Stone Soup Strategy

New Client Welcome Guide

What to expect as we begin working together.

Clarity. Structure. Confidence.
We're here to help you move forward with purpose.

Strategic thinking.
Grounded in purpose.
Built for impact.

www.stonesoupstrategy.marketing | david@stonesoupstrategy.marketing

Stone Soup Strategy

Welcome to Stone Soup Strategy

We're glad you're here. We know you have choices, and we appreciate the trust you've placed in us.

At Stone Soup Strategy, we bring structure, clarity, and a thoughtful process to complex challenges—so you can move forward with confidence and focus.

This guide is here to make our work together simple, transparent, and effective from day one.

What this guide is for

This guide gives you an overview of how we work, what you can expect, and how we'll collaborate to achieve meaningful results together.

OUR GOAL: TO MAKE THE PROCESS SIMPLE, TRANSPARENT, AND ALIGNED.

How we work

We follow a clear, proven process that turns complexity into clarity and insight into action.

1 **DISCOVERY**
We listen deeply to understand your goals, challenges, and context.

2 **SYNTHESIS**
We analyze, connect the dots, and uncover key opportunities.

3 **STRATEGIC OUTPUTS**
We deliver clear, practical recommendations you can act on with confidence.

What you can expect

A partnership built on clarity, communication, and momentum.

- Clear communication and regular updates
- Thoughtful analysis and insight
- Focused recommendations that drive results
- A partner invested in your success

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How the Engagement Works

A collaborative, step-by-step process designed to bring clarity, create alignment, and drive meaningful impact.

1. Discovery

We learn your business, your audience, and your goals. We ask good questions and listen closely.

2. Synthesis

We distill insights, identify patterns, and clarify what matters most.

3. Positioning

We define your unique position in the market and the value you deliver.

4. Messaging

We craft clear, compelling messages that connect with your audience and reflect your position.

5. Narrative

We shape your story—the context, the proof, and the flow that brings your message to life.

6. Systems

We build the foundational assets and frameworks that make your strategy repeatable and scalable.

7. Execution Support

We support you as you roll out your strategy, refine what matters, and drive results.

Structured, but not rigid.

We follow a proven process, tailored to your needs.

Strategic, but practical.

We focus on what creates real impact—then help you make it happen.

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Working Together

Stone Soup Strategy

Great strategy happens through partnership. Here's what to expect from working together—and how we'll make the process clear, collaborative, and productive.

What I'll need from you

Share your existing materials, key context, and timely feedback. The more candid and complete you can be, the stronger our strategy will be.

Communication & feedback

We believe feedback drives better ideas. We'll check in regularly, ask smart questions, and incorporate your input at the right moments.

How we work

We synthesize—we don't just collect. We take what you share, connect the dots, and shape it into a clear, strategic direction. You bring the insights. We bring structure and perspective.

A collaborative process

This is a partnership, not a handoff. We'll align early, move deliberately, and keep the process focused—so you spend less time untangling and more time moving forward.

Our goal:
To bring clarity, reduce confusion, and create strategy that moves you forward.

Materials to gather

To get started, please share anything relevant. Here's a helpful checklist:

- [ ] Website (URL or screenshots)
- [ ] Current deck or investor pitch
- [ ] Current messaging or positioning
- [ ] Audience or customer notes
- [ ] Product/service overview
- [ ] Brand guidelines or assets
- [ ] Recent plans, reports, or research
- [ ] Any other relevant background materials

Not everything will be needed, but everything helps.

Next steps

Once we receive your materials, we'll review, ask any clarifying questions, and confirm our plan of action. You'll hear from us within 3 business days.

We're excited to partner with you and help turn complexity into clarity.
Have a question or something to share? *We're here—just reach out anytime.*

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