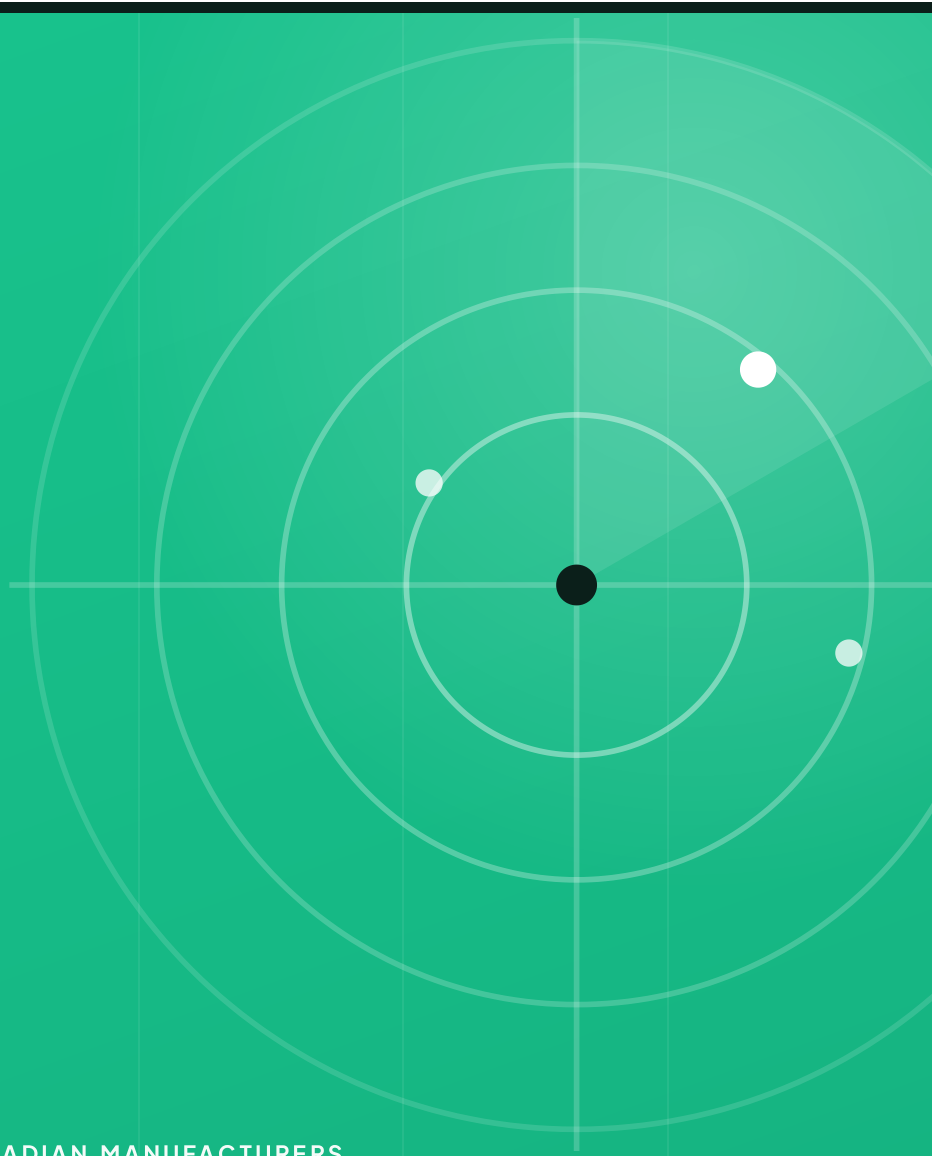


ubico



A PRACTICAL 90-DAY PLAN FOR CANADIAN MANUFACTURERS

PLAYBOOK

Tariff Pivot.

How to diversify revenue: find new buyers, unlock your existing database and run 1-1 outreach that gets replies, in 5 practical steps.

A NOTE FROM OUR CEO

Canadian manufacturers don't have a product problem. They have a pipeline problem.

For most of the manufacturers we work with, new business has come from the same three places for years: referrals, trade shows and a few large accounts that carry the quarter. That worked when one market bought most of what Canada makes. It is a fragile model when that market gets less predictable.

The good news is that your next customers are rarely a mystery. Many of them already sit in your quoting system, your old trade-show scans and the inboxes of reps who have since moved on. The rest are plants and distributors a few hours down the highway, in Ontario, Quebec, the Midwest or the Northeast, who buy exactly what you make and have simply never heard from you.

That is the work Ubico does. We identify the right buyers, engage them one-to-one with messages that read like they were written by a person who did the homework, and hand the interested replies to your sales team. We never spray and pray with bought lists in a newsletter tool.

This playbook lays out the exact 90-day sequence we use with manufacturers. You can run it yourself. If you would rather run it with us, the offer at the end removes the setup cost so the only thing you pay for is the data and credits you use.

Canadians have always been good at building things. This is about building one more door.

Phil Kwiatkowski

CEO, Ubico

"Your next customers aren't a mystery. They're in your database, and a few hours down the highway."

WHY NOW

67.3%

US share of Canada's merchandise exports in October 2025, down from roughly three-quarters in prior years (Statistics Canada). Buyers are shifting, and so is the opportunity.

The Bank of Canada notes that redirecting trade to new markets takes time. The companies that start building pipeline early get there first.

IN THIS GUIDE

- The 90-day plan at a glance
- 5 actions, each with what, why, how and how to measure
- Funding that can offset lead-generation costs
- Our offer for Canadian manufacturers
- Three ways to run it, compared

THE PLAN AT A GLANCE

Five actions. One new channel.

Each action builds on the one before it. Together they turn a quiet database and a list of target markets into a weekly flow of conversations for your sales team.

#	ACTION	START	WHAT TO DO	WHY IT MATTERS	HOW TO MEASURE
1	Define your Ideal Buyer Profile	Week 1	Write down the industries, regions, company sizes and roles that buy from you, and the triggers that make them buy.	Every list, message and campaign after this depends on it.	A one-page profile your sales team agrees with.
2	Unlock your existing database	Weeks 1-3	Pull contacts from ERP, CRM and inboxes. Clean, verify, re-find people who moved, and segment.	The people who already know you reply first and buy fastest.	Verified contacts by segment; replies from past customers and lost quotes.
3	Find new buyers in new markets	Weeks 2-4	Build account lists by company fit and buying signals, then find 3-5 decision makers per account.	Diversification needs new names, not just new messages.	Qualified accounts per region; contacts per account.
4	Run 1-1 email campaigns	Weeks 3+	Plain-text, personal sequences per audience, sent from a warmed secondary domain, in French for Quebec.	One-to-one outreach earns replies; mass email earns unsubscribes.	Reply rate and positive replies, not opens.
5	Hand off to sales, every week	Weeks 4+	Categorize replies, answer the same day, and give reps a Monday list of engaged accounts.	Pipeline is created when a rep acts on a warm reply.	Meetings booked, quotes issued, deals opened.

THE ORDER MATTERS

Define who you want. Start with the people who already know you. Add new buyers. Talk to them one at a time. Make sure sales acts on every warm reply. Skip a step and the next one gets harder.

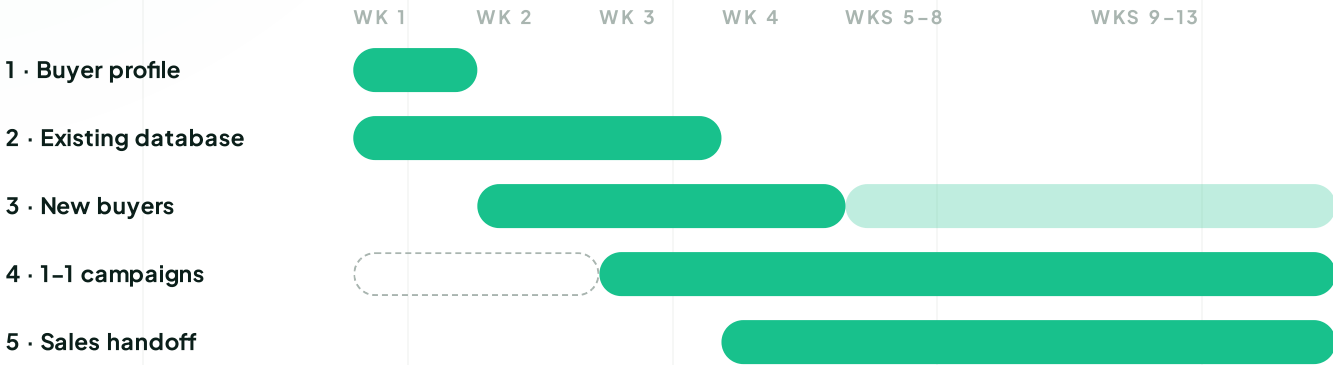
TIME REQUIRED FROM YOU

About 2 hours a week from an owner or sales lead to approve messaging and act on replies. The rest is setup and execution.

WEEK BY WEEK

What the 90 days look like.

Campaigns are live by week 4. By day 90 you should know which markets, segments and messages work, and have a repeatable weekly rhythm.



Dashed: sending domain warm-up (about 3 weeks). Light: ongoing list refresh.

DAYS 1-30

Foundation

- Buyer profile signed off
- Database exported, cleaned and segmented
- Secondary domain warming
- First new-market account lists
- First campaigns approved and live

DAYS 31-60

Momentum

- 3-5 campaigns running in parallel
- A/B tests on subject lines and asks
- Weekly engaged-accounts list to sales
- French sequences live for Quebec
- Second region or vertical added

DAYS 61-90

Repeatable

- Double down on best segments
- Retire messages that don't get replies
- "Not now" replies scheduled to re-engage
- Pipeline reviewed against the profile
- Plan for the next 90 days

ACTION 1

Define your Ideal Buyer Profile.

Before you find anyone new, write down who you are looking for. One page, agreed with sales, so every list and message points the same way.

WHAT

A short description of the companies and people most likely to buy from you, and the moments when they are most likely to buy.

WHY

Most outreach fails before the first email is written, because the list is too broad. A tight profile means fewer, better accounts, and messages that sound like you understand their plant.

HOW

- 1

Industries
Which verticals buy most, and which buy at the best margin? Name sub-industries, not just "food".
- 2

Regions
Where can you ship, install and service profitably? Province, state, or a drive-time radius.
- 3

Company size
Employee or revenue range where deals close. Too small can't afford you; too big has a vendor list you aren't on.
- 4

Buying roles
Who signs, who specifies, who complains: plant manager, maintenance, engineering, procurement, owner.
- 5

Triggers
New line, expansion, new facility, a recall, a retirement, a competitor exit, a new import program.
- 6

Proof
Your 2–3 best customer stories for this profile, with a number in each.

EXAMPLE PROFILE

Draft v1

Industry	Food & beverage processors
Regions	Ontario Quebec US Northeast
Size	50–500 employees
Roles	Plant manager · Maintenance manager · Procurement · Owner
Triggers	New line or expansion · New facility · Hiring for maintenance
Exclude	Current customers · Competitors · Distributors already covered
Proof	"Cut changeover time 30% at a Quebec dairy"

START THIS WEEK

List your 10 best customers. For each, write the industry, size, region, who signed and what triggered the purchase. The pattern is your profile.

HOW TO MEASURE

- A one-page profile your sales team agrees with
- One profile per market if you serve more than one
- Reviewed again at day 60 against real replies

ACTION 2

Unlock more from your existing database.

Your fastest new revenue usually comes from people who already know you: past customers, lost quotes and trade-show contacts nobody called back.

WHAT

Pull every contact you own into one place, clean it, refresh it and split it into segments that each get their own message.

WHY

A database that hasn't been touched in two years decays fast: people change jobs, companies get acquired, emails bounce. But the relationships are still there. A lost quote from 18 months ago is often the warmest lead you have.

HOW

- 1 Export everything**
ERP customer lists, CRM, quoting tool, trade-show scans, reps' inboxes and spreadsheets.
- 2 Dedupe and verify**
Merge duplicates and verify every email before sending. Bounces hurt deliverability for everyone.
- 3 Re-find people who moved**
Replace contacts who left with their successor, and follow the ones who left to their new company.
- 4 Enrich**
Add title, company size, industry and location so you can segment properly.
- 5 Segment**
Past customers · Lost quotes (last 24 months) · Trade-show contacts · Contacts who opened 5+ emails in 60 days.
- 6 One message per segment**
A lost quote gets a different email than a customer who bought in 2021.

SEGMENTS

Example

Past customers No order in 18+ months	412
Lost quotes Last 24 months	286
Trade-show scans Never contacted	1,140
Highly engaged 5+ opens in 60 days	73

Illustrative numbers.

KNOW THE RULES: CASL

Canada's anti-spam law allows implied consent for **2 years after a purchase** and about **6 months after an inquiry** or quote request.

Every email needs clear sender identification and a working unsubscribe. When in doubt, ask for consent in the first message.

HOW TO MEASURE

- Verified contacts per segment
- Bounce rate under 2%
- Replies from past customers and lost quotes

ACTION 3

Find new buyers in new markets.

Diversifying revenue means new names. Build account lists by fit first, then add the people, then look for signals that say "now".

WHAT

A researched list of companies that match your profile in each target market, with 3-5 decision makers per account.

HOW

- 1 Company fit first**
Qualify on what the company actually does, using its website description, not just an industry code.
- 2 Exclusions**
Remove current customers, competitors and accounts owned by a distributor or rep.
- 3 Research qualification**
Check each account for the details that matter to you: lines, products, certifications, facility count.
- 4 Buying signals**
Companies importing products like yours into North America, new facilities or expansions, hiring, and visits to your website.
- 5 3-5 contacts per account**
Reach the plant, the engineer and the buyer. One contact per account is a coin flip.

FUNDING: CANEXPORT SMES

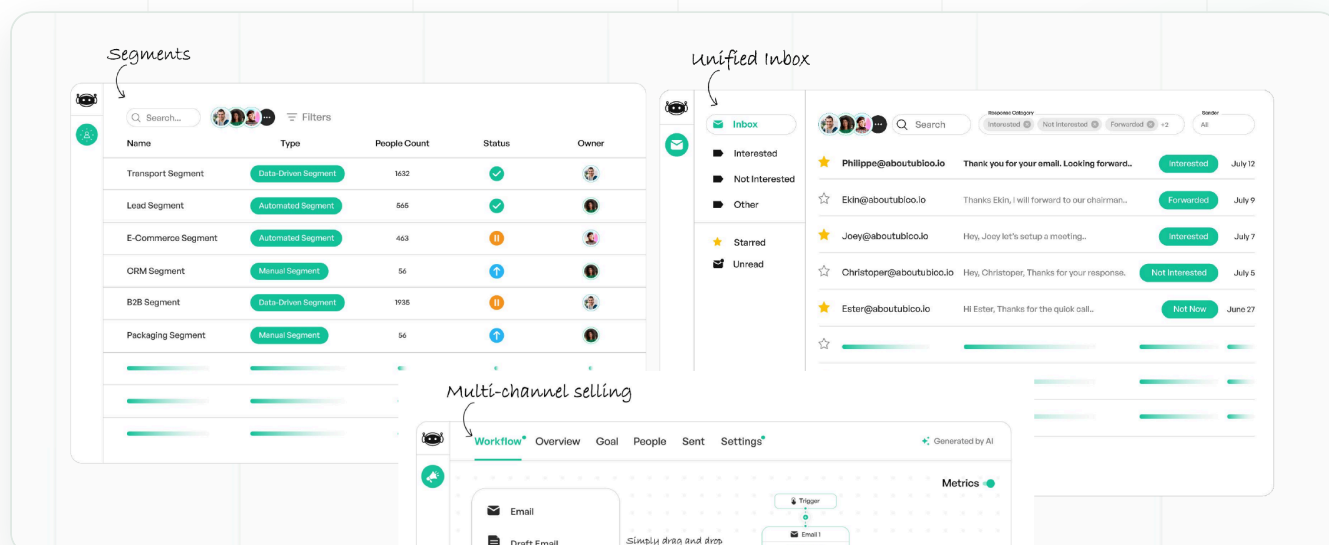
Global Affairs Canada can reimburse **up to 50%** of eligible export-development costs, with **\$10K-\$50K** per project, for companies with **3-500 employees** and **\$300K-\$100M** in revenue.

Lead-generation services that identify key contacts in a target market can be eligible. Software subscriptions are not. US and non-US markets are treated separately.

Check eligibility with the program before you commit spend.

HOW TO MEASURE

- Qualified accounts per region
- Decision makers per account (target 3+)
- Accounts showing a buying signal



Segments, unified inbox and multi-channel workflows in Ubico.

ACTION 4

Run 1-1 email campaigns that get replies.

Skip the newsletter. Send short, plain emails from a real person to one buyer at a time, about one problem they likely have.

WHY

Industrial buyers ignore marketing email but answer a relevant note from a person. One-to-one outreach consistently earns far more replies than a blast, and protects your main domain's reputation.

HOW

- 1 Use a secondary domain**
Send from a lookalike domain and warm it up for about 3 weeks before campaigns start.
- 2 Plain text, from a person**
Skip images, banners and tracking-heavy templates. Use a name, a title and a phone number.
- 3 French for Quebec**
Write natively in French for Quebec targets. Translated English reads like a translation.
- 4 One audience per campaign**
Region, industry and role in each campaign, so the message can be specific.
- 5 3-4 steps, one ask**
Spread over 2-3 weeks. Each step adds something new. Every email asks one simple question.
- 6 A/B test**
Two subject lines and two asks per campaign. Keep the winner, replace the loser.
- 7 Business-hours pacing**
Send gradually during the recipient's working day, not 500 at once.

KEEP EACH EMAIL TO FOUR PARTS

- 1 A specific observation**
About their company, plant or market.
- 2 The problem you solve**
In their words, not yours.
- 3 A similar customer's result**
With a number.
- 4 One question**
Easy to answer in one line.

Subject: **changeovers on the new line**

Hi Marc, saw that your Laval plant is adding a second filling line this year.

Most dairies we work with lose 40+ minutes per changeover once a second SKU family is added. A processor near Drummondville cut that by 30% in the first quarter.

Is changeover time on your radar for the new line?

Illustrative example.

HOW TO MEASURE

Reply rate and positive replies, not opens. Open tracking is unreliable and tells you nothing about intent.

ACTION 5

Hand off to sales, every week.

Campaigns create interest. Pipeline only exists when a rep picks up the phone. Make the handoff a weekly habit your reps can count on.

HOW

- 1

Categorize every reply
Interested · Not now · Wrong person (with referral) · Not a fit · Unsubscribe.
- 2

Same-day response
Interested replies get a human answer the same day and a deal in the CRM.
- 3

Monday engaged list
Every Monday, reps get accounts that opened, clicked or visited the site, with direct phone numbers.
- 4

Re-engage "not now"
Schedule a new touch in 60–90 days with something new to say.
- 5

Weekly website visitors
Review which target companies visited your site and add them to the right campaign.

KEEP IT SIMPLE

One owner for replies. One 30-minute meeting a week. One shared list. If a warm reply waits three days, it usually goes cold.

HOW TO MEASURE

- Time from positive reply to response
- Meetings booked per week
- Quotes issued and deals opened
- Pipeline value by segment and market

Search...

Columns

Live Paused Draft Select...

+ Campaign

Name	Sent	Open	Reply	Conversion	Progress	Activity	Owner	Status	Actions
Summer 2026 outreach Updated 17 days ago	1216	80 %	9 %	47 %				Live	...
Re Engagement Q4 2026 Updated 17 days ago	693	89 %	3 %	67 %				Live	...
Atlantic Canada Updated 1 month ago	904	81 %	5 %	75 %				Live	...
Quebec - French Outreach - F... Updated 1 month ago	2176	76 %	6 %	54 %				Live	...
2025 Major Quebec top list Updated 1 month ago	855	77 %	3 %	86 %				Live	...
Canada Q4 reach-out Updated 4 months ago	2525	78 %	3 %	64 %				Live	...
BC Top 100 Updated 4 months ago	134	80 %	0 %	0 %				Paused	...
Western Canada prospects Updated 4 months ago	388	88 %	3 %	60 %				Paused	...
Quebec City Area April 2026 - ... Updated 5 months ago	0	0 %	0 %	0 %				Draft	...
Kick Off Quebec Updated 5 months ago	0	0 %	0 %	0 %				Paused	...
Forklift campaign (draft) Updated 6 months ago	0	0 %	0 %	0 %				Draft	...
Territory campaign Updated 6 months ago	372	58 %	4 %	0 %				Live	...
Quebec - French Outreach Updated 6 months ago	2368	68 %	7 %	48 %				Live	...

A Canadian equipment distributor running parallel campaigns by region and language. Names anonymized.

FOR CANADIAN MANUFACTURERS BUILDING A NEW REVENUE CHANNEL

Ubico will waive the \$2,500 onboarding and management fee.

You only pay for the data and credits in your subscription. We run the five actions in this playbook with you, with dedicated support for the entire term.

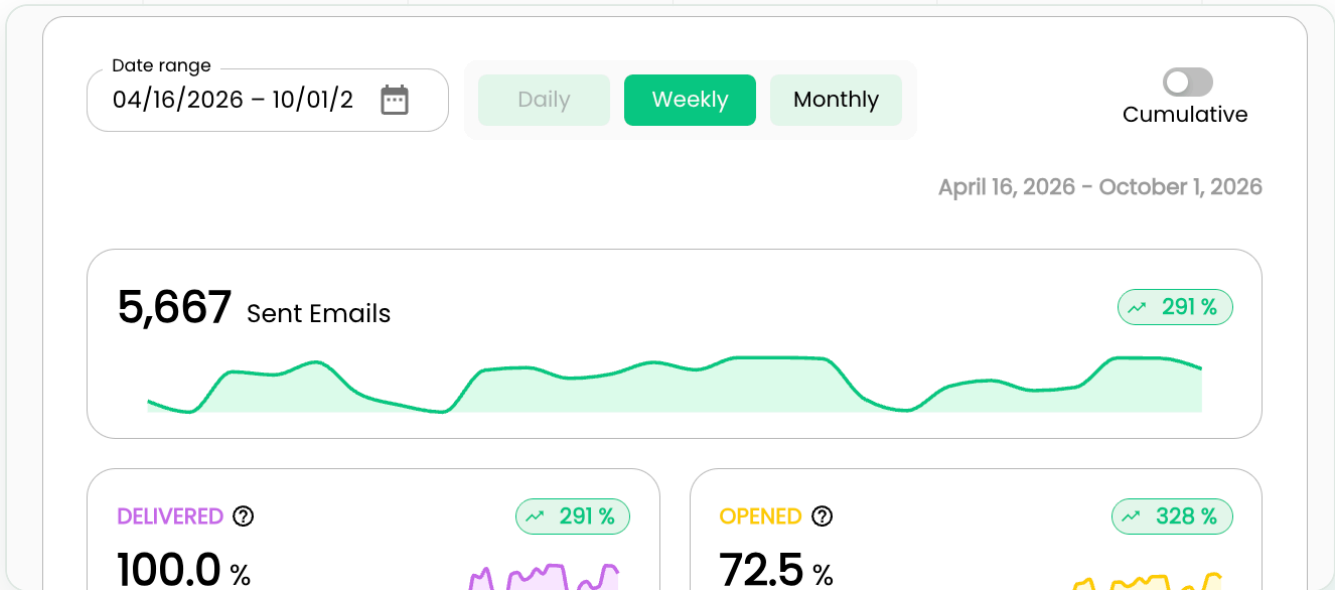
FEE WAIVED

\$2,500

Onboarding and management. You pay only for data and credits.

WHAT'S INCLUDED

- **Buyer profiles** built with your sales team
- **Database unlocked:** cleaned, verified, refreshed and segmented
- **Sending infrastructure:** secondary domains and warm-up
- **Campaigns launched** in English and French, by audience
- **Replies routed** to your team, with a weekly engaged list
- **Dedicated support for the entire subscription term** to make the channel work



THREE WAYS TO RUN IT

Hire, outsource, or run it with Ubico.

All three can work. The difference is how fast you start, how much you manage, and what happens when someone leaves.

	HIRE AN SDR	AGENCY	UBICO
Time to first campaign	After recruiting and ramp-up	After scoping	About 3–4 weeks
Scope	Whatever one person can cover	Defined scope of work	All five actions in this playbook
Database work	Usually manual	Often out of scope	Cleaned, refreshed and segmented
French for Quebec	Depends on the hire	Depends on the agency	Included
Who you manage	A new employee	An account manager	A dedicated team
Cost	Salary, plus separate data and email tools	Monthly retainer	Subscription for data and credits. Setup fee waived.

PROOF

Equipment manufacturers using Ubico are having regular conversations with the market, especially in their focus verticals, as more Canadian buyers choose to buy Canadian.

FOOD & BEVERAGE

Processors adding lines and expanding capacity, and open to suppliers closer to home.

CONSTRUCTION

Contractors and suppliers rethinking where equipment and materials come from.

INDUSTRIAL AUTOMATION

Plants investing in automation and favouring partners who can install and service locally.

\$500M+

pipeline generated for customers

400+

sales teams trust Ubico

10M+

AI-assisted emails delivered

WEEKLY SCORECARD

How to know it's working.

Track a few numbers every week. Ignore vanity metrics. The goal is conversations that turn into quotes.

ACTIVITY

- New verified contacts added
- Emails sent per campaign
- Bounce rate (under 2%)

ENGAGEMENT

- Reply rate by campaign
- Positive replies
- Target accounts visiting your site

PIPELINE

- Meetings booked
- Quotes issued
- Pipeline value by market

AT DAY 90 YOU SHOULD HAVE

- A buyer profile validated by real replies
- A clean, segmented database that keeps paying off
- Account lists in at least two new markets
- Campaigns you know work, in English and French
- A weekly handoff rhythm your reps trust
- A clear view of which market to push next

SOURCES

Statistics Canada, Canadian international merchandise trade, October 2025 (US share of exports); reported by CBC News.
Bank of Canada, Monetary Policy Report, January 2026.
Government of Canada, CanExport SMEs applicant's guide 2026–27, trade commissioner.gc.ca.
Government of Canada, Canada's Anti-Spam Legislation (CASL), fightspam.gc.ca.
Platform figures from Ubico. Individual results vary.

This playbook is general guidance, not legal or funding advice. Confirm CASL obligations and program eligibility for your situation.

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REVENUE INTELLIGENCE FOR CANADIAN MANUFACTURERS

Build one more door. Start this week.

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