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Marketing Plan: Probate for Dummies

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Abstract

The aim of this study is to define the most appropriate marketing strategy, as well as develop a marketing plan to increase brand recognition, for a newly created Brazilian company called Probate for Dummies, which operates in the online resale of inherited assets. Primary data that provide the basis for this study were generated through semi-structured interviews, while secondary data were collected from the review of public documents, company's website, and bibliographical research. The sample of this study was formed by four elements, being the first one the owner of the company, followed by three specialists in different areas of knowledge which may directly influence the business, in this case a lawyer, a psychologist and real estate broker. Thus, it was possible to interpret the way the company's relationship with its environment, as well as identifying the intention of market positioning and future actions intended. As for the main outcomes, this project unfolds the key factors of both micro and macro environments of the company, in the form of a SWOT and PESTEL analyses, as well as the analysis of the Porter's five competitive forces. In the sequence, a marketing central strategy was delineated through the market segmentation, target selection and positioning definition, which guided the marketing objectives to be pursued. Thereafter, based on those marketing objectives, a marketing mix was composed based on the 7P's (Product, Price, Placement, Promotions, People, Process, Physical Evidence). Furthermore, an operational plan composed by specific actions addressed to each marketing goal was settled, along with the budget and schedule of implementation. Regarding the conclusions, a market penetration strategy shows to be the most suitable for this business, with development of new services for the costumers of the niche it acts. Yet, the strategy is intensively based in terms of promotion, especially in segmented digital marketing.

Keywords: Marketing Plan, Digital Marketing, Services Marketing, Probate

Resumo

O objetivo geral deste estudo consiste em definir a estratégia de marketing mais apropriada, bem como elaborar um plano de marketing visando aumentar o reconhecimento de marca, para uma empresa brasileira recém-criada e designada Inventário para Leigos, que atua no setor de revenda online de bens herdados. Os dados primários que servem de base para este estudo foram gerados através de quatro entrevistas semiestruturadas, já os dados secundários foram coletados a partir da revisão de documentos públicos, website da empresa, e pesquisa bibliográfica. A amostra deste estudo foi composta por um elemento, sendo este o proprietário da empresa. Dessa forma, foi possível interpretar a forma como a empresa se relaciona com o ambiente envolvente, assim como identificar a intenção de posicionamento de mercado e ações futuras pretendidas. Quanto aos resultados, este projeto desdobra os fatores-chave que compõem o micro e macro ambientes da empresa, na forma das análises SWOT e PESTEL, acompanhadas da análise das Cinco Forças Competitivas de Porter. A estratégia central de marketing foi delineada por meio da segmentação de mercado, seleção do mercado alvo e definição do posicionamento, que orientaram os objetivos de marketing a serem almejados. Assim, baseado nesses objetivos, o mix de marketing foi composto com base nos 7P's (Produto, Preço, Distribuição, Comunicação, Pessoas, Processo e Evidências Físicas). Além disso, estabeleceu-se um plano operacional, composto por ações direcionadas a cada objetivo de marketing, juntamente com orçamento e o cronograma de implementação. Em relação às conclusões, verifica-se que a estratégia de penetração de mercado é a mais adequada para este negócio, com desenvolvimento de novos serviços para os clientes do nicho em que esta nova atividade se desenrola. Sublinhe-se ainda que a estratégia de divulgação deve ser intensamente alicerçada em ações de marketing digital altamente segmentado.

Palavras-chave: Plano de Marketing, Marketing Digital, Marketing de Serviços, Inventário

To my parents, for their unconditional support.

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Acronyms

AI – Artificial Intelligence

AICEP – *Associação Internacional das Comunicações de Expressão Portuguesa*

GDP – Gross Domestic Product

IBGE – *Instituto Brasileiro de Geografia e Estatística*

IoT – Internet of Things

IT – Information Technology

KPI – Key Performance Indicator

PESTEL – Political, Economic, Social, Technological, Legal and Environmental

SMART – Measurable, Achievable, Relevant, and Time-Bound

STP – Segmentation, Targeting and Positioning

SWOT – Strengths, Weaknesses, Opportunities and Threats

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Introduction

The online real estate resale and the online second-hand goods trading segment are greatly explored markets and with well stablished players, with decades of experience in these segments, however, from the point of view of a new online business called Probate for Dummies, there is the still room for exploring a new market segment, which is implicitly embedded within those two previously mentioned, namely this would be the market of online trading of inherited assets in Brazil. In this context, the new start-up considers that with the appropriate marketing strategy, it is possible to develop and explore a promising market, and that it has potential growth and profitability, especially for the company that takes the first action and recognizes the hidden potential of this market. Despite of having low resources and being in its early of development, the company believes that with a noticeable propose and vision for the future, the internet era makes it possible for an entrepreneur to start developing a new digital business, and attempt to conquer, even in a slowly pace, a position among the competitors.

Thus, it is under such circumstances that this research presents its relevance, and seeks to answer questions such as "What is the efficient way to practically apply the marketing theories for a new and

small business and with limited resources?" or even "How to define a marketing plan for a company at is in an early stage of its existence, but with a very broad target audience and in a country as big as Brazil?".

Therefore, to try to answer these questions, and considering the context already presented, the main objective defined for this study is to define the most appropriate marketing strategy, as well as develop a marketing plan to increase brand recognition, of a newly created Brazilian company called Probate for Dummies, which operates in the online resale of inherited assets.

To support this study, the collection of primary data occurred through four semi-structured interviews, which were applied to the owner of the company and to specialists from three different areas of knowledge (a Lawyer, a Psychologist, and a Real Estate Agent), which are believed to provide essential insights regarding the analysed topic. The content of these interviews was recorded, transcribed, and processed for further qualitative analysis. In addition, secondary data was collected from the review of public documents, the company's website, and bibliographic research.

The present work has been structured in four sections, in addition to the present introduction. The first section does a presentation of the literature reviewed, where the main theoretical models and concepts that contribute to solving the question of this study are described, such as the marketing concept and some of its aspects, such as service marketing, marketing strategy, marketing-mix, and marketing plan proposed structuring. The second section details the methodology applied in the development of the study, as well as the details about the exploratory interviews, study sample, data treatment and analysis procedure. Following, the third and fourth sections show the results of the analysis of the interviews, and the marketing plan developed for the company, respectively.

It is from the combination of the theoretical framework reviewed in section one, together with the empirical content from the interviews explained in section two, in addition to the collection of secondary data, that this study will have the basis for achieving the established objectives, as the results presented and discussed in section three.

Lastly, the accomplishments of this work and conclusions of all the data that was created and analysed during the accomplishment of this study are presented, together with the possibility of new guidelines for future studies and possibilities of new research that were identified during the development of this study project.

1. Literature Review

1.1. Marketing concept

Despite the fact of the word Marketing being relatively recent, the activity it represents have long-term origins, many ancient civilizations already used some forms of advertising, using signs and information to show events or services, although it was only between 1910 and 1940 that the first marketing concepts emerged, made official with the creation of the Journal of Marketing in 1936 and the American Marketing Association in 1937, which focused on commerce and distribution (Toledo & Moretti, 2016).

At that time, and until the decade of 1950, Marketing activities were primarily sales oriented, in other words, the success and effectiveness of the marketing activity was measured in the impact it generated in the volume of revenues, in other words, the goal of Marketing was to sell what the company produced and persuade customers to buy it (Webster, 1988). It is noticeable that consumers were not the starting point for which Marketing was looking (Tadajewski, 2009).

It was near the end of the 60´s that it was understood that Marketing was something more than the sale of toothpaste, soap and steel, it started therefore to include the terms like organization, people

and customers (Tadajewski, 2009). So, the concept of Marketing would be considered as a discipline to all organizations, as soon as they had customers and products (Bell & Emory, 1971). At this stage, Kotler defined Marketing as the ability to conceive the business to serve the consumer's interest and stated that the key to achieving business goals is the ability to determine the needs and desires of target markets, in this sense, the key is Marketing (Toledo & Moretti, 2016). Thus, the customer was incorporated and recognized as a central point of Marketing for the first time.

The ideas of exchanges and mutuality between consumers and the business were later included in the concept of Marketing, when Kotler (1972) redefined the concept, which would then encompass the understanding of all transactions between an organization and all its audiences. When Wilkie and Moore (2007) analysed this change in detail, they pointed out the pertinence of the exchange as something inherent to Marketing. Following the same line, Nickels and Wood (1999) consider that marketing is the process of establishing and maintaining mutually beneficial exchange relationships with customers and other interest groups.

From the late year of the 1980 decade, a pertinent fact changed in paradigm of organizations, especially in the United States, since it went from an industrial and consumer goods production oriented to the predominance of service companies (Wakefield, 1993). Furthermore, the organizational structure itself changed to horizontal hierarchies, marked by multi-functional management and concepts of empowerment of employees (Svensson, 2005). All of these changes were accompanied by an acceleration of global competition, as well as a significant reduction in production cycles associated with just-in-time methodology (Svensson, 2005). Therefore, in order to follow the increasing complexity of the period, it became necessary to redefine the concept of Marketing.

Shawchuck et al. (1992) provided the most suitable definition of that period, where it is evident the factor of competition incorporated into the concept, compared to the previous definitions, according to the authors the fundamental change is that for a company to achieve its goals, it should be able to deliver the desired satisfaction to its target markets more effectively and efficiently than its competitors.

Certainly, the concept of Marketing evolved over time and today its importance is recognized within the business organizations, currently the customer and their needs are considered as the focal point of marketing concepts, as Kotler and Keller (2016) define, it is the human activity directed to satisfy needs and desires through an exchange. In the same sense, marketing is understood by Caetano and Andrade (2003) as a form of management with the objective of satisfying customer needs. For McDonald (2008), the fundamental purpose of marketing is the correspondence between the resources of a company and the needs of consumers to achieve the objectives of both. Costa and Crescitelli (2003) complement this idea by describing that marketing is to build, cultivate and develop the existing relationship with consumers in order to reach profitability, based on common objectives of the parties involved.

Some authors to include the idea of values generation in their concepts of marketing, for instance, Armstrong et al. (2014) states that marketing is managing profitable customer relationship and it aims

to create value for customer and capture value from customer. Reinforcing this idea, Kotler and Armstrong (2014) define marketing as an administrative and social process by which individuals and groups obtain what they need and want, through the creation, offer and exchange of products and value for the others.

In recent years, marketing is seen in a broader and global way more than ever, in the current concepts the entire business, its processes and activities altogether are guided and works through marketing, as well as its effect being directed not only the consumer, but to the society as a whole, as seen in the concept approved in 2013 by the American Marketing Association, which defines Marketing as the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large.

The concept of marketing took 70 years to evolve from the initial product-driven orientation to the human centric perception, however in the last decade as the world started to move towards the digital media and social networks, it was inevitable for the marketer to pivot, to follow the course of technological innovations, thus adapting its frameworks in order to serve customers in the hybrid of physical and digital stages of the new buying journey (Kartajaya, et al., 2016). Nowadays, with technologies such as artificial intelligence (AI), big data analysis, internet of things (IoT) and augmented reality becoming mainstream, companies start to unleash the full potential of the use of tech-driven marketing in its strategies and operations (Kartajaya et al., 2021). By speeding up the decision making based on big data and creating value for the customer in an individual and customised level, marketing has become now more predictable and cost-effect than ever, but still with the fundamental concept of the human as its essential base (Kartajaya et al., 2021).

1.2. Services marketing

Similarly, to the marketing of products, when thinking about services marketing we can say that the main goals pursued are to identify and fulfil the desires of the customer, thus creating value for all parts involved. However, when there is no tangible product, things become subjective and abstract, and that is the essential challenge of service marketing (Darmawan & Grenier, 2021).

The difficulty when talking about service marketing starts while trying to define what is a service, since there are many interpretations regarding the concept, and although within the academic literature, multiple designations have been proposed, there is still no consensual definition of the concept (Mustafa et al., 2021). According to Zeithaml (2006) this diversity of definitions might generate controversy when the topic is addressed.

For Flipo (1988) the distinction between a product and a service is not always perfectly clear, for the author, many services incorporate at least some goods aspects, as well as most goods at least offer a delivery service. In general, goods can be defined as objects, devices, or things, while services are defined as actions, efforts or performances, in addition services, unlike goods, are not physical products and they cannot be touched (Flipo, 1988).

In the same sense Bowie et al. (2016) claim that services can be explained as intangible goods, which means they cannot be heard, seen, smelled, tasted, or touched, before being purchased. Likewise, for Zeithaml et al. (1985) an important conclusion about services is that services are performances, and they cannot be experienced in the same manner in which goods can be sensed. Consequently, for the authors, service businesses can be considered as relationship-based businesses.

Grönroos (2007) provides a more complex and broad approach to the subject by saying that a service encompasses a series of activities that arise through numerous interactions between the customers, structures, human resources, goods, and supplier´s systems, and the set of these interactions are intended to meet a customer's need. The author also includes that from the consumer's point of view, there is no difference between goods or services, as the end consumers are interested in the benefits that will be provided to them as result of the acquisition.

Lovelock and Wirtz (2016) present a distinct and interesting point of view, for both authors it is safe to characterize services as economic activities offered and exchanged between interested parties, where for the exchange of money, time and effort, the customer of the service expects value, from access to goods, work and professional skills, facilities, networks and systems, but the crucial difference is that generally they do not own any of the physical elements involved. With a common perspective, Kotler and Armstrong (2014) indicate that a service is basically intangible and does not result in ownership of something, in other words, it is a form of product that consists of an activity, benefit or satisfaction presented for sale.

It is noticeable that some of the consistently cited characteristics of service in the literature, which tries to describe what makes a service distinguishes itself from a product are the intangibility of services, its heterogeneity, the simultaneity of production and consumption, and its perishability (Hoffman & Bateson, 1997; Rust & Chung, 2006).

For Lewis and Klein (1985), the concept of intangibility is the only characteristic that is common to all services. According to the author, intangibility is physical inexistence, the service is not palpable, it cannot be seen, felt, or smelled. In this regard, Parasuraman et al. (1985) clam that services are not endowed with aroma, flavour, or sense of touch, in other words, they cannot be quantitatively measured, tried and examined before being consumed.

Inseparability is a service characteristic that makes it impossible to disconnect the production of the service from its consumption, in order words, services are produced and consumed simultaneously (Grönroos, 2007). In addition, for most services, both the buyer and the provider need to be at the same place at the same time for the service to occur (Grönroos, 2007).

For Zeithaml (2006), perishability implies that the service capacity cannot be stored, warehoused, or kept on hand for times of higher demand, so it is developed in a specific place and time, usually whenever and wherever is more convenient for the customer.

Heterogeneity, also referred as variability, describes the uniqueness of service offerings. While products can be homogeneous and mass produced, the same is not true about services, since it

varies according to the perception of performance experienced by each customer (Rust & Chung, 2006).

One interesting point brought by Guerra (2010) is that despite the heterogeneity of services, it is the quality of the service that will essentially set two competing firms with similar products and services apart.

According to Grönroos (1994), the perceived quality of a service is a subjective analysis, and its greater or minor satisfaction results from the comparison of the performance of the service in relation to the person's expectations, and this will define the future of the relationship with the provider. Kotler (2000) includes that the results of perceived quality are good when the services received or experienced meet customer expectations. Likewise, Gianesi and Correa (1996) emphasize that the service provider must recognize and prioritize their efforts, aiming at a favourable perception of their offered services, as the first and last moments of the service purchasing process will influence the customer's decision to repeat or not the acquisition.

Up to this point it is noticeable the variety of definitions and characteristics that are used to try to define a service, however, it is necessary to understand how marketing deals with the task of presenting an intangible good to customers, without them being able to see or test it before consuming it in fact. In this regard, Churchill and Peter (2013) report that the marketing of services is similar to the marketing of tangible products, since, although goods and services have different meanings, both are intended to offer value to customers. However, all the specific characteristics of the services turns the marketing of service in a challenge for marketers, because it is difficult to make customers take notice of a product that they cannot see, so service marketers have to deal with this promotional issue (Hoffman & Bateson, 1997).

The physical inexistence often results in uncertainty for the part of consumers, since one is unable to observe the result of the service before purchase and consumption (Fahd Khan, 2009). Therefore, the function of the service marketing is to try to make the service offer as tangible as possible, highlighting the offered benefits (Kotler et al., 2016). We can then understand that the main concern of Service Marketing is, somehow, to materialize the service, in order to avoid or reduce the fear of customers in testing and using it. For Gummesson (2005), the tangible elements of a service are expressed in forms of the physical evidence, which are intended to seduce the customer by diminishing mistrust and transmitting the feeling of trust.

1.3. Marketing objectives

Setting objectives can be understood as a method, out of which, a company declares its intention and commitment to seek intended results (McDonald, 2008). Likewise, Churchill and Peter (2013) point out that objectives describe the results that are expected to be achieved as the outcome of performing the mission of the company.

Westwood (2013) comments that, in a correlation between objectives and strategies, the first refers to what the company intends to achieve and the second refers to the ways to achieve it.

The preliminary definition of objectives is important because it ensures the cohesion of the strategy with the mission, vision, and values of the company, in addition, it enables the agreement of the stakeholders with the course of the defined objectives (Lindon et al., 2004).

Carvalho (2016) stated the five key aspects for successfully objectives setting, according to the author the objectives must be specific and measurable, attainable, realistic and time bounded. Additionally, Gillespie (2016) explained in detail these five attributes, that can be designated as SMART. The first letter stands for Specific, because the objective needs to be elaborated precisely, and it should be clear, moreover, it also has to be Measurable, since it might be analysed in terms of values or volumes, in addition it must to be Attainable, because it has be possible to carry out, furthermore, it needs also to be Realistic, since its outcome has to be within the reach of what the resources allow, and finally, it needs to be Time-bound, because it should have a specific deadline for its completion.

1.4. Marketing situation diagnosis

For Ferrel and Hartline (2005) in a marketing situation analysis, the company's internal and external environment must be investigated and diagnosed. Likewise, Dibb et al. (2008) refers to the diagnosis of the situation as the activities related to the internal analysis of the company, the market, the external environment, and competition.

Further, Kotler and Keller (2016) comment that the situation analysis aims to obtain and analyse data, transforming them into information that will help define marketing strategies and decisions. Likewise, Kerin et al. (2008) add that these activities aim to understand where the company has been lately, where it is now and where it is headed, considering the organization's plans, external factors and the trends that affect it.

One step in-depth in the context of the situation analysis, McDonald and Wilson (2016) refer specifically to the analysis of the internal environment, with a view over the variables that the company has total control over.

In addition, Lindon et al. (2004) include that the internal analysis seeks to identify and define the resources that the company has at its disposal and the difficulties that limit it. In like manner, Lisboa et al. (2011) remark that in this type of analysis, it is necessary to identify the characteristics of the company's resources and capabilities, as well as its ability to use these resources in an integrated, efficient, and effective way.

Finally, with a broader approach, Lovelock and Patterson (2015) characterize internal analysis as a series of activities with the goal of identifying the company's resources, such as financial and human resources, and the organization's limitations or restrictions. The authors also add that these activities imply the determination of the company's competences, the definition of strengths and weaknesses that define the chances of taking advantage of existing opportunities in the market.

On the other hand, as defined by Caetano and Rasquilha (2010), in the external analysis, a study of factors that cannot be controlled by the company, but which influence its planning process, is carried

out. Lambin (2000) adds that this analysis seeks to identify which are the opportunities and threats that the organization faces and how the company can take advance of the opportunities and minimize the threats.

For Vellas (2016), the external diagnosis is based on the study of the main forces of the macroenvironment in which the company is inserted. According to Gupta (2013), this macro-environmental study consists of analysing the impact of political, economic, sociocultural, technological, environmental, and legal forces on company operations, which is known as PESTEL analysis.

Sammut-Bonnici and Galea (2015) comment that macro-environmental forces can both benefit and harm a company, adding that only a detailed analysis of this environment will determine the degree of threat/opportunity that each force brings to each organization and its microenvironment. From this analysis, relevant data for the SWOT analysis emerges.

According to Lee and Kotler (2015) as opposed to the macroenvironment, a microenvironment involves individuals or organizations that are interested in the company's activities and whose actions have an impact over it, this is the case of competition, consumers, the market, suppliers, and distributors.

For Wood (2010) the SWOT analysis (Strengths, Weaknesses, Opportunities, Threats) is a way to measure and control of both the internal and external environment.

In such manner Júnior et al. (2018) remark that the variables related to the company's strengths and weaknesses arise from the internal context, while the external diagnosis reveals the company's opportunities and threats.

Lastly, with a comprehensive concept, Pakkanen (2012) defines the objective of this analysis as the identification of the company's strengths, in order to strengthen them and take advantage of them, as well as recognizing the organization's weaknesses, to avoid or eliminate them. The author also includes that it is necessary to explore market opportunities, to take full advantage of them, and discover market threats, in order to minimize or avoid them completely.

1.5. Marketing strategy

As reported by Westwood (2013), marketing strategy means the allocation of resources dedicated to marketing in order to meet companies' overall goals. In addition, Slater and Olson (2001) define it as decisions and actions made with the intention to satisfy the expectations of customers. The writers interpret marketing strategy as the process of establishing the segments, targets and positioning, the company should follow to face and fulfil costumers' demands. Naim (2021) points out that top-down models like the STP became more appealing over the years as companies pivot to delivering content to their target audiences by digital channels and social media.

Likewise, Kotler and Keller (2016) claim that businesses should divide the market and adopt the fundamental scheme of strategic marketing, that initiates with segmentation, stage where the

company identifies the different needs of customers and the markets, followed by the definition of the target, when the company selects the target audience that it intends to affect, and finally the definition of the positioning, which reflects the perception that the company transmits to its targeted audience.

1.5.1. Segmentation

This is the step where marketers figure out the essential characteristics for each group within the market (Naim, 2021). Market segmentation is fundamental to the business' success, as it is extremely important for a company to know its audience so that it can adapt its offer in the most appropriate way (Lindon et al., 2004).

Lovelock and Patterson (2015) state that this activity is necessary because usually an organization is not able to satisfy the exigencies of all potential customers. Hence, the single focus of the company in particular segments of clients can provide more suitable offerings for the customers and improve the communication efficiency and business profitability (Paley, 2008).

In the segmentation process, groups of consumers that have the same preferences and homogeneous needs are identified and examined (Kotler & Armstrong, 2014). These groups, or segments, are usually defined based on the geography, demography, psychography and behavioural variables of customers (Kotler et al., 2005).

Geographic segmentation divides the market into subgroups such as regions, countries, and cities (Paley, 2008). Moreover, demographic segmentation separates the market according to aspects such as age, gender, family, occupation, education, religion, race, and nationality (Kotler & Keller, 2016).

In addition, psychographic segmentation arranges the market according to the lifestyle or personal characteristics of each individual (Dibb & Simkin, 1991). Finally, behavioural segmentation distributes buyers into groups based on their knowledge and attitudes such as loyalty, decision process and quantities consumed (Lancaster & Reynolds, 2002).

Upon the analysis of these segments that were defined, the company can choose which customers will be targeted, thus adjusting its marketing strategy accordingly, to get a better position in relation to competitors (Pesonem at al., 2011).

Within the same context, McCarthy and Perreault (1997) support the idea that by specializing itself into the needs of a particular segment, a company develops a more satisfactory marketing mix, which consequently will be more profitable for the company.

1.5.2. Targeting

The next step in developing a consistent marketing strategy is to take targeting decisions, which can be understood as the selection of the group that will be more receptive to the offer (Naim, 2021). Targeting arise from the preceding segmentation, because once the customers are grouped, it is

necessary for the company to decide which specific segments it should satisfy (Lancaster & Reynolds, 2002). Likewise, for Kotler and Keller (2016), it is at this stage that the organization studies the various segments and decides which will be the targeted segments. In agreement, Ogden (2007) includes that it will be to this group of people that the company should direct its marketing efforts.

1.5.3. Positioning

The last element of the strategic decisions, after the segmentation and targeting, is the definition of the strategic positioning (Dibb & Simkin, 2000).

The development of a strategic positioning involves the definition of marketing programs that meet the needs of customers in selected segments (Nogueira & Sette, 2013).

Dibb and Simkin (2000) also claim that it is important for companies to define the position they intend to occupy in these segments, so that they can adjust their marketing mix and take better advantage of the market.

Another way to define positioning can be as the efforts one company makes with the intention to occupy a clear, distinct, and desirable place in relation to competing business in the minds of target customers (Dalcol & Siluk, 2012). In like manner, Ferreira et al. (2012) comment on positioning as the identification that we want to give a brand and its products in the market against the competition, and the author adds that this can be called the principle of differentiation.

Lastly, we can understand that positioning leads to better differentiation from competitors operating in the same segments, moreover, it is operationalized through the marketing mix which builds the desired perception in the mind of the customer (Ferreira et al., 2012).

1.6. Marketing-mix

In the decade of 1960, the previous existing idea of marketing mix was divided into four main categories, which are the now widely known concept of the marketing 4P's, referring to product, price, place, and promotion (McCarthy, 1964). This concept plays an essential role in formulating and implementing marketing strategies, as these four variables are manipulated to operationalize strategies and advance toward meeting consumer needs, and at the same time, toward company goals (Chaffey & Smith, 2017).

Accordingly, Kotler and Keller (2016) refer to the Marketing Mix as a tool used by the company to reach its marketing objectives. This tool is composed of a set of controllable variables that allow the company to take its idealized strategies and put it concretely into the market (Nunes & Cavique, 2008).

For Wichmann et al. (2022) the marketing mix, its instruments, and its function in the value-creation process have evolved considerably over the past decades, and especially in the recent years through technological advances such as Internet of Things (IoT), smart portable devices, and an increased

effectiveness in the collection, analysis and application of data, have empowered companies to progressively customize each of the marketing mix instruments to ever smaller segments.

With regards to its instruments, as reported by Prahalad and Ramaswamy (2000), the first of the 4P's is the Product, which can be defined as everything that potentially has value or can give benefits to the targeted market, this concept includes tangible goods, as well as services, causes and ideas.

The second "P" stands for Price, which can be understood as the amount of money a buyer must pay to obtain the right to use or own the product or service (Hawkins & Frohoff, 2010). Complementing this definition, Colbert et al. (2003) say that price is not only the financial value associated to a product, but the effort made by the customer when buying it.

Then there is the Place, meaning the location where the product can be bought, or even, according to Hawkins and Frohoff (2010), the channels used to get the products to the targeted customers.

Ultimately, the Promotion refers to the communication prepared by the marketing teams to make customers aware of the offering, under communication we have comprehended: advertising, public relations, personal selling, and sales promotion (Colbert et al., 2003).

However, as remarked by Wirtz and Lovelock (2018), it was noticed that the traditional view of the marketing mix covered no longer the new scenario and evolution of the needs faced in modern times, especially due to the development and growth of the services sector. Thus, it was necessary to extend the mix, and three new "Ps" associated with the service context, were added, which then refer to the variables of People, Process and Physical evidence (Pereira et al., 2015).

The Process variable refers to the set of actions or procedures that are carried out for the creation and delivery of the final product (Enache, 2011). Likewise, regarding service processes, it can be understood as the activities encompassed between the first customer contact, up to the outcome delivered (Lovelock & Wirtz, 2016).

The next variable regards the people, for Grönholm (2012) it comprises the interactions between customers and employees that can influence consumer satisfaction. This variable is inherent to services, as people are usually one of the few elements of the service that the customer can see, thus representing the company's image (Grönholm, 2012).

Finally, the concept of physical evidence consists of all the physical characteristics that could draw the attention of a potential consumer to the service, such as: the decoration of the establishment, the appearance and clothing of the employees and the conditions of the facilities (Kotler et al., 2005). Thus, Rowley (2016) emphasizes that physical evidence is highly valuable for services, because it is usually the only tangible clue that the customer has about the service experience.

1.7. Marketing plan

Marketing is one of the most valuable types of business activity that must be planned in a business, as the marketing plan defines the nature of the business and what that organization will do to satisfy its customers' needs in the marketplace (Stevens et al. 2021). The authors still add that marketing

plan is not just a scholar concept of use to academics but is an immensely practical exercise that can mean the difference between success and failure to all types of organizations, and in order of it to be successful, it must be founded in a conceptual framework that provide basis for analysis, execution, and evaluation (Stevens et al., 2021).

According to Kotler and Armstrong (2014), an organization must guide its activities by its mission, vision, and values, and from these elements draw its strategy and strategic objectives, afterwards it becomes necessary to plan and allocate sufficient resources to achieve these objectives.

A marketing plan is an essential instrument whose main objective is to focus on the planning and tactical coordination of an organization's marketing activities, to achieve the proposed objectives (McDonald & Wilson, 2016). Nunes and Cavique (2008) understand that the ultimate objective of the plan is to create and take advantage of market opportunities. Along the same lines, Wood (2010) defines marketing planning as a structured process, in which one seeks to increase value for consumers, the company and stakeholders.

Kotler and Keller (2012) understand that there is a division of the marketing plan both at the strategic and at the tactical level, therefore, while the strategic plan focuses on analysing the best opportunities in the market, the tactical plan focuses on specifying these strategies in the form of operational actions and marketing-mix characteristics. Additionally, Dias (2003) says that this plan is an essential element for the organization's global business plan and provides managers with detailed and specific actions.

Regarding the structure of the plan, for Wood (2010) it should start with the analysis of the situation, followed by the definition of objectives, strategies, and marketing actions, concluding with the implementation, evaluation and continuous control of the defined activities, in order to achieve the goals. However, it is notable that there are several structures and models that can be followed in the definition and elaboration of a marketing plan (Lançós, 2015). Thus, based on the theories of Kotler and Keller (2016), Westwood (2013) and Wood (2010), this marketing plan will consist of five distinct stages.

Initially, a diagnosis of the situation is executed, which according to Kotler and Keller (2016), is an analysis of the external and internal factors that influence the activity of a company, the external is divided into the macroenvironment (economic, demographic, cultural, political, legal, environmental, and technological factors) and the microenvironment (competition, sector, community, suppliers, distributors, and customers). The authors also comment that the internal analysis encompasses financial, human and production resources, marketing, and supply.

Then, the definition of the central marketing strategy is carried out. Wood (2010) describes this stage as the moment when the marketer must segment the market into consumer groups, then choosing the one on which it intends to focus, and at the same time, the positioning is chosen, meaning the way the business wants to be distinguished in that segment.

The next point is the definition of objectives, that is what the organization wants to achieve qualitatively and/or quantitatively.

In the final stage, which Westwood (2013) refers as the operational marketing plan, there is the elaboration of the marketing-mix, followed by the budget definition and actions scheduling. In this last component, an action plan that allows the Marketing Plan to be put into practice is proposed, this plan must be composed of the: activities to be developed and the respective deadlines, costs and responsible for action (Westwood, 2007).

2. Research Methodology

2.1. Objective of the study

The primary purpose of this study is to investigate and define the appropriate marketing strategy and elaborate a marketing plan for a recently created Brazilian online business called Probate for Dummies.

Thus, aiming at the operationalization of this objective, the study is divided into three processes:

- Investigate and determine the central strategy for the marketing plan, by assessing its three components: segmentation, targeting and positioning.
- Characterize the seven components of the services marketing-mix (7 Ps): Product(service), price, promotion, distribution, place, processes, and physical evidence.
- Design a practical operational plan composed by specific marketing actions addressed to each goal stablished, along with the required budget and the schedule of implementation.

2.2. Nature of the research

It can be stated that this research follows an inductive approach, as it uses collected data in order to explore the general phenomena regarding the business, environment and stakeholders, thus enabling the identification of patterns, build themes and create a conceptual framework. According to Bryman and Bell (2015), inductive research approach aims to support the development of new theories, knowledge, and judgments. Likewise, Saunders et al. (2012) manifest that in the inductive research approach the researcher collects data and then theory can be developed based on data analysis. A third description for inductive research is given by Bernard (2011) who says it involves the search for pattern from observation and the development of explanations and theories for those patterns through series of assumptions.

In alignment with the research approach, this study carried out qualitative research, therefore, it tries to provide deep insights into the situation examined, as defined by Wyse (2011) qualitative research is used to explore current trends in thoughts and opinions within the field and dive deeper into the problem in focus. Creswell (2009) talks about a qualitative research design which enables the researcher to make inquiries and relevantly capture people's perceptions regarding the subject. These perspectives in combination with the idea of Yin (2014), who says, researchers use the qualitative method to explore a phenomenon and to understand the perspectives of the participants, validate the choice of this methodology for this study.

It is also necessary to mention that this study is used to gain valuable insights and understanding of fundamental reasons within this topic, by exploring opinions and essential motivators acting on the business and environment in focus. According to Saunders et al. (2012), an exploratory research method should be conducted to study an issue that has not been clearly defined yet, by simply exploring the research subject and providing a more comprehensive understanding of the topic. Therefore, this research does not provide a final and conclusive evidence about the topic, nevertheless, it intends to intensely investigate the topic by collecting and analysing relevant data in order to fulfil the research objective, as Nargundkar (2008) stated, an exploratory study may not have as rigorous as methodology as it is used in conclusive studies, and sample sizes may be smaller. But it helps to do the exploratory study as methodically as possible, since it might be used for further decisions, and as foundation for the way a researcher is going to conduct subsequent studies (Nargundkar, 2008).

2.3. Description of data collection

The data that provided the basis to this study is divided into two categories, the primary data that was collected by the application of semi-structured interviews, and secondary data was collected from the review of public documents, the company's website, social media websites, and bibliographical research.

Primary data refers to raw primarily collected new data that did not exist or had not been previously published, that is collected to suit specific research purposes and tend to be critically analysed in order to find answers to the research question (Bryman & Bell, 2015). On the other hand, secondary data is data that has been previously published. According to Healy and Perry (2000), secondary data is significant in the research as it helps to understand the research gaps as well as validate the findings. Additionally, for Bryman and Bell (2015) no research can be validate by only using primary data, regardless of its originality.

In this study, the interview data was collected by the application of four semi-structured interviews with discussion topics, so the respondent could have the autonomy to dialog and provide a discourse as complete as judged necessary to cover the subject. This method was chosen to enable extent, in-depth understanding and detailed information gathering (Merriam & Tisdell, 2016).

For Jamshed (2014) these interviews should be guided by a schematic presentation of questions or topics explored by the researcher. Thus, the interview guides (Apprendix A and B) were formulated in accordance with the topics necessary for the elaboration of the marketing plan, and are divided in the following four dimensions:

- Organizational Diagnoses;
- Central Marketing Strategy;
- Marketing-Mix;
- Future expectations.

In the sequence, as Boyce and Neale (2006) point out, these questions are to be applied to the selected respondents, to explore their perspectives on a particular idea, program, or situation. Furthermore, Chapleo and O'Sullivan (2017) stated that qualitative studies often collect data through conducting interviews for in-depth understanding of the research problem. In addition, when compared to questionnaires, interviews are more potent in eliciting data and allow researchers to explore people's views in greater depth (Alshenqeeti, 2014).

To assist ensuring accuracy and validity, the interviews were recorded, as advised by Paiva et al. (2014), recorded data is beneficial to the researcher, for data analysis and to support the reliability of the study. In concordance, Sutton and Austin (2015) say that using a recording device will remind the researcher of critical situational factors discussed during the interview and prevent data loss during the analysis stage.

2.4. Description of data analysis

The data treatment of the audio recordings started by the transcriptions of the contends, followed by the fragmentation of phrases and sentences, that allowed for further categorization, necessary for the development of this marketing plan.

To perform the categorization, the researcher distributed the fragmented transcriptions in consonance with the four dimensions (organizational diagnoses, central marketing strategy, marketing-mix and future expectations) of the questions. According to Eriksson and Kovalainen (2008), to develop understanding of a general topic, data can be coded by appropriate levels, names, or codes to classify the data according to themes and topics. Therefore, to perform the distribution, the first criterion followed was to address each fragment correspondingly to the theme of the question it was answered. Secondly, since the questions were open, in the cases where the fragments of answer deviated from the theme initially discussed, the distribution occurred to where it was better suitable, and in a manner that the researcher judged helpful to understand the overall subject.

Subsequently, a descriptive-qualitative analysis of the contents in each theme was carried out, with the display of the main fragments of answers that support the inferences raised by the researcher, according to Bardin (2011), this technic of analysis is characterized by the intention to obtain, through systematic procedures, a concise description of the content of the messages, indicators, quantitative or not, that allow the assumption of knowledge related to the conditions of production/reception of these messages.

In addition, secondary data have been treated by documental analysis, which can be described as the set of efforts aimed at representing the content of a document in a form other than the original, to facilitate, at a later stage, its consultation and referencing (Bardin, 2011).

Lastly, the combination of the information and insights provided by the three experts, along with the secondary data analysed, the theoretical framework here reviewed, and the interview of the owner himself, which aims to obtain information that would allow a coherent internal analysis, is the foundation for the completion of this study's objectives.

2.5. Sample characterization

According to Strauss and Corbin (1990), sampling should contemplate people, places and situations that could likely provide favourable circumstances to obtain the most pertinent data about the investigated subject. Patton (2014) agrees by declaring that in order to disclose or fully comprehend the researched phenomenon, samples must be chosen in consonance with the area that provides most expertise within the phenomenon. So, for this study, the sample is composed by a total of four elements, being the first of them the owner of the company, and the three others are experts from different fields that impact or have a strong connection with the business.

Therefore, a Lawyer, a Psychologist and a Real Estate Agent were selected, considering that the knowledge and experience of these professionals will assist, from different perspectives, the comprehension of the business, and provide insights from each of their specialization areas, regarding the surrounding environment of the company. Malhotra and Birks (2007) consider that this type of sampling, selected by the convenience of the researcher, proves to be suitable for several situations, including market tests to determine the potential of a new product.

According to Brown (2006), the lower statistically significant of this sample is sufficient, since this is an exploratory research by nature. In accordance with Honigmann (1982), nonprobability sampling, such as this, is coherent whereas the fieldworker does not expect to essentially use collected data to answer questions like "how much" and "how often" but rather to solve qualitative problems, such as discovering what occurs, the implications of what occurs and the relationships linking occurrences.

Therefore, the sampling for this study can also be classified as non-probabilistic, based on the fact that it was possible to choose which elements to include in the sample arbitrarily and based on the investigator's personal judgment (Malhotra & Birks, 2007).

3. Presentation and Analysis of Results

The results of this study are divided into two sections, the first refers to the analysis of the four interviews carried out, followed by the second section where the marketing plan and the elaboration of the brand's marketing strategy are presented.

3.1. Analysis of the interviews

In pursuance of the generation of the primary data to support the forthcoming definitions of marketing objectives and marketing strategy for the business, in this section, the results of the examination of the four interviews will be presented. These results assisted in the comprehension of the marketing plan for the company in question, and consequently, provided the foundation for the fulfillment of the objectives of this study.

The first respondent is designated here as Mr. Bruni, the owner of the company, who is 59 year old, male, holds a bachelor's degree in accounting, and is resident in Birigui, São Paulo, Brazil. He was

present, along with the researcher, in all interviews with the specialists, which, due to logistical reason, were carried out by video conference, and recorded with the Microsoft Teams software.

The psychologist chosen, is a 37 year old female, which holds a bachelor's degree in psychology, specialized in grief and loss healing processes, performing this activity for the last eight years, in the Araçatuba, São Paulo area. She is identified as Mrs. Barbosa.

The third element of this sample of specialists is a 30 year old male lawyer, resident of the city of São Paulo, Brazil, with a literary background in Law, and a postgraduate degree in tax and inheritance law, being designated here as Mr. Alexander.

The last component of this study is a 38 year old real estate agent, working in resale of real estate around Birigui area for twelve years, identified as Mr. Magno.

All elements of this sample have Brazilian nationality, none of them know each other, and none of the three professionals were aware about the brand before the first contact made by the researcher.

Finally, the thematic used in the division of the question of the interviews, as seen in appendices A and B, was re-employed for the analysis of the contents. In this way, to respond to the objectives of the investigation, the analysis was divided into four categories:

- Organizational Diagnosis;
- Central Marketing Strategy;
- Marketing-Mix;
- Future Expectations.

3.1.1. Organizational diagnosis

Firstly, the responses of the various interviewees were compared in relation to their opinions over the company's surrounding environment and the market context that it intends to explore.

Figure 1. Analysis of the interviews: Organizational Diagnoses Insights.

Source: Author's own elaboration.

Through the analysis of the interviews, it was possible to characterize the company's macro-environment based on the perspectives of the chosen professionals. First of all, it was pointed out the existence of legal external factors that can directly affect the business, namely the Code of Ethics and Discipline of the Brazilian Bar Association, which, according to the lawyer interviewed, is outdated, and needs to be revised as it no longer follows the actual evolution of digital media.

"If this code of ethics legislation was revised and updated, all lawyers would dive into online channels to facilitate first contact with clients". (Mr. Alexander, Lawyer)

In the same sense, the owner commented on the rules of personal data Protection, mentioning it is a legal requirement, mandatory to use information and advertise to the online users. He complemented yet about the importance of paying attention to the copyrights when creating online content.

"An online content creator eventually discovers that it is necessary to include the website's privacy policy and inform the user about the fact that their personal data may be used for commercial purposes. It was a natural process that I figure out while starting the companies blog, the same occurred with the copyrights policies". (Mr. Bruni, Owner)

During the interviews, it was also highlighted the long time for carrying out a legal process in Brazil, which according to the lawyer is one of the slowest and most bureaucratic in the world, however, this fact is seen as an opportunity by the company owner, which intends to turn this longer process into one of the specific features that will be addressed in the development of the trading platform.

"Unfortunately, the Brazilian judiciary system is internationally recognized for the delay in its processes, and it can take years to carry out a probate process, especially in cases where the heirs do not agree on how to share the inherited assets". (Mr. Alexander, Lawyer)

In addition, opportunities related to the geographic dimensions of Brazil were also observed. Highlighting its large population and its territorial extension. As well as the way in which technology, more specifically the internet, manages to facilitate the permeation of the brand throughout the territory was underlined.

"This country has such a large population that people probably pass away all the time and every day, so every day there must be new people who have no idea about what to do in this situation". (Mr. Bruni, Owner)

"That is one of the things I envy about working on the internet, Brazil is too big, and even so, it is possible to reach all of them in any corner at any time". (Mr. Magno, Real Estate Agent)

With regards to social factors, it was pointed out the ageing population factor, along with the social blockade that exists in relation to the subject of death, intrinsic to the contents addressed by the brand.

"I immediately identify two factors with a strong link with the subject, the aging population, and the blockage that exists with the acceptance of death, and resistance to grief that most western cultures and religions have". (Mrs. Barbosa, Psychologist)

From a perspective of the company's microenvironment, based on the owner's words, it was possible to capture a preview of what had later in the study become the definition of the brand's target customer, which was further better detailed in the marketing plan.

"*The client is only Brazilian people, because of the language we write, and the Brazilian legislation that is being considered"* (Mr. Bruni, Owner)

"…but it can be anyone, and living anywhere with internet access, and on top of that, the person doesn't even need to speak the difficult language of the lawyers... I write the site to help anyone who reads it, but what interests us more are those people who own real estate, or any valuable assets, and want to get rid of it".

Similarly, from the owner's answers, the two suppliers of the company, at its current stage of development, were identified.

"For now, it's very simple, I just need two companies, one to keep the name of the site online, and the other to edit the contents and tweak other technical features of the site". (Mr. Bruni, Owner)

Regarding the competition, respondents pointed out not perceiving any direct competitor for the business in the chosen niche. However, it was later indicated by the real estate agent that, even indirectly, there is competition with the largest second-hand goods trading website in Brazil, topic that was later complemented by the lawyer.

"This is the interesting part, because the way I've always seen the business, I don't have any direct competitors". (Mr. Bruni, Owner)

"…even if the current websites are not aimed at the same targeted niche, I believe that currently customers go to competitors because they have no alternative". (Mr. Magno, Real Estate Agent)

"There are websites of some law firms, but they cover both the topic of inventory and any of the other topics of legislation, there is no website so focused in this manner". (Mr. Alexander, Lawyer)

Considering the answers obtained and discussions performed by the respondents, it was possible to preliminarily assess the internal and external components of the company's environment, which, despite being already present in the owner's mind, later became clear to all participants the importance of the synergy of the other members of the group in complementing each of the

perspectives approached, thus enriching the perspectives of one another concerning organizational diagnoses of the business.

3.1.2. Central Marketing Strategy

The second stage of the analysis organized the respondents' opinions according to the topics that concern the structuring of the marketing strategy for the company. Here the answers provided were arranged according to strategic related topics such as: objectives, market segmentation, targeted customer, points of differentiation and consumer behaviors.
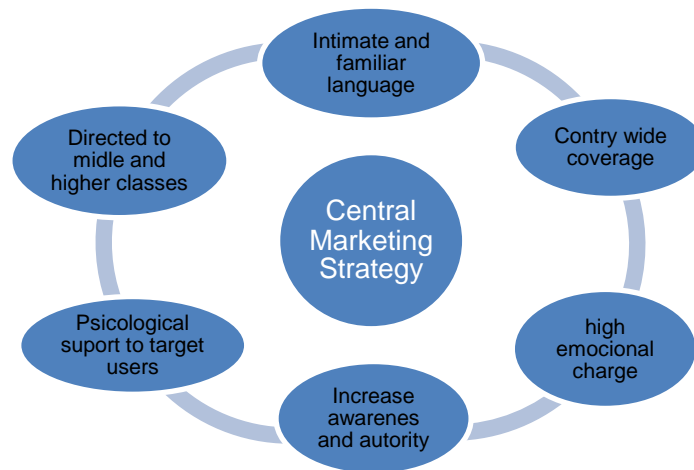

Figure 2. Analysis of the interviews: Central Marketing Strategy Insights.

Source: Author's own elaboration.

Concerning the segmentation, through the analysis of the interviews, it was possible to identify that the Probate for dummies operates in the heritage assets trading sector, with a geographic coverage extending to all Brazilian units of federation and cities.

With regards to the purchasing power of the target audience, the company develops its services aimed at the upper middle-class segment of the population, because, when compared to the competition, its prices are higher, justified by the fact of representing a specialized service for a highly segmented customer, and with such particular support required in the context of receiving an inheritance.

"…clients who come to me to advertise properties that they received in their inventory already have an economic power above the average." (Mr. Magno, Real Estate Agent)

"We aim at people who seek quality service and good treatment, who are not looking for the cheapest price… we are talking about people that often receive more than one property by inheritance and are looking to sell them". (Mr. Bruni, Owner)

"…in cases of clients who have only one residence for the whole family, this property ends up not going to the market of resale". (Mr. Magno, Real Estate Agent)

Following the inquiry, it was also possible to outline the behavioral/psychological characteristics of the company's target audience.

"…these are people who have lost a family member and are willing to sell the inherited assets and use internet to search for answers about how to deal with the situation either in the emotional matter or in the administrative means". (Mr. Bruni, Owner)

On the other hand, there is no segmentation related to gender of audience, however it can be outlined that the company's market targeting consists of people from twenty-five to fifty-five years old, due to the usage of internet, and mainly living in the bigger Brazilian cities.

"From our experience, many small towns still do not have proper internet access, or the population is still unfamiliar about dealing with this type of subjects and situations via internet". (Mr. Bruni, Owner)

"…indeed, in smaller villages and towns, the population often has to travel to the nearest neighboring city, in order to get in touch with a lawyer, or access the services of a notary office". (Mr. Alexander, Lawyer)

It was also possible to identify the comment about the hidden value in the properties for customers, concept present in the mission of the company, and which according to the respondents, end up transacting the properties between acquaintances and their own family, often below market price.

"…cases of inherited properties that appear on the market are rare, from the cases that I follow, these properties end up being commonly traded by the family members themselves, or close friends, and therefore, often at a price below the market.". (Mr. Alexander, Lawyer)

With regards to the company's positioning, it can be perceived as a company that, through the online solution that generates more value from the good received by the inheritance, when compared to assets transacted locally, while is concerned with the emotional and psychological well-being of the user.

"It is clear that there is no website with a user-friendly design to follow the emotional load of the user, even in the writing of its contents, there is no appeal to the emotional side". (Mrs. Barbosa, Psychologist)

"...we want to be seen as a company that cares about emotional aspects of our customers, and that the same time, is able to unlock the maximum financial value out from their inherited assets." (Mr. Bruni, Owner)

It is understood that the recognition of the user's emotional charge is a point of differentiation for the company. This aspect shall be present in its services and contents, so that the brand stands out from its competitors. In practice, a familiar and positive language must be used, along with the focus on the well-being of people that is has being through the loss of a family member.

"Few people know that it is possible to request a permit from the judge, allowing to sale the property, even during the inventory process, often this practice is carried out by the court so the expenses with the probate procedure itself are paid with the earnings of the inherited assets". (Mr. Alexander, Lawyer)

"We seek to position our product in a market where it was little known about, and the other differential is the longer period of advertising, feature that better fit into the extended time that the probate process takes." (Mr. Bruni, Owner)

"There are two ways to carry out a probate process, through the justice, that usually takes one to three years, or at the notary office, with a waiting time of, at least, six months). (Mr. Alexander, Lawyer)

Lastly, the company should consider include features such as the longer time that the heritage process takes in Brazil, also the likelihood of one inherited asset to be sold during the probate process, thus adapting its pricing practices and time availability for listing the goods on the trading platform.

3.1.3. Marketing Mix

In this section, excerpts from the interviews with direct impact on features and characteristics reflected in the company's service were analysed, aligned with the company's strategy, and targeting the selected audience.

Figure 3. Analysis of the interviews: Marketing Mix Insights.

Source: Author's own elaboration.

It was understood that the product in question can be characterized as an online platform for buying and selling heritage goods where sellers and buyers interact, this interaction from the seller to the buyer relies on the actions of the people directly involved in the transaction, with no mediation from the company.

In addition, for the respondents, it is extremely important the integrate psychological assistance to the customer, which, besides being a distinguishing feature from the competition, ends up adding value to the customer while serving as physical evidence of the service as well.

It was also found that the advertised goods should be divided into various product categories, such as vehicles, real estate, artwork, appliances, and furniture, instead of the initial intention the owner had about only having a real estate website.

"It was, to me, always extremely important to develop a free online ads model for the user, and after that, search for other ways to monetize the service". (Mr. Bruni, Owner)

"I think the most profitable service will undoubtedly be the advertisement on the online platform … but the site's initial source of income was the display of third part banners". (Mr. Bruni, Owner)

"As long as the inheritor claims his right to an asset… any asset, with financial value or not, will be present in the inventory list, such as jewelry, artwork and automobiles…". (Mr. Alexander, Lawyer)

Regarding the price, it was possible to verify that people can post, for free, classified advertisements on the website. The purpose of free ads is to be an online market where everyone can be a seller and/or a buyer and highlight the fact of the simplicity of the online advertising process, which takes place with the minimum about of inputs from the user. Nevertheless, in case the customer prefers one of the complementary services, then there might be associated costs.

"Majority of the users will not be paying for the listings…Though the customer who wants his listing to be featured on the top of the research, will have to pay". (Mr. Bruni, Owner)

"…the customer is attracted to the free ad, and it will always be available, from there we have time to persuade them to pay for a premium service". (Mr. Bruni, Owner)

The company's promotion is based on the use of digital channels, through content writing of the blog, social media marketing and online advertising. In the future direct marketing tools and public relations with press releases will be employed. The focus of the marketing message is to create awareness about the possibility of buying and selling heritage assets online, since there was not a stablished business of this kind in Brazil before.

"We need to create awareness about the brand, since it is new, and since there was not a stablished business of this kind yet". (Mr. Bruni, Owner)

"We currently use the blog and paid advertisements from search engines to attract visitors to our website". (Mr. Bruni, Owner)

Finally, from the reasoning of the answers from the owner, it was possible to conclude that there are three types of messages to be addressed to the Potential Customer, the Current Customer, and Sellers who have already published an ad. Thus, each one of those have a different message directed, going from informative content to administrative support and services suggestions, passing though the effortless of posting an online advertisement of a heritage asset, and the advantages of hiring a premium service to get more visitors and potential buyers in the ad.

"… there are those who searches on internet with doubts about the probate process, yet someone who had already found the company, and lastly the sellers, who already agreed and posted one ad". (Mr. Bruni, Owner)

3.1.4. Future Expectations

At this point, the research aims to evaluate the owner's ambitions, so questions about the future were carried out, thus outlining the medium and long term strategies of the company.
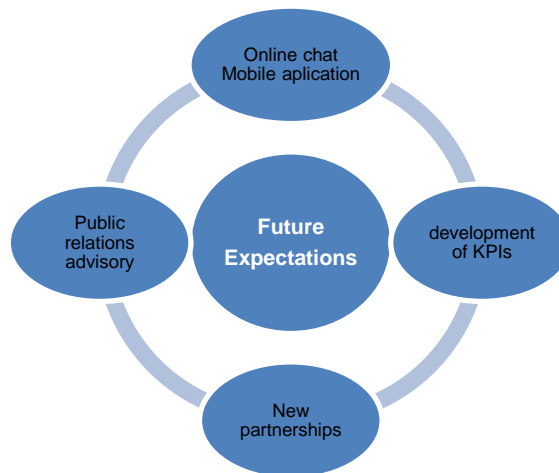
Figure 4. Analysis of the interviews: Future Expectations Insights.

Source: Author's own elaboration.

In this matter, it was concluded that the owner thinks of expanding the communication services with its users, through an online chat in addition to the development of a mobile application, as well as expand the public relations advisory to spread the brand beyond digital channels. The new partnerships are addressed to increment the convenience of users, along with the implementation of KPI's to measure the evolution of the brand, is expected.

"…the view of future is to grow… the growth in numbers of new visitors. We want to develop an online chat and a mobile application, and continue creating our image of brand of reference, to those numbers we must be a website people will visit regularly". (Mr. Bruni, Owner)

"… with help of public relations advisory, we expect to both increase the number of visits as well as build up our brand authority within users and population in general". (Mr. Bruni, Owner)

"We need to implement KPIs to monitor the evolution of all actions and the further contact with customers". (Mr. Bruni, Owner)

4. Marketing plan presentation

According to the literature review previously carried out, there are several theories from different authors proposing the set of steps that the Marketing Plan should be constituted. However, it is understood that each business manager is capable to adapt its structure to the company being analysed. Hence, based on the evaluation of the interview's contents, the following steps were carried out in the marketing plan for the company Probate for Dummies: first, an investigation of the surrounding situation of the company, with an analysis of its internal and external environment. Thereafter, the marketing objectives were defined, and the marketing strategies outlined in the form of segmentation, targeting, brand positioning. Then, a mix of marketing was framed, matching the previously defined strategy, and finally an operational action plan, regarding the marketing objectives, was developed, with which action describing the necessary tasks to fulfill the proposed objective, along with its schedule and budget.

4.1. Situation diagnosis

In the situational diagnosis of the company, three types of environmental evaluations were carried out, the macro environments, concerning factors that the company has no control, but have influence over the company. Followed by the microenvironment, which presents factors external to the company, although over which it has a level of influence, and finally an analysis of the internal environment of the company, exposing its history, organizational and facilities structure, mission, vision and values.

4.1.1. Macroenvironment (PESTEL)

Regarding the Political and Legal factors that directly affect the business, one specific legislation in the Code of Ethics and Discipline of the Brazilian Bar Association[1] (2015) prohibits lawyers from performing any kind of advertising or self-promotion, as well as any type of client gathering by advertisements in mass media, according to the institution, the objective of this law is to mitigate litigation between professionals, and discourage the commercialization of the legal activity in Brazil. However, if any change occurred in this particular law, influenced by the evolution of the digital medias, a new source of income for the website could be developed.

Still regarding the legislation, more specifically related to personal data of the customers on internet, there is the General Data Protection Regulation (2018), which establishes the regulation on the processing of personal data, both of customers and users in general, by companies. With the endorsement of this Regulation, users have easy access to their personal database information, in addition to being able to verify their data, users can request adjustments or even removal of information, whenever they consider it necessary (General Data Protection Regulation, Law nº 13.709, 2018).

Concerning the digital content creation, it is necessary to comply with the legal rules regarding copyright, which can be understood as the rights of an author over the content he creates and publishes. The violation of the copyrights means there was a misuse of an original creation in which a person or group of people holds the exclusive right to that creation, therefore any entity that intends to use copyrighted content must ask for authorization and give credit to whoever owns that content and commit to not infringing the copyright (Copyright Law Nº 9.610 of the National Congress of Brazil[2], 1998).

Lastly, according to the National Council of Justice[3] (2020), a judiciary process in Brazilian has an average duration of two years and five months, and when adding to this period the average time of the litigation in the first instance of one year, and in the judicial execution of the sentence in the second instance of ten months, a period up to four years and three months can be reached, for cases in which the family members do not have an agreement on the division of inheritance assets. The longer period of processing a juridical action in Brazil directly influences the business operation.

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[1] Código de Ética e Disciplina da Ordem dos Advogados do Brasil
[2] Congresso Nacional do Brasil
[3] Conselho Nacional de Justiça

Regarding the economic factors, Brazil currently occupies the twelfth position among the largest economies in the world and first in Latin America, and according to data from AICEP (2021) the country has suffered severe financial impacts caused by the Covid-19 pandemic, with the GDP registering a contraction of 4.1% in 2020, however mainly pushed by political measures to support economic activity, it was followed by economic growth, having already returned to pre-pandemic levels with a growth of 4.6% of GDP in 2021. Although without the political aid, the current projection is that the Brazilian GDP does not end the year 2022 with a growth value of more than 0.3% (IBGE, 2022). Consequently, most economic indicators show worse results than in years prior the pandemic, such as the unemployment rate, which has remained high since the beginning of the Covid-19 crisis, closing the fourth quarter of 2021 with twelve million unemployed people, equivalent to a rate of 11.1% of the Brazilian working-age population (IBGE, 2022).

Despite the economic indicators having been negatively affected, the digital commerce numbers presented good performance during the Covid-19 pandemic, the fact that people remained confined at home has generated a change in the consumption pattern, as shown by indicators developed by the Metrics Committee of the Brazilian Chamber of Digital Economy[4] (2022), which presents the Brazilian e-commerce with a growth of 48.41% in 2021, and revenues of R$161 Billion, according to the institution, this strong growth in online sales in 2021 reveals a new consumption habit, with the migration of purchases to the internet.

At the sociocultural level, data from the IBGE (2022) shows that Brazil had a 214 million people population in 2021, and yet there were over 30 million people over the age of 60 years old, this elderly population favors the activity of the company. Additionally, it is expected that the number of people aged 65 and over will practically triple, reaching 58.2 million by 2060, equivalent to 25.5% of the population (IBGE, 2022). Meanwhile, the advancement of the new digital generation, which uses more digital platforms, also favors the business. Lastly, the social taboo of the death event is something to be considered in the communication strategy.

From the technological standpoint, Brazil had 161,8 million people with access to internet in 2021, which indicates that 81% of the population over the age of 10 years old have internet at home (Agência Brasil, 2021). Concerning the distribution of this access, 77% happens from urban areas, and 55% comes from rural area with some level of internet access (Statista, 2021). Regarding the frequency of use, 90% of internet users reported accessing it every day, 7% at least once a week and 2% at least once a month (IBGE, 2021).

However, as the Avast Threats Report (2021) points out, Brazil is among the five countries with the highest number of cyberattacks on e-commerce in the world, as statistics on the country reveal that on average 1,046 organizations were attacked between the years 2020 and 2021, an increase of 77 % comparing both years, and yet in the same period, there was an increase of 8% in ransomware attacks (malicious applications that hijack victims' digital data) over the previous year.

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[4] Comitê de Métricas da Câmara Brasileira de Comércio Eletrônico

According to Avast (2021) these attacks are intended to credential theft, espionage, and abduction of vital information. For 2022, the trend is that ransomware will continue to be the biggest cyber threat in Brazil and in the world (Apura Cyber Intelligence, 2021). Thus, protection software of the digital platforms of the company must be kept up to date.

In conclusion, this PESTEL analysis shows that the legal scenario and bureaucracy of the probate subject are a significant opportunity for the company. Moreover, the increasingly number of people using internet are very favourable to the development of the business, however followed by its intrinsic threat, related to the security of the website.

4.1.2. Microenvironment

4.1.2.1. Consumer

The characterization of the costumers of the company is of a Brazilian citizen, men and women, mainly urban resident, that recently lost a family member who left assets (heritage) that need to be transferred, through a legal/administrative process called Probate, moreover, are willing to sell those assets, and use the internet to ask questions about how to do manage the situation.

4.1.2.2. Suppliers

In terms of suppliers, the website needs a hosting company, the online domain, and the platform for editing and updating the website, in this case, for the Probate for Dummies website, the hosting company is called Hostgator, which also provides the domain service, this company hosts over 10 million domains in the world and is one of the most popular web hosts in the industry (Cybernews, 2022). Furthermore, the website builder is the WordPress. The WordPress is the most popular content management system in the world and powers 34% of all websites on the internet (Kinsta, 2021).

4.1.2.3. Competitors

As for the competitors of the Probate for Dummies, it is necessary to consider that the brand is positioned among the actual online marketplaces of real estate and second-hand assets trading, which have in Brazil three main brands called Vila Real, ZAP Imóveis and OLX.com. All these brands have one thing in common, the fact of bellowing to the OLX Group, which is a multinational conglomerate of networks of trading platforms, which operates in more than thirty countries around the world, with more than twenty well-known local brands including OLX, OLX Autos, Otomoto and Property24. Its online platforms assist people that want to buy and sell cars, find housing, get jobs, buy and sell household goods, among other services. With more than 20 well-loved local brands including OLX, OLX Autos, Otomoto, and Property24, the group has around eight thousand employees, working across five continents in offices all around the world (OLX Group, 2022).

4.1.3. Porter's five forces

The five forces analysis takes into consideration the impact of new entrants, buyers/customers, suppliers, substitutes, and rivalry among existing players within a specific business or industry. Thus, it is possible to evaluate and score the impact of such forces over Probate for Dummies as follow.

The threat of new entrants is perceived as a medium/ high force affecting the internet business. The threat of new entrants largely depends on the barriers to entry. Key barriers to entry include, economies of scale and money/investment requirements, which in the case of online the business, are both low. In this sense, new entrants comprehend a stronger force over the brand.

The availability of substitutes will influence price levels and profit margins. However, since the online marketplace for heritage is so specific, it is difficult to find substitutes that can offer the same benefits. In addition, the threat of a substitute service could be considered as being low, since current competitors do not reach the specific needs of the niche aimed by the company. However, digital businesses are, in general, fast changing companies that might adapt products and services to follow the needs of the market and try find new ways to bring solutions to the consumers. Moreover, substitute products might emerge from the optimization of the current products present in the market, so as a result, this is considered to be a medium/high force that effects the business.

The competitive rivalry among real estate/assets trading players is expected to be intense, against big and well stablished competitors, which are already have well stablished brands in the market. However, in the specific market niche selected there is no other direct competitor, therefore just indirect concurrence is expected, or the development by the competition of new features in theirs online platforms that is directed to this niche, therefore, competitive rivalry is considered a moderate force.

Regarding the customers bargaining power, it is understood that due to the current absence of websites specialized in the advertisement and trading of heritage goods, this force is imagined low, even if the buyers want to announce their assets in other websites, they will have to deal with the lack of features that solver their particular needs, for instance the longer time that their probate process might take.

The power of suppliers within the online/digital industry is perceived as low, since there are easily reachable alternatives in the market, providing better quality deals at lower prices. In fact, it is easy for any website/blog like Probate for Dummies to switch for better and cheaper suppliers. Moreover, there are several substitute suppliers available in the marketplace, and the switching costs for customers are low, therefore reducing the impact of suppliers over the online business.

Considering the five forces mentioned above, it can be presumed that the level of attractiveness of the market for online trading of inventory goods is medium high as long as the company develops the appropriate marketing strategy. Thus, one possible approach to try to reduce the effects of the first tree main forces that have a medium/high potential to impact the company, might be the development of partnership and affiliation with other companies which offer complementary services or products that might interest the customer, such as online insurance, accountants, psychological

support, among other to be further identified. Thus, the result of this synergies might help mitigate the effect of this forces.

4.1.4. Internal environment

The company's story starts in April 2017, when the founder of the site was looking for information on what to do after the death of a loved one and did not find in one trustful source, a clear, reliable and easy to understand information. So, he created a website with all the steps that someone would have to face in order to complete the administrative obligations and also on how to start over, after such meaningful event in anyone's life. The dream grew and other supporters helped to expand the content of the Probate for Dummies. Today, sixteen thousand users navigate through the website monthly, trying to, safely and conveniently, find the information, instructions and support needed in this singular moment of their lives.

Concerning its mission, the company exists to bring a humanitarian look and support in the moment of intense emotional charge, and provide clarification on bureaucratic demands, as well as offering emotional support to the customer who must start over, after a loved one has been absent. The brand has the following statement to define its intention: "Our purpose is to shape the future of heritage process in Brazil to optimize the hidden value in the succession process".

Regarding the organizational vision, the company aims to become the first and most important website with information on how to deal with the effects of losing a family member, and to help the costumer to generate values out of the assets inherited. Focusing on the easy understanding for the Brazilian customer, and promote the best information, guidelines, and indications on how to act after the death of a loved one.

Finally, the company defines its core values as Humanity, Knowledge, and Resilience. Humanity because the company recognizes that before manuals, laws and regulations, there are people with feeling and emotions trying to solve the challenges imposed to them, furthermore the Knowledge is the base for the effective sequence of processes and demands, and Resilience that is required in the face of adversities that arise along anyone's journey.

From a legal perspective, Probate for Dummies is not a registered company yet, and while this registration is not carried out, the group tries to organize its resources as a company that spreads throughout the internet and begins to place itself in the market. Its organizational structure is still in progress, as there is no departmental division, and the company has only one active member, taking this into account, all tasks are carried out by the same employee, who is in charge of creating the content and dealing with the two outsourced online companies that provide the IT support and the general development of online services. Other than that, the company does not have a head office or a fixed location, the management of the website is carried out at the residence of the company's creator, located in the municipality of Birigui, in the state of São Paulo, Brazil. Lastly, regarding the physical resources, the company has a laptop to edit content and keep the website up to date.

4.1.5. SWOT Matrix

The SWOT matrix below visually presents the items identified as strengths, weaknesses, opportunities and threats that were mapped and possible to identify, both during interviews with stakeholders and with data acquired from the analysis of the internal and external environment.

Table 1. SWOT Matrix

Internal environment	
Strengths	**Weaknesses**
• Being the first website of this niche • Familiar language (colloquial) easy to understand by the regular reader • New features for the specific public • New business model • Low cost to development of new features	• Growing but new brand • Lack of specialists in the team (one person only) • Low capital available
External environment	
Opportunities	**Threats**
• The absence of websites that covers and meet the needs of the targeted audience • Free content about marketing optimization • 220 million inhabitants	• Easy entrance in market for possible competitors • Competitors can copy Business model • Bigger competitor of similar services can adjust their websites to reach our target • Security of the website (Hacker attacks)

Source: Author's own elaboration.

It is neat from the analysis of the matrix above that the main strength identified is the fact of being the first website to identify this niche, on the other hand, as an online business, it is important to take actions to sustain the security and integrity of the service online. Moreover, besides in scope of the site being so restricted to a particular niche, the fact of Brazil having a population of over 220 million people implies in a compelling absolute number of users. Lastly, the major weakness recognized is the fact of the brand being a recent and still unknown, nevertheless this fact can be surpassed by the explicit foundation of the contents based in the updated laws, as well as the search for partnerships to strengthen the brand.

4.2. Marketing objectives

Considering the mission, vision, and values of the company, along with the results of the external and internal analysis of the environment, and yet the insights gathered from the analysis of the interviews, it was defined that the marketing objectives to be pursued by the company, regarding the implementation of this plan, were the following:

O1 – To increase the visibility and awareness of the website on the search engines, (reach at least 100 visits a month).

O2 – Expand visits by 30% annually.

O3 – Reach a monthly conversion rate of 5% for the featured Ads.

O4 – Have quarterly public relations advisory.

O5 – Diversify the services provided, in the second year.

O6 – Build new partnerships associated with the services diversification.

4.3. Central marketing strategy

Based on the marketing objectives previously stablished, a central marketing strategy for the Probate for Dummies was determined, which was represented in terms of the market segmentation, selection of target market and the definition of the positioning for the company.

4.3.1. Segmentation

Concerning the demographics segmentation, the company aims in a segment of consumers with no specific gender, from classes B and C (middle-high and middle) that are aged between twenty-five to fifty-five years old, since usually people within this age range are more susceptible to need the services and have the highest rates of internet usage in Brazil.

Moreover, regarding the psychographics and behavioural segmentation, the consumer that is going to need the services is defined as someone that uses internet and is going through a heritage process or has doubts about the probate process and is willing to advertise the goods inherited, during the process being carry out in the justice or notary's office.

Ultimately, in relation to the geographic segmentation, since the company is based on internet, it is intended to serve costumer from all over Brazil, although the initial and major market might be from users living in one of the 27 states capitals in Brazil, then evolving to the other bigger cities, due to the easier access this portion of the population has to the services that are required to carry on a heritage process, for example, specialized lawyers and notary's offices.

4.3.2. Targeting

The company's market targeting consists of people from B and C class, from 25 to 55 years old, mainly living in the bigger cities of Brazil, who have lost a family member which has left assets that need to be transferred, through an administrative or legal process called the Probate/heritage/Inventory, and are willing to sell those inherited assets, and use the internet to search for answers about how to do this.

4.3.3. Positioning

In relation to the product identification, it can be defined as an online marketplace for trading heritage assets that will take a different approach from the traditional real estate and second-hand trading marketplace, because it will focus on features that better suit the particular needs of the online sale of a heritage asset. Therefore, the brand will offer new and specialized options of the service the

costumer, the main one being the longer time that the heritage process takes in Brazil, compared to the basic features that are current offered by the competition.

Finally, the points of differentiation to be outlined are the intimate and familiar language of the content of the website, along with the focus on the well-being of people that is already going through a loss of a loved one, encompassing whenever possible, the psychological aid for the familiars how need it, in addition to the idea of a lack of necessity of making high selling profits from this situation, and create a mutual beneficial/win-win relationship, linked to the recognition of the emotional charge associated to this targeted customer context.

4.4. Marketing-mix

Resulting from the strategic guidelines developed in the Marketing Central Strategy and the Marketing objectives previously determined, a marketing mix composed by the 7P's (Product, Price, Placement, Promotions, People, Process, Physical Evidence) was defined.

4.4.1. Product

To create value for the targeted consumer, the product to be developed in partnership with the supplier of the website builder, can be defined as an online platform for buying and selling heritage goods. This platform provides the opportunity for sellers and buyers to interact with one another and perform transactions and deals. For the classified ads, the company provides the service of listings of featured ads and free ads. Featured ads will have at least three variations of offerings:

- 3 month featured ads;

- 6 month featured ads;

- 1 year featured ads.

The classified ads must have various product categories, such as vehicles, real estate, artwork, appliances, and furniture. Although, the most revenue generating category is imagined to be real estate, the other categories need to be available, to provide the opportunity to the costumer to announce more assets if necessary, mitigating the chance of the user to migrate to the other second-hand trading websites even for these smaller assets.

In parallel, another source of income for the website is the advertising banners placed by Google AdSense and other companies specialized in online ads, such as PropellerAds and Amazon Native Shopping Ads, where the company grant space and time on the website to third part advertising banners.

4.4.2. Price

Probate for Dummies will follow a freemium model of prices for its listings of classified ads. The logic behind the freemium model is that the main offer is free, but after that, the company offer paid functionality that adds value to the business. Once it is considered that the majority of the users will

not be paying for the listings, however those users who want their ads to be highlighted and listed at the top in search results in the platform's homepage will need to pay minimal fees for their listings. Hence, the pricing in its marketing mix is based on usage of premium services.

According to information from the competition, featured ads have 10 times more replies than free ads (OLX Group, 2022). Moreover, Ads from different product categories will have different prices in different regions of Brazil. The ads will also be available in price packages according to the period that the use intend to adversity the asset, with values to be defined as by the process of development of the digital platform and iteration testing with early adopting users:

- Free pack: With free advertising on the website for 3 months

- Standard pack: Paid advertising on the website for 6 months

- Economy pack: Paid advertising on the website for 18 months

And independently of the advertising pack the user chooses, there is always going to be the possibility to increase the visibility of their ads, with the additional "booster of visits", that is going to be continuously offered to all users and can be repurchased as many times as the user prefers, what will create the chance to monetize even in the free ads.

- Silver booster of visits: Ad stays on top of the listings for 1 day;

- Gold booster of visits: Ad stays on top of the listings for 5 days;

- Pro-Platinum booster of visits: Advertise stays on top of the listings for 15 days.

4.4.3. Promotion

The promotion strategy adopted by Probate for Dummies aims to create awareness in the market about the possibility of buying and selling assets of heritage online, since there was not a stablished business of this kind in Brazil before.

The target of the marketing communications are mainly Brazilian citizens, from B and C socioeconomic classes, from 25 to 55 years old, mainly living in the bigger cities of the country, who have lost a family member that has left assets that need to be transferred, through an administrative or legal process called the Probate/ heritage/Inventory and are willing to sell those inherited assets.

In order to shape the message more appropriately for each customer, according to their moment in the process of interaction with the brand, the communication strategy was divided between two distinct personas, the first one being the so-called Potential Customer, which is someone how searches on internet with doubts about the probate process and not necessarily knows the brand yet, and the second persona is called Current Customer, how is someone who already found the company and, at some stage during the initial interaction with the brand, agreed in providing the personal e-mail in order to receive the email newsletters, new products, new partnerships, promotional sales, updates and advertising from the brand.

There is still a third distinction between the users of the platform, concerning the sellers and the buyers, in this regard it was chosen to have a campaign focused on the sellers, because it is considered that if the brand can attract the sellers, then it becomes attractive to buyers, as they know they will find more products available.

The message of the promotional campaign created by the brand emphasises in how effortless it is to post an online advertisement of a heritage asset, additionally including the benefits of the online-advertisements, and lastly, reinforcing the key features that distinguishes the brand against its competition. This campaign aims not only to sell a product/service, but also to create awareness on consumers and show presence in the market.

The brand's communication mix consists of three digital channels techniques, as well as the development of public relations advisory, which makes possible to reach the off-line market when applicable.

Table 2. Communication mix

Target	Communication Technique	Effort
Potential Customer	Digital Marketing	Content Writing (Blog)
Potential Customer	Digital Marketing	Social Media Marketing
Potential Customer	Digital Marketing	Search Engine Optimization
Potential Customer	Online Advertising	Display advertising (Pay per click)
Current Customer	Online Direct Marketing	E-mail Marketing
Current Customer	Online Direct Marketing	Online Chat
Mass Media	Public Relations	Press Relation Advisory

Source: Author's own elaboration.

4.4.4. Placement

Probate for Dummies is present on a website platform, and additionally there is a second distribution channel prospected, that is going to be a free mobile application, thus in the future, all products and services will be available to the customers on both website and app platforms. Additionally, one office located in Brazil is forecasted as a center of operations for the extra administrative affairs of the business, that follows the increase of the activity of the online platforms.

4.4.5. Physical Evidence

There are four relevant elements that can serve as differentiators in signaling the intended market segment and positioning of the Probate for Dummies, the first being the brand's name, followed by the Blog's writing style, the content structuring of the blog, and the overall appeal of the website. The way these for elements are deployed on the website intend to convey distinctiveness from competitors at the same time as to building a strong brand image and identity.

Starting by the name of the brand, it was chosen to be self-explanatory, intuitive, and transmit the first and main conceptual evidence about the organization's offering, since it is how the inheriting assets process is called in Brazil, both in the official juridical means, and in the more familiar informal context.

The second element concerns the writing style, that needs be in accordance with the heavy emotional charge characteristics of the reader that is going through the inheriting process, thus a calm, pacific and yet informative tone needs to be applied in the text, to provide the answer to the users' questions, in a language that the ordinary reader can understand.

In the sequence, there is the structure of the contents, since the articles are based on federal, fiscal and state laws, the references and links to the main websites of these institutions involved in the maintenance of the laws, such as state courts, lawyers associations, finance ministries, are elements that needs to be present and easily visible to the reader, so that the content of the article can be perceived in a way as reliable as the websites of these credible public institutions. In this same instance, the content of the blog must be updated regularly, to follow the updates and changes in legislation and taxation every year, and in some cases every month, these measures help to show the seriousness and reliability of the content.

Lastly, the overall appeal of the website and Interface of the trading platform, meaning the visual elements, images, figures, and colors that needs to be carefully selected to reflect comfort and peaceful, with light colors, images of family memories and figures associated with good moments in general. On the other hand, the section of the sales platform needs to be more rational, objective, purpose oriented and user-friendly, and focused on the user's experience.

4.4.6. Process

Probate for Dummies will have two main processes in place, both begin with the buyer or seller searching on internet about the probate procedure or about investments in real state, and finding answers in the company´s website, this step is direct related to the organic traffic generated by the content published in the articles of blog.

Then, there is the process of the buyer interested in the listings in the trading platform, this part of the process is designed to be as simple as possible. Buyers can search, with simple clicks, the products on the website (or in the future, on the app) based on asset categories, geographic region, price range, relevance, among others. Consequently, in the event of the buyer being interested in a product, he or she can connect the seller in two different ways, either by clicking on "Make an Offer"

button, then entering the price he/she is willing to pay, or the other method is by the "Chat with the seller" option, which opens a direct conversational chat between the parts. The buyers can also share their phone number to contact the seller outside the website or app.

And lastly, the process for the ones interested in selling, the user must click on "Submit a Free Ad" button, enter the product details, include the title of the add, photographs, and other details of the product. Then, once the ad is posted, the seller receives a message which contains a link for "pay and sell faster" option, which shows the additional paid "booster of visits" options. If interested, the seller can click on that offer, and will be directed to a checkout payment page.

4.5. Operational plan

In accordance with the marketing objectives defined and considering the strategy to be adopted in this plan, several actions and targets were defined to be carried out within a period of twelve months. The following table shows each objective and its corresponding actions, as well as the timing and the costs foreseen for the implementation.

Table 3. Marketing Actions and Budget

OBJECTIVE	WHAT TO DO	MARKET MIX VARIABLE	WHEN	COST
O1 - Reach at least 100 visits a month	**A1.** Search trending Key words on Google search console	Promotion	Quarterly	€ -
	A2. Upload 2 articles monthly with at 500 words	Promotion	Jan to Jun	€ -
	A3. To apply updates to the security of the website	Product	Jan to Dec	€ 120,00
O2 - Expand visits by 5% monthly	**A4.** Continuous improvement of SEO strategies	Promotion	Every 2 months	€ 120,00
	A5. Apply Google Adwords/Adsense/Facebook Ads	Promotion	Jul to Dec	€ 300,00
	A6. Upload 4 articles monthly with at least 500 words	Promotion	Jul to Dec	€ -
O3 - Reach 5% Conversion Rate for the featured Ads	**A7.** Development of and improvement of the Trading Platform. Testing and experiments	Product	Jul to Dec	€ 1 000,00
	A8. Offer free ads and 3 types of featured ads	Price	Jul to Dec	€ -
O4 - Public relations advisory	**A9.** Send press releases to online/offline vehicles	Promotion	Quarterly	€ -
O5 - Diversify the services provided	**A10.** Creating a section in the plataform for Emotional and Psicological suport for clients	Product	Long-term: 2nd yr	€ 700,00
	A11. Implementation of an online chat, for taking doubts of costumers	Promotion	Long-term: 2nd yr	€ 700,00
O6 - Build new partnerships	**A12.** Search for companies/professionals that might Fit in the new services	Product	Long-term:3rd yr	€ -
	A13. Negotiating partnership conditions	Product	Long-term: 3rd yr	€ -
	A14. Development of new features with the new partners, on the website	Product	Long-term: 3rd yr	€ 500,00

Total **€ 3 440,00**

Source: Author's own elaboration.

The short-term actions to be carried out for this marketing plan are expected to start in 2022, in January, and to be concluded in December of the same year, however there are still the consideration of the so-called long-term actions, which are actions already predicted for the future strategy of the brand. Thus, in the figure below, it is possible to verify the schedule as well as the responsible for the actions to be executed.

Table 4. Marketing Schedule of Actions

ACTIONS	Responsable	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
A1. Search on google search console for trending Key words	IT/Marketing	▓			▓			▓			▓		
A2. To produce two articles with at least 500 words	Marketing	▓	▓	▓	▓	▓	▓						
A3. Apply updates to the security of the website once a month	IT	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓	▓
A4. Continuous improvement of SEO strategies	IT/Marketing	▓		▓		▓		▓		▓		▓	
A5. Apply Google Adwords/Adsense/Facebook Ads	Marketing							▓	▓	▓	▓	▓	▓
A6. To produce 4 articles with at least 500 words	Marketing							▓	▓	▓	▓	▓	▓
A7. Development of and improvement Of Plataform	IT/Marketing							▓	▓	▓	▓	▓	▓
A8. Offer free and featured ads	Marketing							▓	▓	▓	▓	▓	▓
A9. Send press release to online/offline vehicles	Marketing			▓			▓			▓			▓
A10. Creating an Emotional and Psicological suport for clients	Marketing	Long-term: after 2nd year											
A11. Implementation of an online chat, customers doubts	IT/Marketing	Long-term: after 2nd year											
A12. Search companies/professionals for new services	Marketing	Long-term: after 3rd year											
A13. Negotiating partnership conditions	Marketing	Long-term: after 3rd year											
A14. Development of new features with the new partners	IT/Marketing	Long-term: after 3rd year											

Source: Author's own elaboration.

Conclusions, Limitations and Future Research Lines

The main objective of this research was to investigate and define the appropriate marketing strategy and elaborate a marketing plan for a recently created Brazilian online business called Probate for Dummies. The origin of this research reflects the aspiration of answering questions such as "How to define the marketing plan for a company at an early stage of its existence, but with a very broad target audience and in a country as large as Brazil?" and even "What is the efficient way to use all the marketing theories and convert them into a practical application for a new small business with virtually non-existent resources?".

Therefore, among the main results unfolded by this study, it was found that the best opportunity regarding the environment of the company lays on the high volume and size of the heritage assets market in Brazil, along with the fact of being the first company to identify and specialize itself in this market niche. Such opportunities underpin the company's decision to pursue a market penetration strategy through the creation of a new online resale service for inventory goods. This strategy is financially sustainable since the time taken to carry out an inventory lawsuit in Brazil is an average greater than two years, which makes the customer retention period longer, when compared to the

period of conventional online second-hand assets sales. Moreover, to explore the competitive advantage of being the first to explore this segment, the focus on content marketing must be considered a top priority for the brand, and along with communication campaigns in social media, are the strategy selected to reach out to the targeted clients and is considered to be the key to acquiring as much market share as possible and establishing yourself as the authority in this niche, before the competition recognizes the potential of this new market.

On the other hand, the cyber-security of the website was exposed as the major vulnerability that threatens the business, followed by the fact of it being a new brand, what can cause resistance from the initial clients. However, following its identification, mitigation measurements for both cases were included in the operational plan created for the business, in particular the hiring of a paid security service instead of the current free version current in operation, and development of a promotional and institutional video of company, attempting to transmit a more credible image of the brand in the user's mind.

Therefore, by accounting the totality of data acquired in this study, that allowed for the comprehensive understanding of the topic, and enabled the exploration of the general phenomena involving the business, its environment, and stakeholders' points of view, which allowed the constitution of the conceptual framework of this marketing plan for this company, it is understood that the research objective was entirely accomplished. Nonetheless, besides the reliable managerial data obtained and the knowledge developed to this particular company, this research also contributes to all new and small online enterprises, with or without restricted budgetary resources, that in the early stages of its operation in any digital services market, which need one example of methodological framework about a practical strategic and marketing plan development or are considering the insertion of a new service in its portfolio.

Lastly, in spite of all the mentioned considerations, there are limitations in this study that could be addressed in future researches, in particular adoption of a sample composed by specialists who practice their professional activities in the same Brazilian state, namely the state of São Paulo, and even though this state is the most populous and richest in Brazil, it does not capture particularities and possible opportunities that professionals from other states may know, so in the future, when the company's resources allow an expansion of this sample , having professionals representing all twenty-seven Brazilian federative units can present new opportunities for readjusting the company's strategy, or even creating new products.

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Appendix

Appendix – A   Semi-structured exploratory interviews

Interview guide – Owner (Mr. Bruni)

This exploratory interview aims to acquire essential insights about the brand Probate for Dummies, from its owner's perspective.

This methodological instrument is part of an investigation of the master's degree in management, with specialisation in business management, submitted to the *Instituto Politécnico de Bragança*.

The estimated extent of the interview is approximately 60-90 minutes.

1. Brief discussion about the research objectives and the purpose of the case study.

2. Semi-structured interview, with the following questions:

Organizational Diagnoses

- How did the idea of starting the company come about? What were the main motivations?

- What is the mission, vision and values of the company?

- How many employees work for company?

- What are the current Equipment/Facilities that the company operates?

- What are the company's strengths and weaknesses?

- What are the company's threats and opportunities?

- How many vendors/providers does Probate for Dummies work with? Which are the services offered?

- How are the services distributed? Which channels are used?

- Who do you consider to be the company's main competitors?

- In relation to the competition, what advantages and disadvantages does the company have?

Central Marketing Strategy

- How is the company's audience segmented?

- How do you characterize the market that the company is inserted, that is, in your opinion, who are the main groups of visitors: professionals, senior groups, etc.?

- How do you characterize the company's target audience?

- What type of visitor usually uses the Probate for Dummies website (characterize by gender, age, geographic origin, income, professions)?

- How is the company's positioning defined? In the market in which it is inserted, how do you think the brand is positioned against the competition, that is, how should this company be seen by its customer and what does it offer that is different from the competition?

- How do you characterize website's visitors in terms of behavior and lifestyles or interests?

- What are the marketing goals for the brand in the next one-year period, and in two years from now?

- What should be the main, or at least three main marketing objectives, to achieve the desired goals?

Marketing-Mix

- What services are currently offered to your customers? What is intend next?

- What criteria is applied when setting the price of the service provided?

- What channels of communication does the company use to get in touch with customers?

- How is the brand advertised?

- Does the company have any social media presence?

- What do you think leads a potential client to look for the services provided by the company?

- What do you want the company's image to be transmitted to customers?

- Is contact with old customers who are no longer looking for the brand maintained?

- How many physical stores does the company have? Do you think about opening any in the future?

- What are the places where the services to be offered are currently available?

- What are the processes carried out to serve a customer?

Future expectations

- How do you define the company's strategy in the short, medium and long term?

- What do you think the company should improve to achieve its goals?

- Do you intend to identify new services in the future?

- How do you see the company at the end of two years from now?

Appendix – B   Semi-structured exploratory interviews

Interview guide – Specialists (Mrs. Barbosa, Mr. Alexander, Mr. Magno)

This exploratory interview aims to acquire essential insights about the brand Probate for Dummies, from its owner's perspective.

This methodological instrument is part of an investigation of the master's degree in management, with specialisation in business management, submitted to the *Instituto Politécnico de Bragança*.

The estimated extent of the interview is approximately 60-90 minutes.

1. Brief discussion about the research objectives and the purpose of the case study.

2. Open conversation about the company and the history of Probate for Dummies.

3. When needed, previous answers/analysis of the owner/researcher were presented to the respondent

4. Semi-structured interview, with the following questions:

Organizational Diagnoses

- Please comment the mission, vision and values of the company.

- Do you identify any strengths and weakness?

- Can you recognize possible threats and opportunities?

- Do you identify possible vendors, providers and partners for the business?

- What about the communication and distribution channels used by company?

- Who do you consider to be the company's main competitors?

- Do you have suggestions to deal with competition?

-What advantages and disadvantages do the company have over the competition?

Central Marketing Strategy

- Who are the main groups of visitors: professionals, senior groups, etc.?

- How do you characterize the company's target audience?

- What type of clients do you have in the probate context (gender, age, income, professions)?

- How should this company be seen by its customer and what does it offer that is different from the competition?

- How do you characterize you clients of probate context in terms of behaviour or interests?

- What should be the main, or at least three main marketing objectives, to achieve the desired goals?

Marketing-Mix

- What services do you think can be interesting the target audience previously discussed?

- Comment on the possible pricing criteria for the service provided.

- What might be the best channels of communication with customers?

- How do you think the dissemination of content on social networks is relevant?

- Comment about the online services, what are the pros and cons?

Future expectations

- How do you see this market in the medium and long term?

- What do you think the company should improve to achieve its goals?

- Which could be new services in the future?