

Mercatus Concierge — Cold-Call Pitch Playbook

Product overview + Thandi simulation script (recruitment / agency buyer)

"Your digital footprint. One concierge."

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1. Product overview

Mercatus Concierge is a high-end app builder and agency desk built for cold-call demos and portfolio video. It gives a shop or agency one place to see their own work rebuilt as a live, branded product — then hands them the video and this PDF as leave-behinds.

The frame: demo → video → PDF → pitch. We rebuild real work for the buyer (shops, recruitment and creative agencies), record it, document it, and pitch it while the demo is still warm. Brand system: Cartel red / black / cream.

Live surfaces

- **Marketing site (local):** <http://127.0.0.1:8766/>
- **Portfolio Concierge:** <https://mensmercatus.online/apps/makedas-canvas/> (also /apps/mercatus-canvas/)
- **Assist robot:** <https://mensmercatus.online/apps/mercatus-assist/>

The desks

- **Ops Launch** — stand up the runbook and keep it tight.
- **Role Kits** — role-ready kits for agency and client delivery (secondary on the marketing page, but core to agency buyers).
- **Client Portal** — a shared surface for status, assets and decisions.
- **Launch Path** — from demo to live without the fog.
- **Deploy Path** — ship the build where it belongs.
- **Meeting Desk** — walkthroughs that stay on product.
- **Workspace** — the day desk: files, Assists, next move.
- **Assist robot** — Cartel policy / product coach (.NET). “Talk with Assist” sits on the Concierge hero and deep-links to the live Assist.

2. Thandi simulation — pitch script

Persona: Thandi is a *simulated* reception / operations lead at a South African recruitment or creative agency. She is a cold-call practice persona, not a real recorded client. The lines below are the **practice script** used in the **Thandi simulation** — they are what the caller says, with expected beats from the buyer described, not transcribed.

Opening hook

CALLER Hi, is that Thandi? Sorry to catch you mid-day — I'll be quick. My name is Katlego from Mens Mercatus.

CALLER We build one concierge desk that holds an agency's whole digital footprint — and sells your work before the call even ends.

CALLER Could I have 90 seconds to show you what that looks like for an agency like yours? If it's not relevant, you can cut me off.

Beat: wait for permission. If she says “now's bad”, ask for a specific 10-minute slot and move straight to Close.

Demo walk

CALLER I'll send you a link — open it on your phone. This is the Concierge canvas: mensmercatus.online/apps/makedas-canvas.

CALLER Top of the screen — “Talk with Assist”. Ask it anything about the product or policy; it answers live. That's your front desk that never goes to lunch.

CALLER Scroll down. **Ops Launch** — your runbook for every new client, in one place. **Role Kits** — role-ready packs for each placement or brief, so your consultants aren't rebuilding the same pack every week.

CALLER **Client Portal** — your client sees status, assets and decisions without a WhatsApp chase. **Launch Path** and **Deploy Path** — how a demo becomes the live build, without the fog.

CALLER **Meeting Desk** — walkthroughs that stay on product. And **Workspace** — your day desk: files, Assists, next move.

CALLER That's the whole idea: your digital footprint, one concierge.

Objections

Objection: “We already have Notion / WhatsApp.”

CALLER Makes sense — most agencies do. Those hold the notes; Concierge is what your client actually sees. Keep Notion internal — this is the desk that wins the brief.

Objection: “No budget.”

CALLER Fair. The seat is monthly and it's framed against one missed placement fee — if it saves one placement a year, it's paid. That's why we start with a two-week pilot, so you see it before you spend.

Objection: “Send an email.”

CALLER Happy to. So it doesn't get buried — who besides you should get it, and can I hold 15 minutes on Thursday for a Meeting Desk walkthrough to go through it together?

Objection: “POPIA / client data.”

CALLER Good question, and the right one. Demos use minimal or dummy personal info, client data stays in the Client Portal behind access control, and there's an export and erasure path. I'll put the privacy points in the PDF so your compliance person can check them.

Close

CALLER Here's what I suggest: a two-week pilot on one desk — Client Portal or Role Kits, whichever hurts most right now.

CALLER Who besides you signs off on something like this? (*Confirm the decision-maker — who owns the yes.*)

CALLER Can I book a Meeting Desk walkthrough with you and them — Tuesday or Thursday?

CALLER I'll send the playbook PDF and the Concierge link right after this call. Thanks, Thandi.

3. Timing versions

90-second pitch

- **0:00–0:15 Hook** — name, company, “one concierge desk that holds your digital footprint and sells your work before the call ends.” Ask for 90 seconds.
- **0:15–0:45 One proof desk** — pick the buyer’s pain: Client Portal (client chasing) or Role Kits (repeat packs). Show only that desk.
- **0:45–1:05 Assist** — open “Talk with Assist” on the hero; one live question, one live answer.
- **1:05–1:30 Pilot close** — “Less than one missed placement fee. Two-week pilot. Who else signs off? Tuesday or Thursday for a walkthrough?” Send PDF + link.

6-minute pitch

- **0:00–0:30 Hook + permission** — footprint line; ask before demoing.
- **0:30–1:15 Pain discovery** — “How do clients see status today? How many placements or demos slipped last quarter?” Listen; don’t pitch.
- **1:15–2:00 Concierge hero + Assist** — open the canvas on phone; live Assist question.
- **2:00–2:45 Ops Launch → Role Kits** — runbook + role-ready kits. *Objection beat: “We have Notion.”*
- **2:45–3:30 Client Portal** — status, assets, decisions in one shared surface. *Objection beat: POPIA / client data.*
- **3:30–4:15 Launch Path → Deploy Path** — demo to live, shipped where it belongs.
- **4:15–4:45 Meeting Desk → Workspace** — walkthroughs on product; day desk. End on the tagline.
- **4:45–5:30 Price framing** — monthly seat, less than one missed placement fee. *Objection beat: “No budget.”*
- **5:30–6:00 Close** — two-week pilot, confirm decision-maker, book Meeting Desk walkthrough, send PDF + link. *Objection beat: “Send an email.”*

4. Key learnings (simulation)

Practice notes from the Thandi cold-call simulation — not results from real client calls.

What worked

- Opening with the digital footprint / one-desk line — short and easy to repeat back.
- Showing the live Assist — the moment the product feels real.
- Tying price to a missed placement fee — reframes cost in the buyer’s own numbers.
- Offering a two-week pilot — lowers the risk of saying yes.

What fell flat

- Feature laundry lists — reading all eight desks lost attention.
- Talking over Thandi — missed her cues and objections.
- Diving into the tech stack (.NET, hosting) before establishing pain.
- An unclear next step — calls ended without a booked slot.

Improvements

- Lead with buyer pain: placements and client demos.
- Go one desk deep, then park the rest (“I’ll show the others in the walkthrough”).
- Ask permission before the demo.
- Confirm the decision-maker early.
- Always leave the PDF path + a booking CTA.

5. Contractor model — video shooters

Video shooters and editors who produce client demo videos work on a performance basis:

- **Paid on client payment received** — not on shoot day.
- **Agreed split %** of the video / demo package, set per engagement in writing.
- **Clear deliverables:** shot list taken from the Concierge demo; Cartel brand (red / black / cream); vertical cut plus 16:9 where needed.
- **No upfront day-rate** for cold-call pipeline work unless separately agreed.
- Contractors sign NDA / processing terms before receiving client material (see Section 7).

6. Pricing framing

Pricing is framed qualitatively in calls — no sticker price is quoted on the cold call.

- **Monthly Concierge seat.**
- Framed as **less than one missed placement fee** for a recruitment buyer.
- **Two-week pilot** before the full seat.
- The seat sells access to the desks + Assist + the demo / video workflow.
- **Custom client builds** are quoted separately.

7. POPIA / data privacy talking points

SA-aware talking points for sales conversations — not legal advice. Refer formal questions to the buyer’s information officer or counsel.

- **Purpose limitation** — personal information is used only for the purpose it was given for; demos minimise personal information and use dummy data where possible.
- **No SA ID numbers or SASSA credentials** in Assist logs, demos or pitches — ever.
- **Client data stays in the Client Portal** with access control, plus an export and erasure path on request.
- **Contractors** work under NDA / processing terms; shoot footage is treated as client confidential.
- **Honest labelling** — DEMO vs LIVE clearly marked on the public portfolio.

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