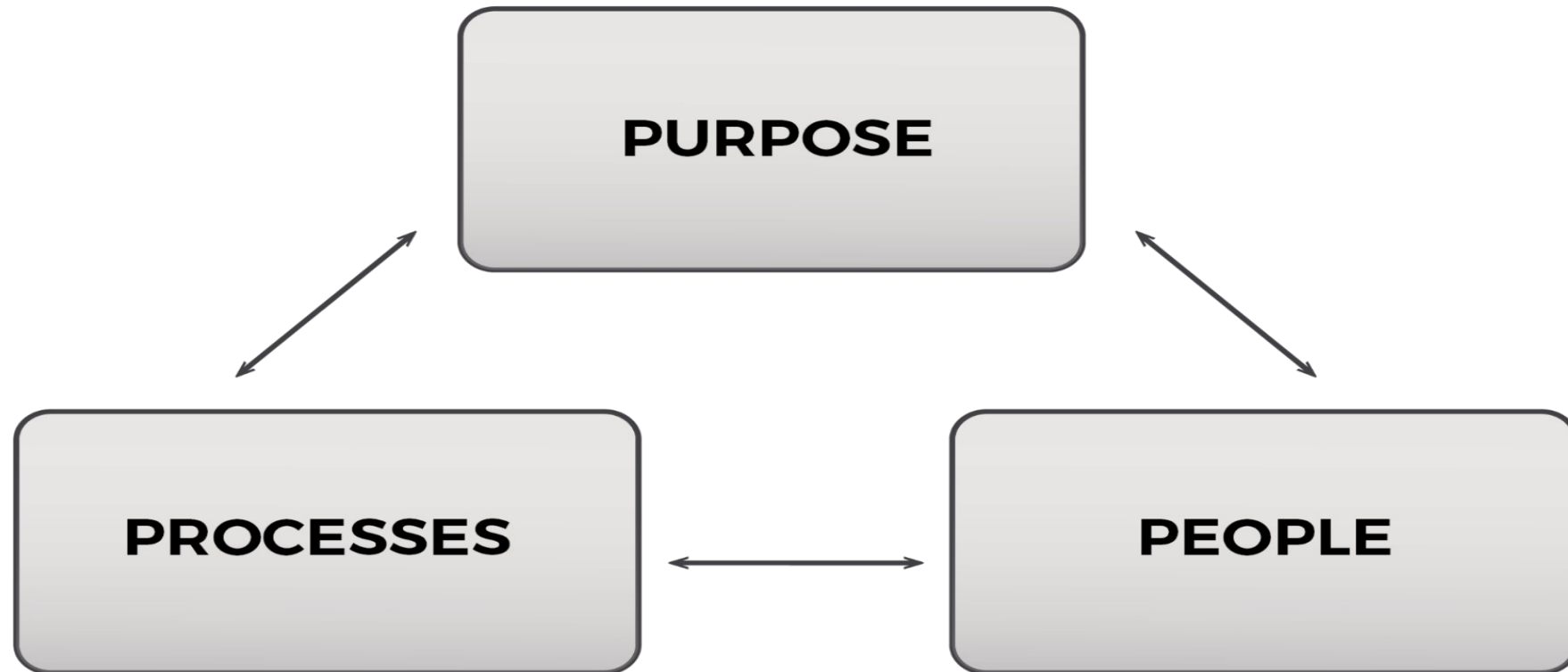




**Those who really succeed  
play a different game**

# SIMPLIFIED VIEW OF AN ORGANIZATION

Purpose, Process, and People



What is your  
organization's most  
valuable asset?



# OUTSIDE IN

Dave Ulrich

Author, Professor  
& Speaker  
**(Ross School of Business)**

Books

- **HR From the  
Outside In**



# KEY PRINCIPLES

1. Customer #1 Asset – Outside in

# The Customer's Chair

amazon



Symlicity  
Designs 

# KEY PRINCIPLES

1. Customer #1 Asset – Outside in





**WHAT  
PROBLEM**

*Are we*

**SOLVING?**

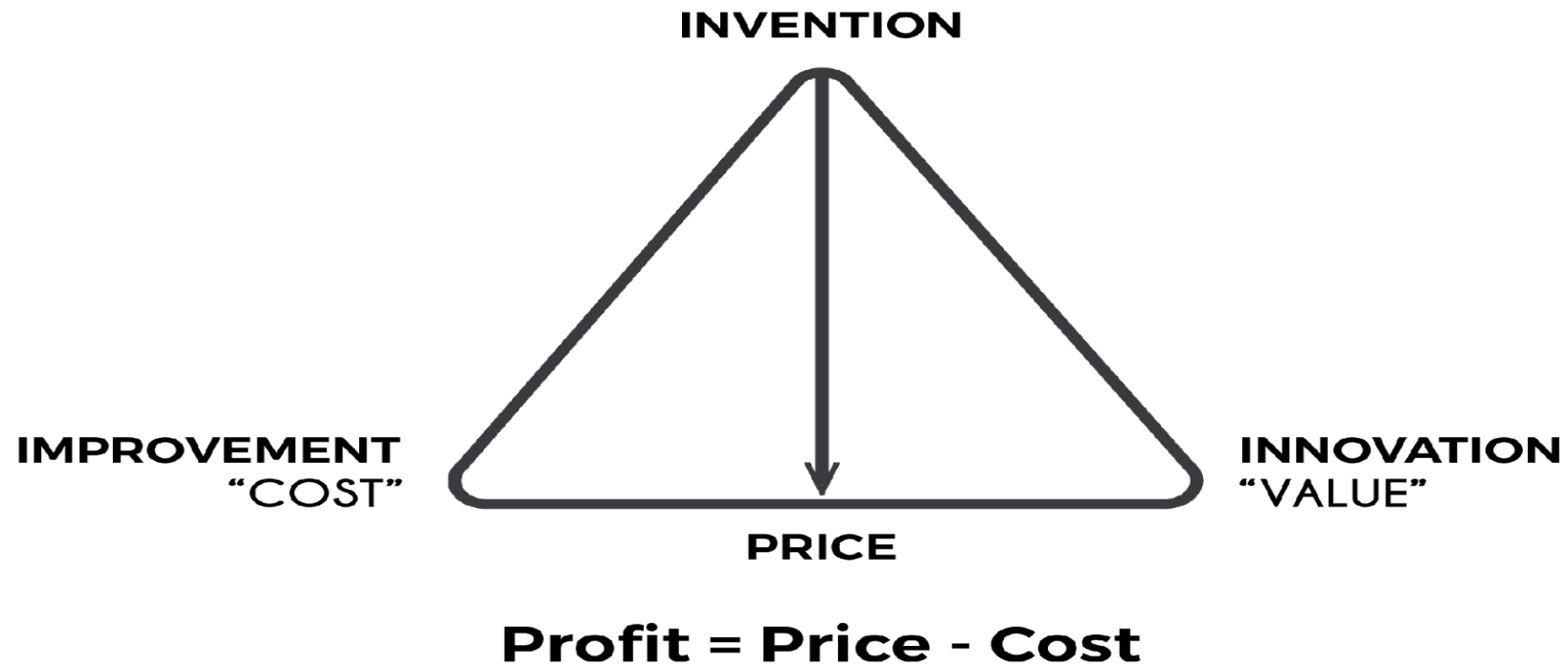
**What is the job to be done?**



**What problem is being solved?**



# The Value Triangle



# What are you terrible at in the service of great?

Most important to SWA target market



Least important to SWA target market

Low prices

Friendly service

Frequent departures

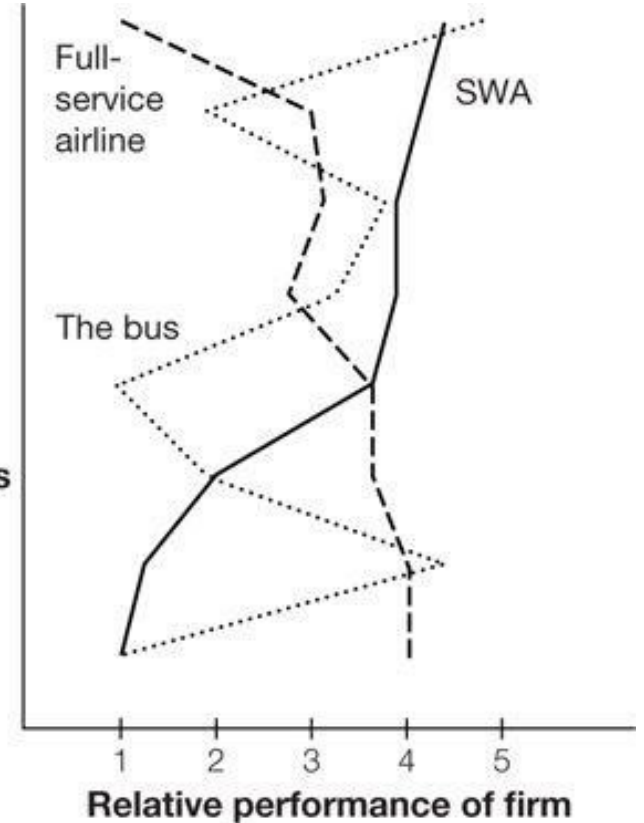
On-time arrivals

Fast transport

Convenient airports

Extensive network


On-board amenities



## **Principle #2**

When it all goes wrong where does the blame go?





85%-96% of your Problems,  
Challenges, and  
Opportunities will be  
process issues.

# KEY PRINCIPLES

1. Customer #1 Asset - Outside in
2. 85%-96% of your PCOs are process issues not people issues





# KEY PRINCIPLES

1. Customer #1 Asset — Outside In
2. 85%-96% of your PCOs are process issues not people issues
3. Leaders need to create the environment for People to be OWNERS



# Process as an Engine

# Process as an engine

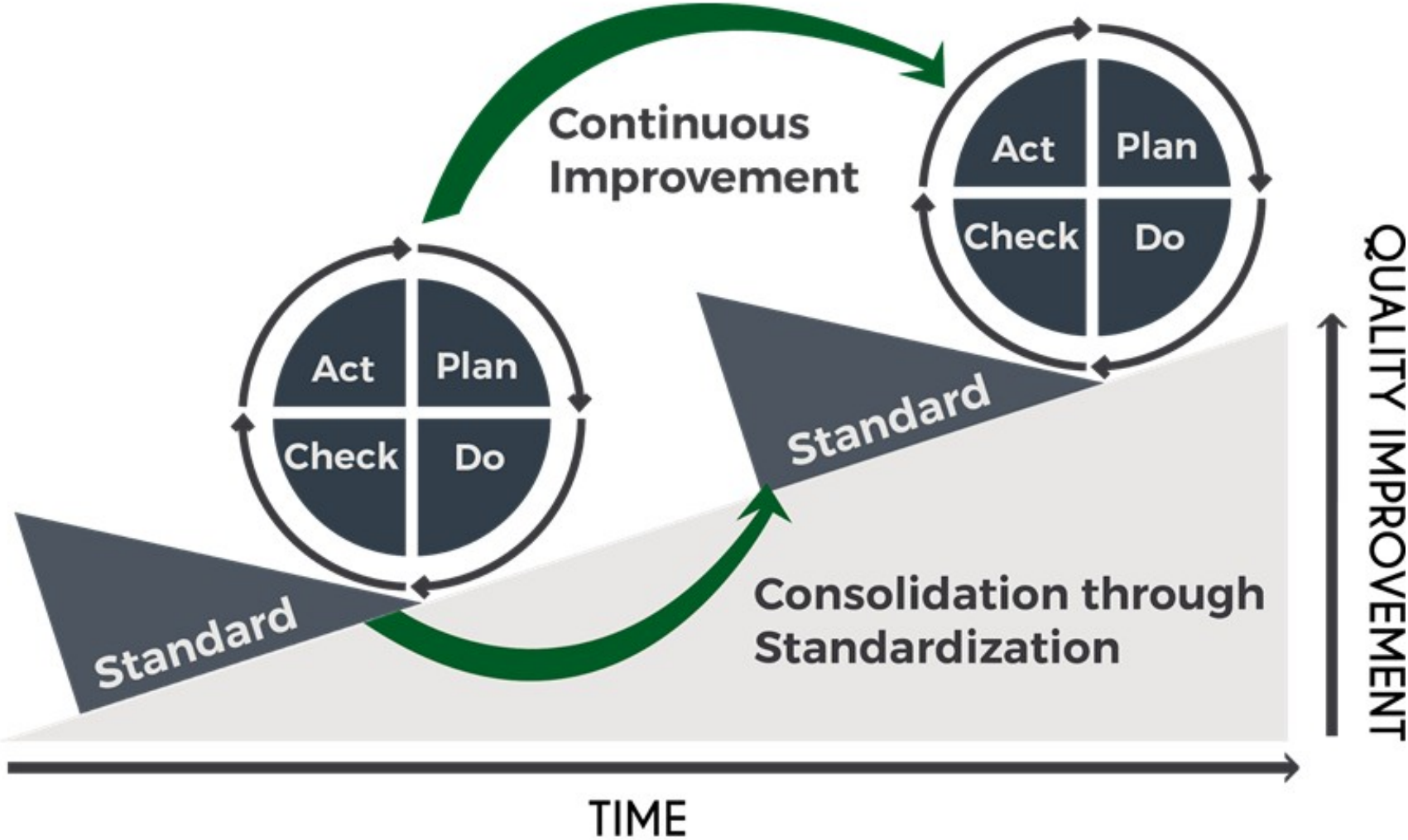
If you can't describe what you are doing as a process, you don't know what you are doing.  
- Edwards Demming



# The Sales Process



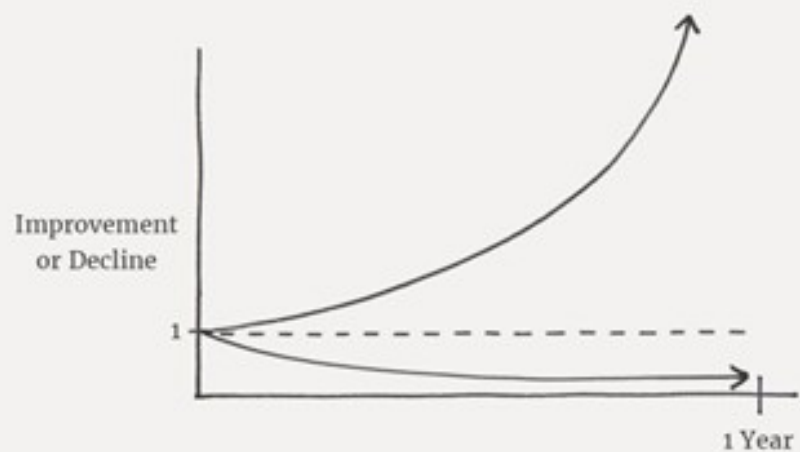
# Anchor it with Daily Management: Plan – Do – Check - Act



# Make the process 1% Better every day

## The Power of Tiny Gains

$$\begin{aligned} \text{1\% better every day} & \quad 1.01^{365} = 37.18 \\ \text{1\% worse every day} & \quad 0.99^{365} = 0.03 \end{aligned}$$





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# Q & A

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# SURVEY – DAY 6

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# EXPORT PLAN FOCUS

# Digital Marketing & Supply Chain Management

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# Tomorrow's Topics

- Approaching New Potential Prospects
- Managing International Distribution Channels
- The Huddle - What Keeps You Up at Night?
- Export Plan – All the rest! + Executive Summary
- The Final Plan
- Mentoring

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