

The Evenbound Growth Methodology

The guide to creating, building and operating a Growth Strategy for B2B companies with big growth goals.



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Introduction

Are you ready to grow?

Growing a business is hard. This is evidenced by the known fact that more than 50% of new businesses fail within 5 years. If you have made it past that milestone, then you're likely doing some things right. But, you're likely doing some things wrong as well.

The reality is that most struggling businesses actually fail because they don't understand, or value, marketing. They don't know how to create market demand and secure new customers. Companies who master their marketing will out-compete everyone else. They will hold a commanding position and dominate their market. Which are you? How would you grade your performance? Here are four points to grade yourself on that will help you evaluate your marketing:

High level evaluation

1. Rate your brand

You have a very clear understanding of who you are, what makes you different/unique, and how your customers think about you. You are clearly known in your market.

___ out of 10

2. Rate your marketing

You know your ideal customers and where they hang out. You spend the budget with clear expectations of at least a 3x ROI. You produce content and campaigns that result in clear value to your customers and business.

___ out of 10

3. Rate your website

Your website is the most valuable marketing asset of your business. It generates leads on a regular basis and it's the most helpful resource your customers have. It's inviting and engaging and is essential to your business.

___ out of 10

4. Rate you CRM

You know all of the systems, processes and data related to customer acquisition. You can review meaningful reports on a regular basis. Your CRM technology provides clarity and insights that are invaluable to your business and it supports your growth.

___ out of 10

How did you do?

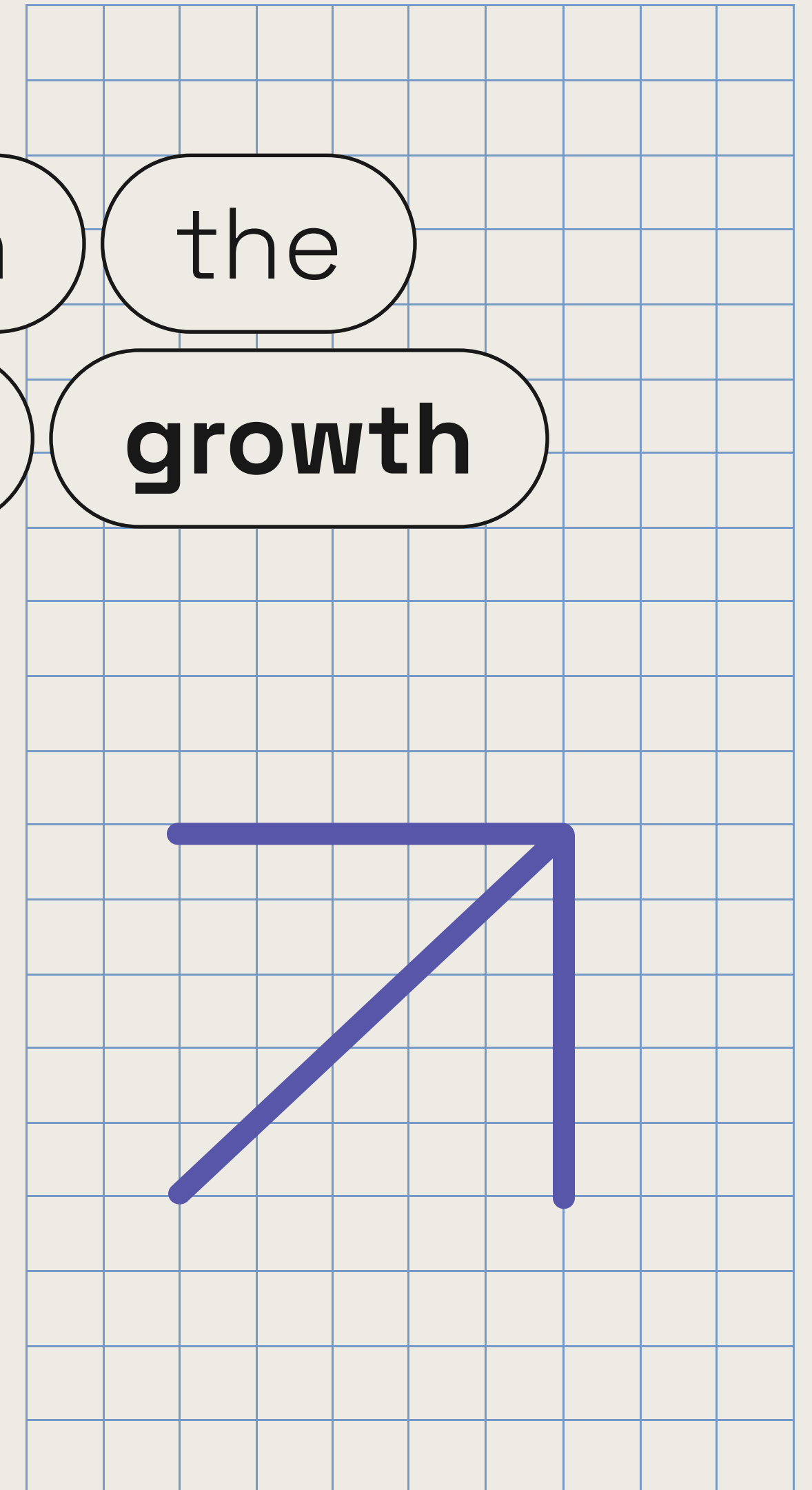
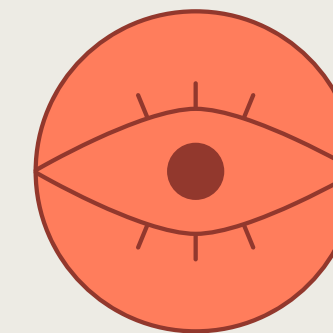
Probably not as well as you would have liked. That's ok. The good news is that creating, building and operating a successful growth strategy isn't that hard.

The reality of today is the majority of businesses don't have a real strategy. They're doing things across a range of roles that all adds up into a giant operational expense.

So, if you're lost, don't feel bad. You're in the right place. The threshold for improvement is low, but the opportunity is immense.

This document provides you with the blueprint to build and operate your revenue growth engine using the Evenbound Methodology.

Let's walk through the roadmap for your growth journey together



The Flywheel

A customer-first approach to growth

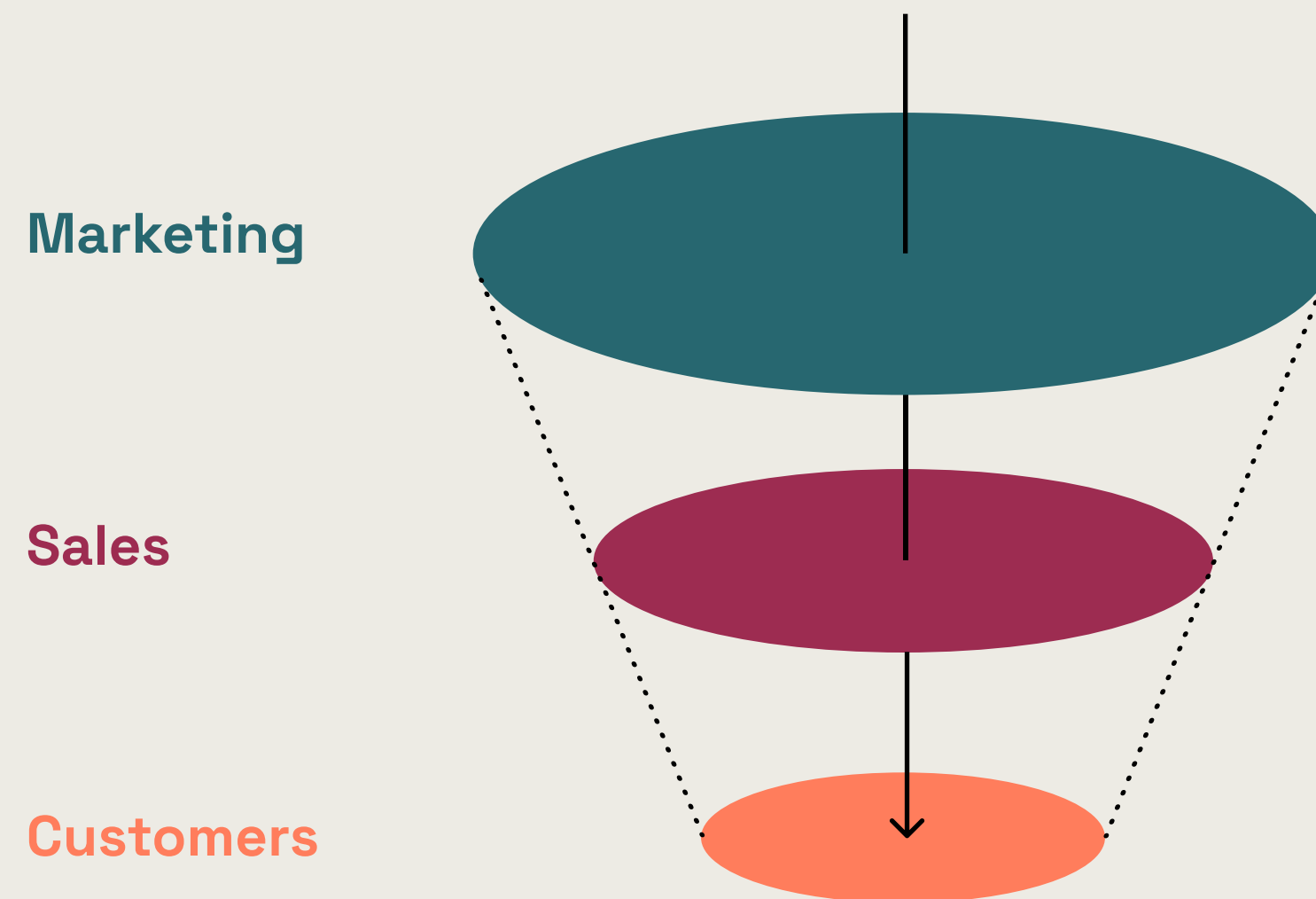
Traditionally, many businesses adopted a customer acquisition funnel as part of a buyer journey. Marketing drives sales and sales drives customers which drives revenue. Logically and statistically, it makes sense. The issue with this approach is that the customer is influenced by sales and not by marketing.

When we place the customer in the center it produces a notable compounding effect. Everything that marketing, sales and service teams do should be with the customer in mind. We write content, define sales processes, and perform customer success activities that all put the customer first. The customer experience creates demand expansion and promotes word of mouth which fuels growth.

Then

Funnel

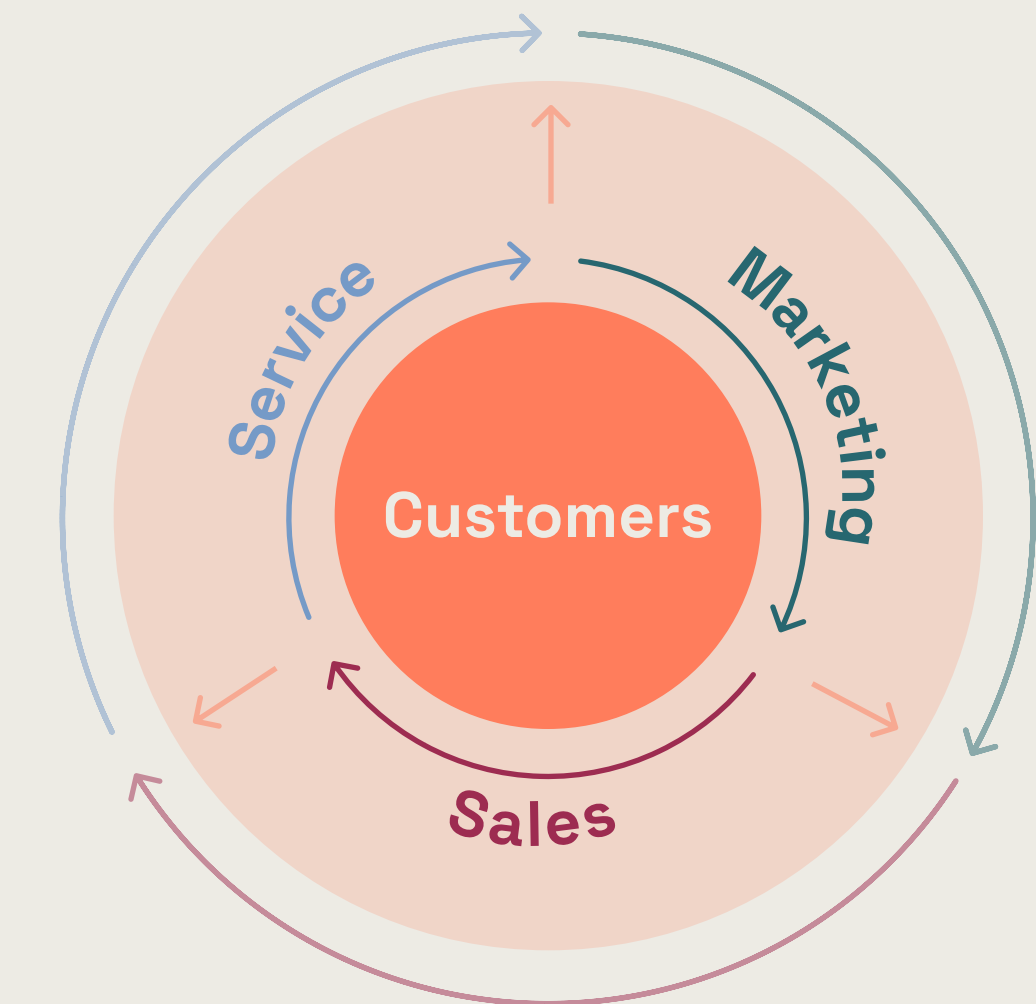
Customer as an afterthought



Now

Flywheel

Customers at the center

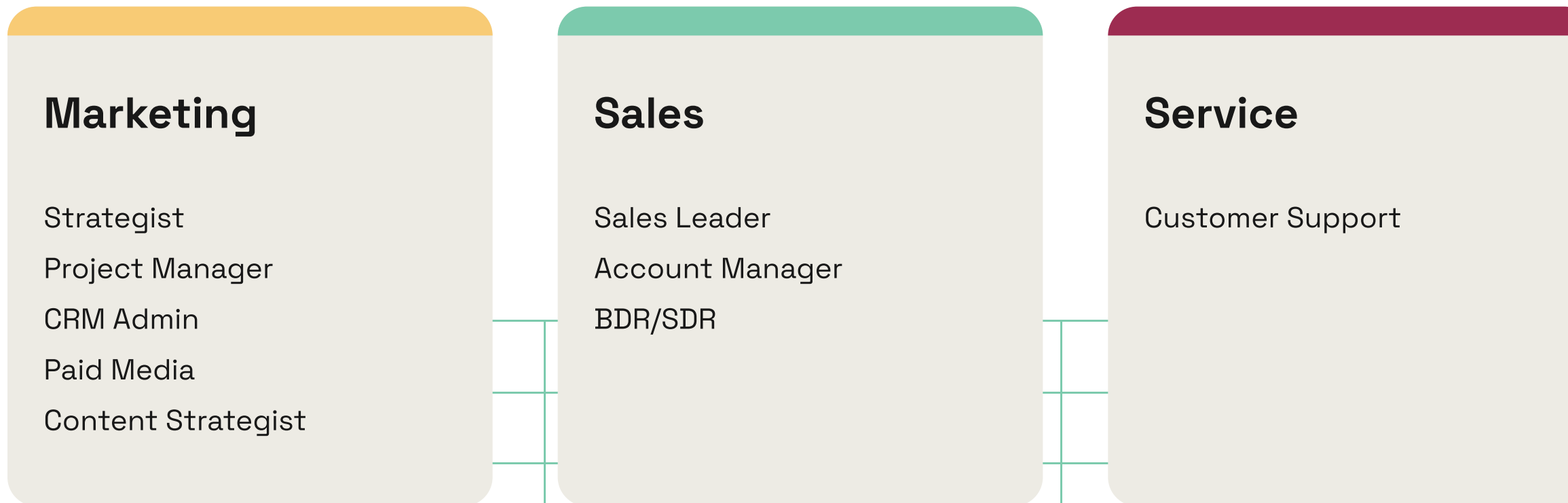


It takes teamwork. Meet your Growth Team.

In order to grow a business, you need to understand people. You need to assemble the right team to do the right work in the right ways. Without these essential roles, you are lost. All the planning in the world will not do anything without a team to bring it to life.

This is quite literally the Evenbound value proposition. We fill the required gaps that are needed for growth. If you're going it alone, you will need to find the right people to execute.

Here is a starting roster for roles you should consider:



Of course, you could hire these internally, hire a fractional/contracted resource, or hire an agency. Or, it could be a combination. That's up to you to decide. What will matter more than anything is your team alignment and understanding of the following questions: What are we doing? Why are we doing it? What is my role?

The Importance of Change Management

In our experience of working in various capacities across all of these roles, it is important to understand change management and plan for it. Writing or rewriting a GTM from scratch involves immense change at every level of the organization to be successful.

There are two personas that we have found to be invaluable in the change management process. They are the Executive Sponsor and the Enablement Champion.

The Executive Sponsor is the highest person in the organization who signs off on the idea and strategy. They provide the money and the leadership.

The Enablement Champion is the person who owns the production and administration. They provide the practical support needed to get things done. These roles can be cross-functional, but they need to be identified as early as possible.



A few words about Artificial Intelligence

Since Chat GPT launched in 2022, artificial intelligence (AI) has created a massive shift in how companies perceive what's possible.

Suddenly, the production of business assets like marketing materials became enabled at unprecedented levels. If we don't use AI to support and enable portions of our strategy, we are simply not recognizing the full potential of what's possible.

We encourage clients to keep an open mind when it comes to AI and consider what's best for their specific use cases. It's highly likely that we will be using some AI for content brainstorming, CRM Automations, and more if we work together to build and operate your growth strategy.

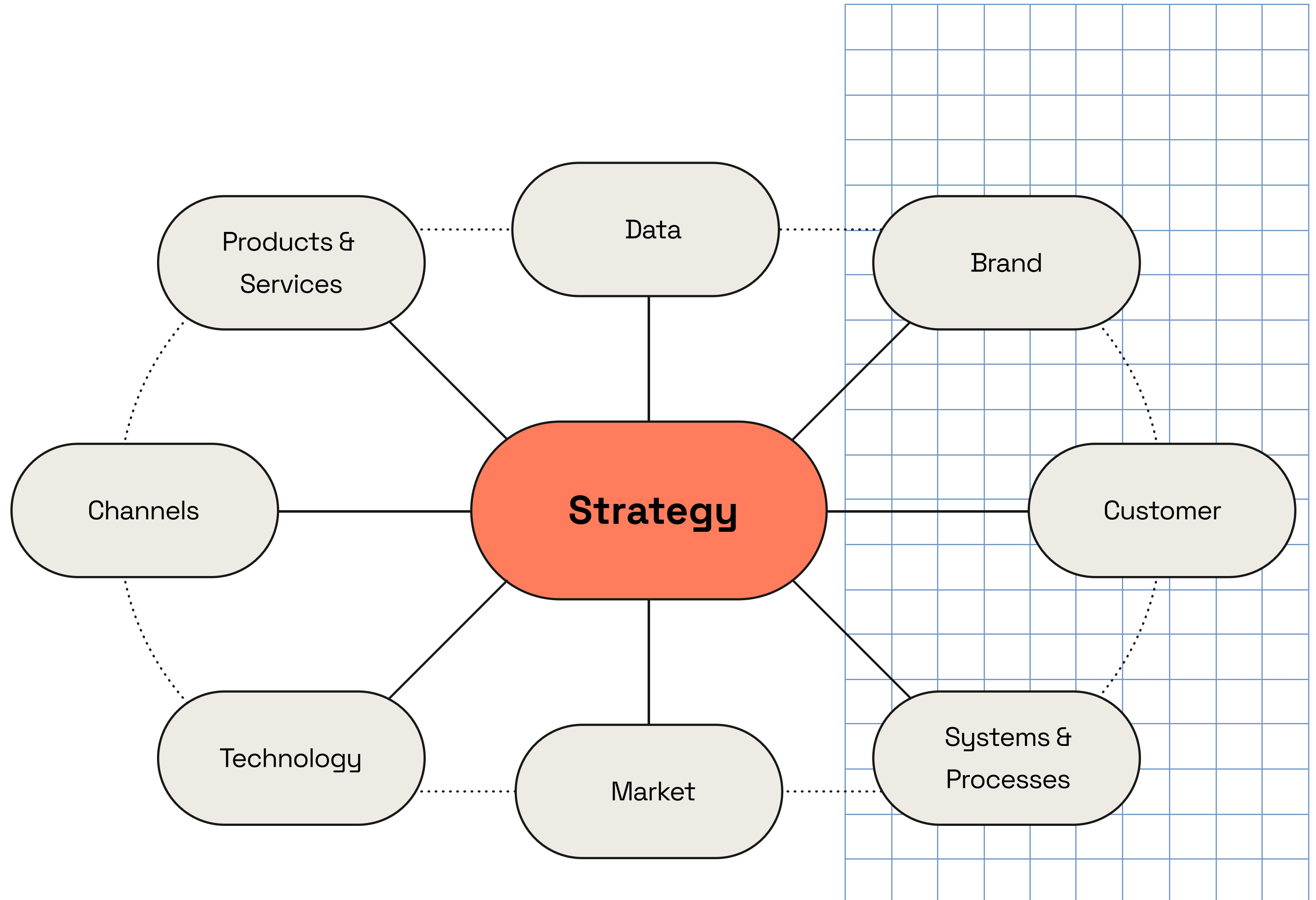
The Framework

Our Proven Growth Strategy Model

By the end of this process, you'll have a clear understanding of growth strategy and how we create and build strategy for our client engagements.

It's important to see the strategic component as the central part of the larger framework. This will orient you to how we build growth operations in stages and work toward an operational milestone.

You might ask, "Are all the components necessary?" "What if we're not very strong on brand?" It's important to aim for what we call "market-ready." Is it strong enough to go to market now and improve along the way? Perfection eludes all of us and should not be the goal.

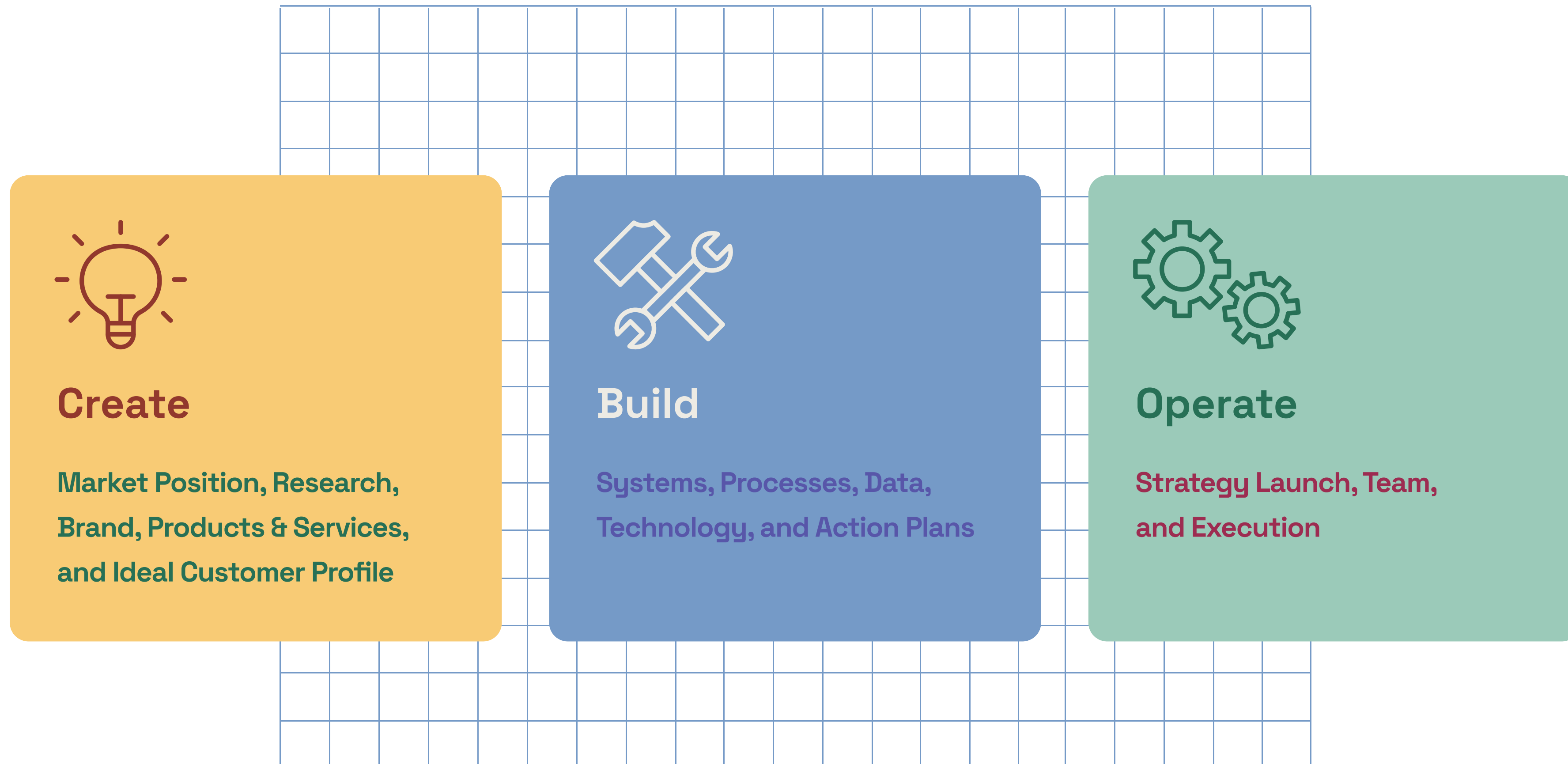


Your Revenue Engine

Building the Ship in 3 Phases

The process of creating anything meaningful takes time and thought. Your GTM strategy and growth plan is no exception. If we follow the framework and the process, we should be able to create, build, and operate your revenue engine in a matter of weeks.

Remember, we are shooting for “market-ready” here. We need to resist the urge to analyze and iterate as it can consume precious time that should be spent generating market demand.



Create Phase

Market Position, Research, Brand, Products & Services, and Ideal Customer Profile

During the Create Phase, we are going to (yes, you guessed it) create some core essentials to your strategy. It's important to keep in mind that you likely have some of these elements from previous work that you've done. That's great. We can reuse or retool them to fit our needs.

A large part of our work in the Create Phase is centered on answering core questions like "Who are you?" and "Who do you help?" and "How do you help?"

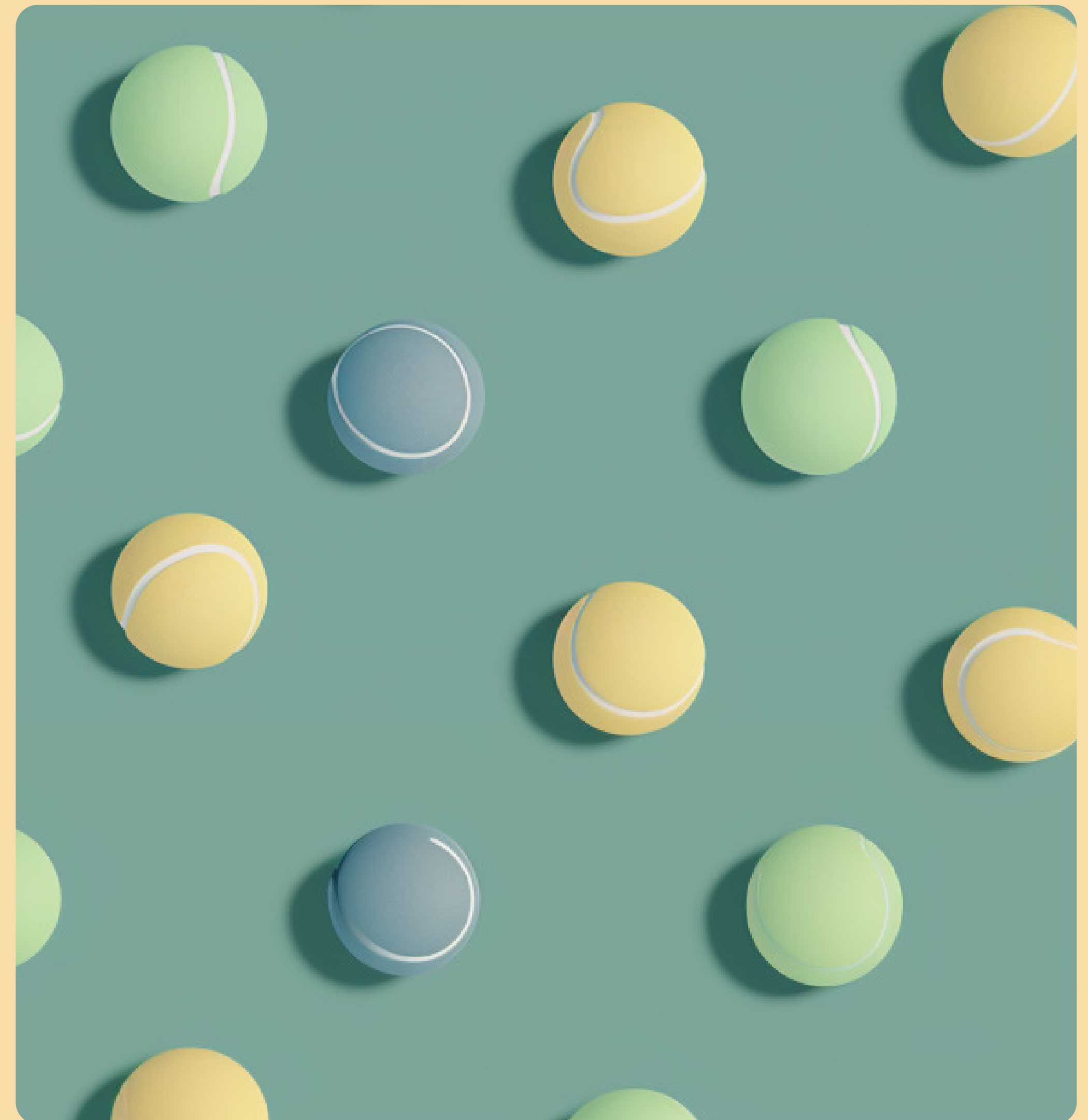
Goals & Objectives

First, we need to get aligned on our collective "Why?" The answer to this question is oftentimes best framed in a goal or objective. Goals are specific, measurable, attainable, relevant, and time bound. Objectives are more broadly defined. Here is an example of each:

Goal: Increase Sales Qualified Leads by 30% over the next 90 days.

Objective: Expand our brands reach into adjacent markets with advertising.

When you create goals and objectives, be thoughtful about how you phrase both and try to limit it to only 3 to 5 in total. These will set your north star across the entire GTM strategy and action plan.



Brand Foundation

Nothing is more misrepresented in business than the idea of “branding.” The term actually originated from marking livestock to determine who owns them. In recent years, visual designers adopted the term and put it on everything in an attempt to manufacture value.

There are some very good modern frameworks for establishing your brand. This is an important step because everything that comes after this point needs to be cohesive and consistent.

The consistency is what creates clarity and the clarity is what you need to make a real impact.

Consider these elements when creating your brand:

logo

name

5 brand pillars

mission/purpose

voice/tone

product/service

messaging

colors

typography

imagery

If you can pull all of this together and it's clear, powerful and unique, you're well on your way to having a solid brand.



Web Strategy

Your website is the most valuable asset within your entire marketing program. It's also the most commonly overlooked. Many companies fall into the habit of redesigning their website every 3 to 5 years for no apparent reason other than to change how it looks. This isn't strategic.

You will benefit your growth plans much faster to simply make strategic changes to your current website in order to affect the performance metrics.

What changes can we make to drive more traffic, page views, engagement, and conversions? These strategic changes can likely be made to an existing website in a shorter period of time than a complete redesign which supports a "move quickly" approach.

There are circumstances that warrant a complete website overhaul, but those are at the expense of the time-to-results metric that we're accountable for. Running a complete diagnostic audit of your website is the biggest factor that determines this directional decision.



Define Market, Position & Opportunities

The aspect of marketing that the average person rarely understands is positioning. It is also the single most important consideration of your marketing strategy.

Getting clear on what market category you operate within and how much of that market category you command will offer clarity on how much opportunity you have.

Ironically, too much opportunity can command so much investment that efforts are futile. Alternatively, too small and there simply isn't enough to make it worthwhile.

Here is an example for an IT Cloud Security Firm:

Software Consulting
Industry

IT Consulting, Cloud Security
Category

\$40 Billion
Size

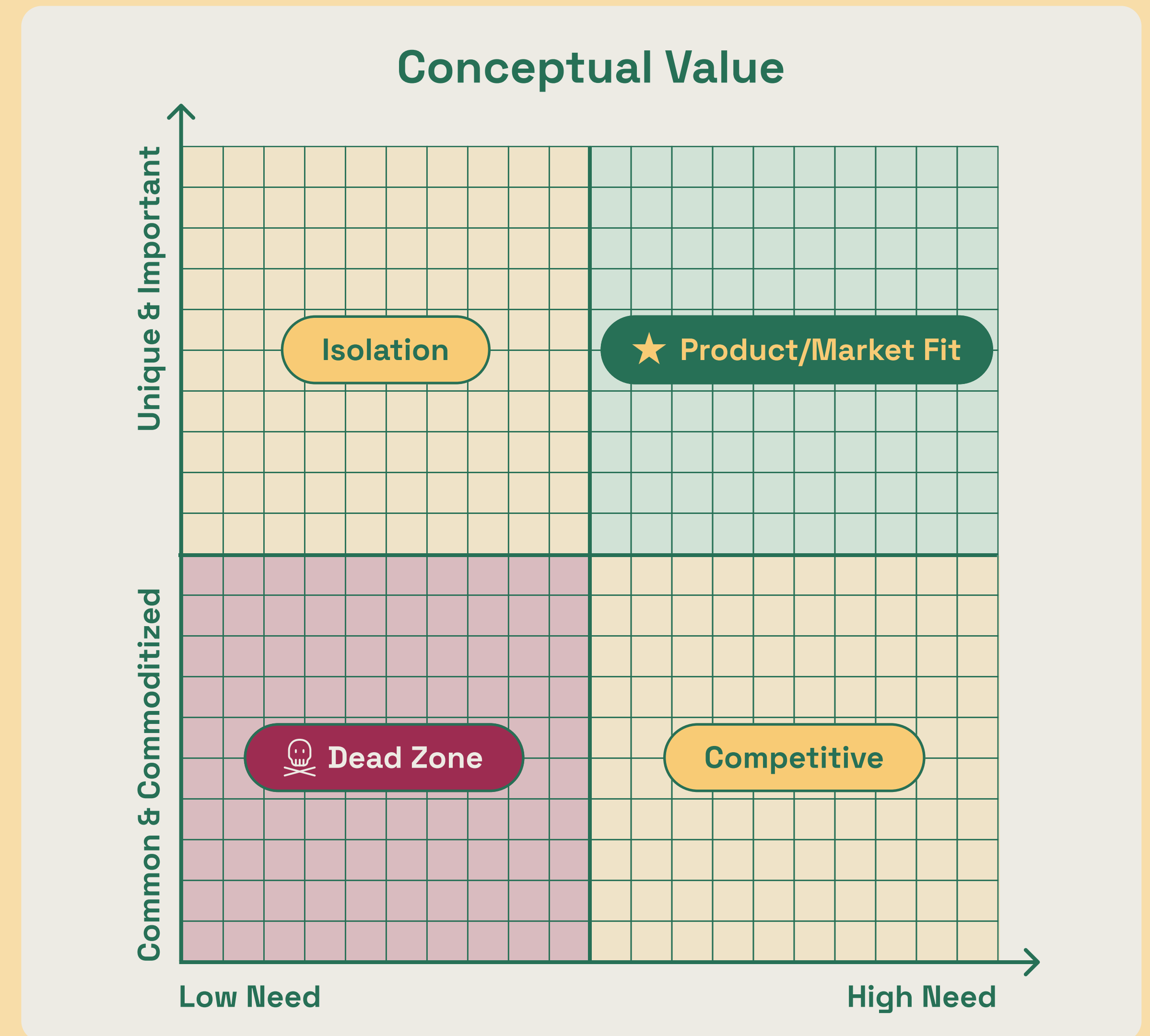
< 1% of market share
Position

Top 3% of the Enterprise market. Ignore bottom 97% of market.
Market Opportunity

Product/Service Market Fit

Some business owners and leaders may find it difficult to objectively consider the actual value of their product or service. It's their baby or creation. Of course they think it's awesome. Stopping to consider the market value of your solution is an important step.

One way to think about this is through the value framework outlined below. Ask yourself, "Is my solution truly unique? Or common?" Then ask yourself, "Is the need for my solution high? Or is it low?" These guiding questions will help you determine if you have product/service-market fit.



Ideal Customer Profiles

Everyone knows that a delighted customer is the most powerful asset of any business. There are numerous quotes from business master celebrities preaching to the power of knowing the customer. Getting to know your customers, or who you want as customers, is a critical step in your GTM strategy.

There are three categories of information that comprise the Evenbound Ideal Client Profile. They are as follows:



Firmographics

Industry, size, location, budget, & performance



Technographics

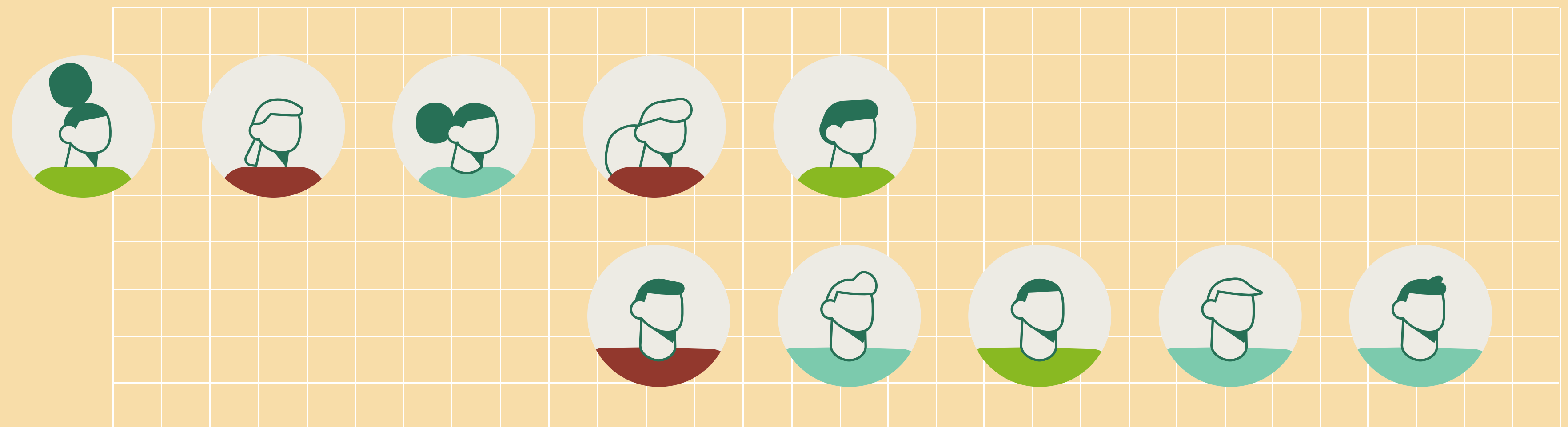
CRM, MAP, data, & governance



Psychographics

Personality, interests, values, attitudes, & behavior

We can't be all things to all people, so it's important to limit how many target ICPs you hold. It's also important to consider how multiple ICPs may be involved in your buying process. Do you need to target a VP of Sales along with a CFO? Many times in B2B, the buying process is long and complex. Be mindful of who is involved and how you consider them in your strategy.



Build Phase

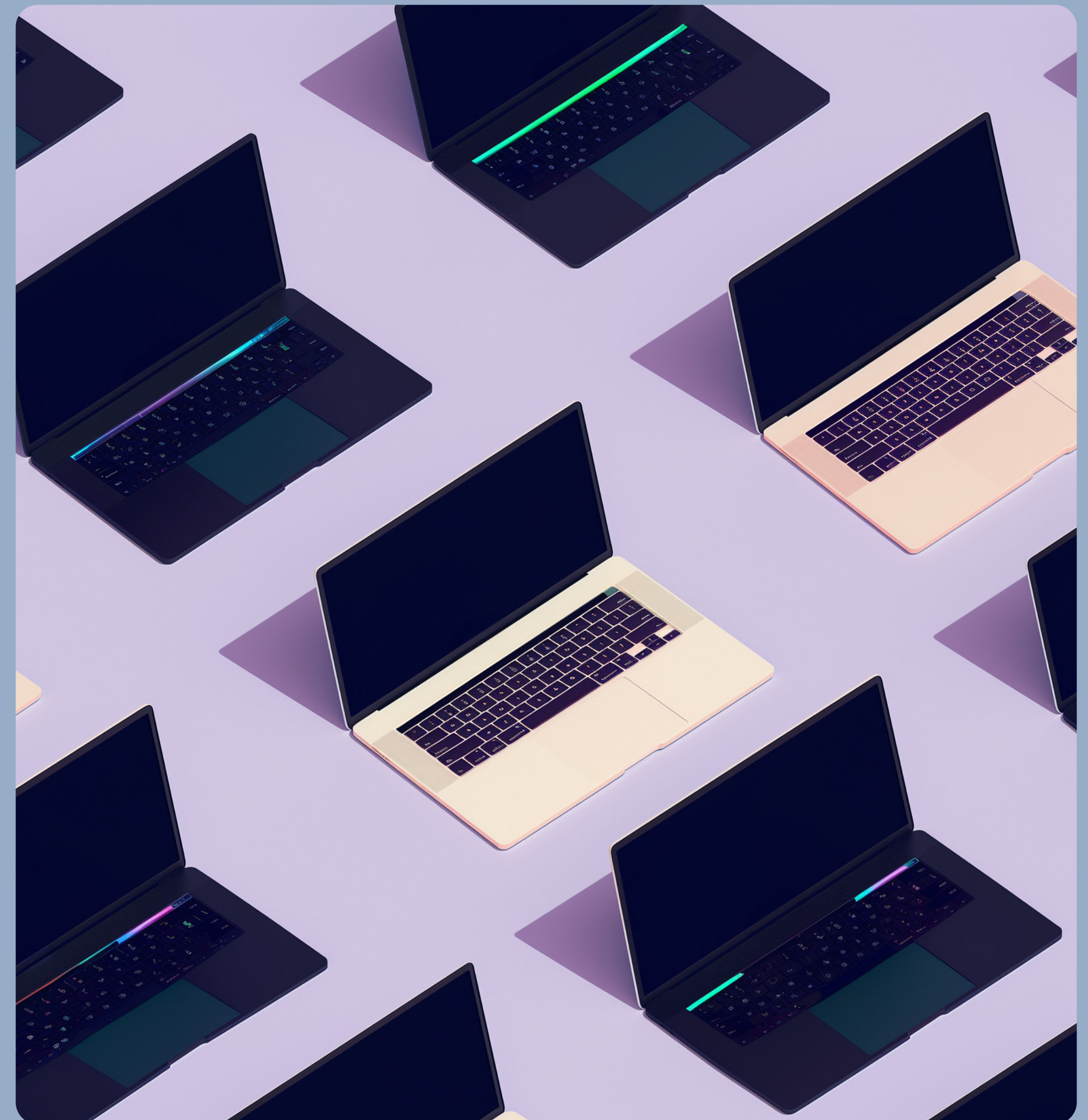
Systems, Processes, Data, Technology, and Action Plans

Building a structure starts with a foundation, then a frame and finally, the detailed work begins. Without the foundation and frame, nothing else within or upon the structure matters. The framework for your GTM Strategy consists of systems, processes, data, technology and plans.

Sales Plan

The process by which you do anything will greatly determine how it performs. If everyone does things in the same way, you can clearly and easily identify how to improve its performance. The opposite is also true. If everyone does things differently, it creates chaos and confusion.

Your documented sales plan as part of your GTM should be a simple document that outlines the key steps in your process with related elements like goals, activities, etc. You need to give everyone in sales clear expectations and boundaries.



Sales Plan

Awareness

Prospect is experiencing and expressing symptoms of a problem or opportunity.

Is doing educational research to more clearly understand, frame, and give a name to their problem.

Consideration

Prospect has now clearly defined and given a name to their problem or opportunity.

Is committed to researching and understanding all of the available approaches and/or methods to solving the defined problem or opportunity.

Decision

Prospect has now decided on their solution strategy, method, or approach.

Is compiling a long list of all available vendors and products in their given solution strategy. Is researching to whittle the long list down to a short list and ultimately make a final purchase decision.

Sales Methodology

Lifecycle

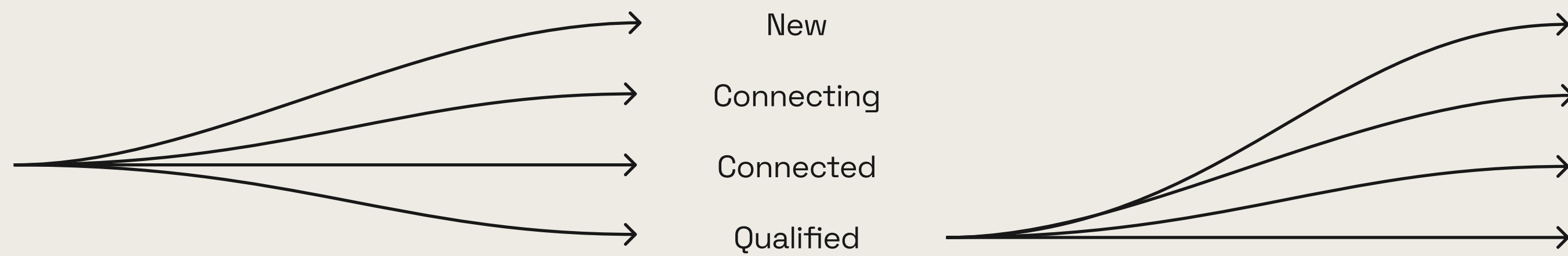
- New
- MQL
- SQL
- Opportunity
- Customer

Lead

- New
- Connecting
- Connected
- Qualified

Deal

- Discovery
- Negotiation
- Proposal
- Closed Won



CRM Technology

Your CRM, and the sales pipeline within it, is the “Grand Central Station” of your revenue operation. The train locations, arrivals, departures, and passengers all flow through your pipeline.

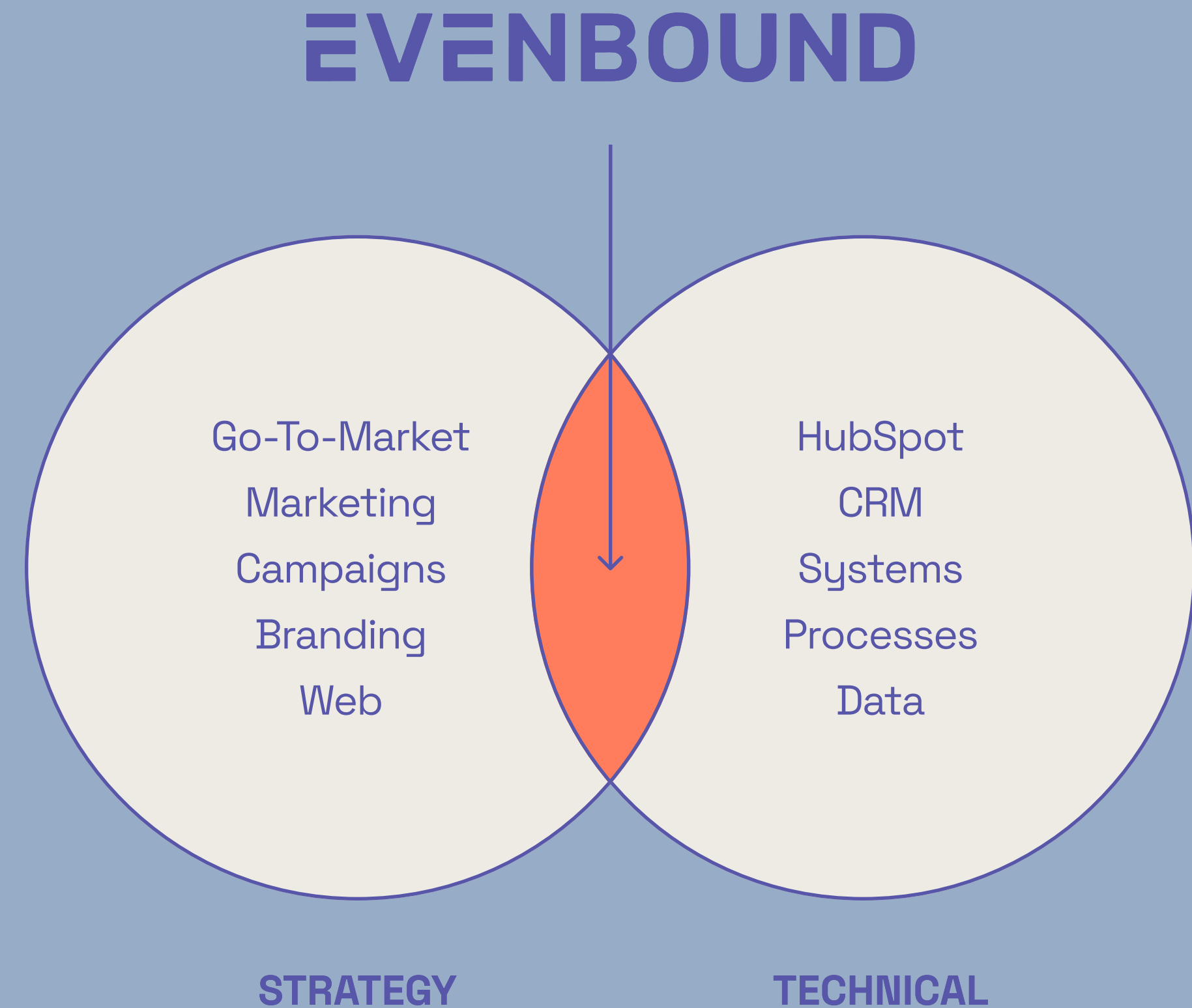
The stages of your pipeline are a reflection of your buyer journey. Each stage has a set of qualifying and exit criteria. Ideally, you are automating various actions within the CRM to enable your sales team to focus on what matters most, the customer. That means less wasted time on administrative CRM tasks.

We have performed hundreds of CRM implementations. These projects involve many people, opinions, motives, and personalities. It’s for this reason that they often become complex and messy.

The three elements that ensure successful CRM adoption are leadership, governance, and enablement.

No CRM tool provides the perfect solution, but there is one that is the clear leader for the mid-market companies we frequently work with. It’s called HubSpot. HubSpot provides a CRM platform with tools to enable every part of your GTM. Marketing, sales, service, web and management all have something to gain through HubSpot. We view it as the vehicle for your growth journey.

But, the proper technical expertise is essential for successful setup and configuration. Don’t go it alone on your CRM. Get expert help from a group who understands the strategy and the technology. This will not only enable your systems and processes, but it will give them purpose. The intersection of strategy and technology is where your GTM magic happens.



Customer & Buyer Journey

We worked on who your customer is and defined those profile criteria. Once we have a clear understanding of your ICPs, we need to map out two things: (1) How they become a customer; and (2) What they experience after they purchase.

Let's take the customer journey first. The key to this exercise is your ability to empathize with your customers; to understand their needs and their considerations. Start at the beginning and determine what would be ideal milestones for them throughout the funnel — from awareness to consideration to decision.

How do they process information and make decisions? How do they research? Take them all into account and write it all down. Then map it out with your marketing and sales teams. This single exercise will deeply benefit and inform your GTM strategy.

Next, we consider what happens after your ICP purchases from you. This is called the customer journey. How does your sales team hand off to delivery? How quickly do they see value?

Your service team will be deeply involved in this exercise. It will inform your service team's KPIs and metrics. Write it all down in sequential order and align your team and your technology around it.



“

In 20+ years of working in marketing and strategy, I can count on one hand the amount of times I've seen a true strategy document. Lack of strategy is a very common business issue today. It's difficult to admit that you haven't put sufficient thought into something.

— John Heritage, CEO Evenbound

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Marketing Plan

The front of your growth strategy is, and always will be, directly related to market demand. If you recall, we evaluated your market, positioning, and opportunity in the Create Phase of this process.

Now, we dig deep into that information to define how much of that market demand we will capture. This is the purpose of your marketing plan.

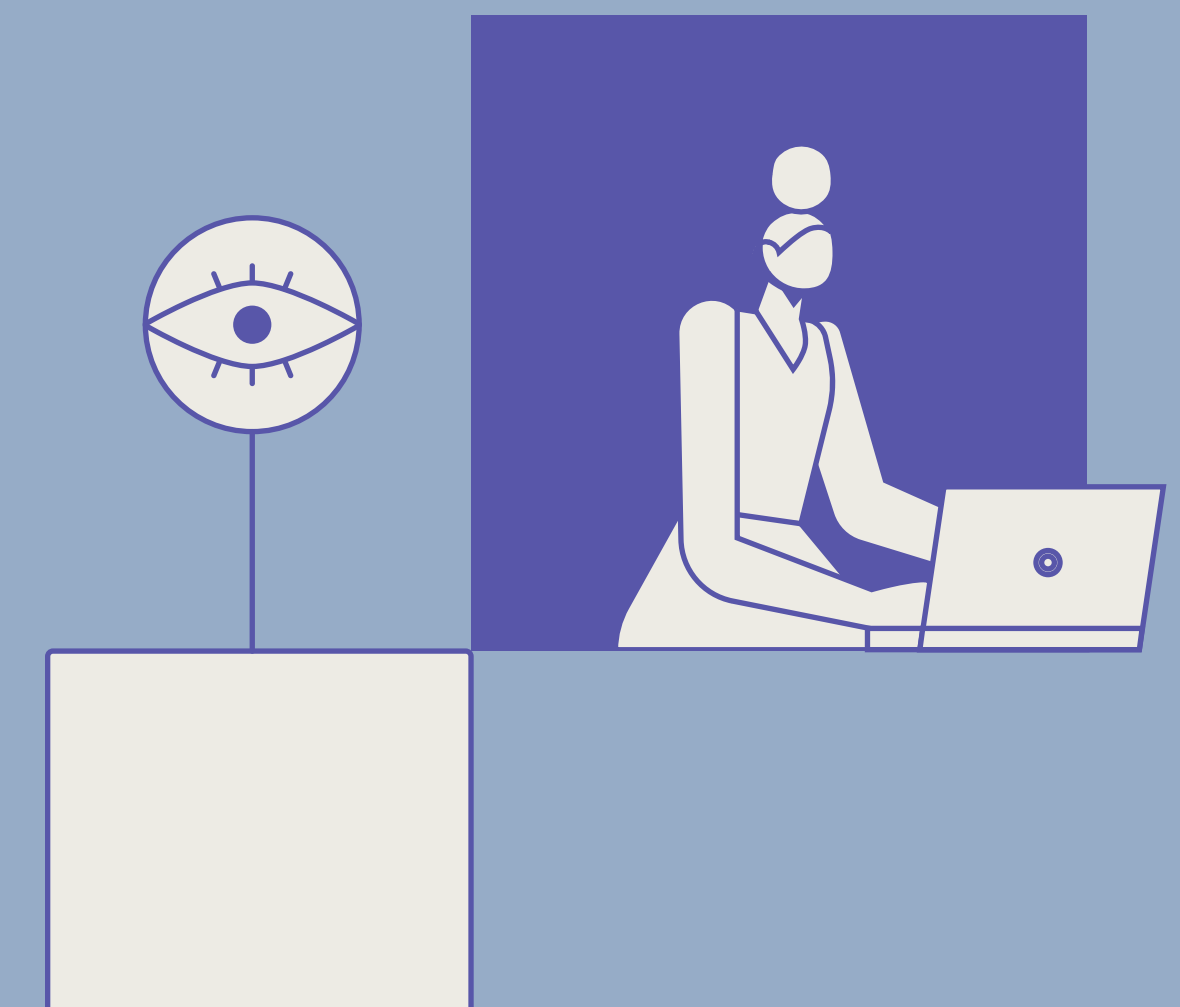
The reason most companies, especially small business and mid-market companies, fail at marketing is because they fail to plan. It's not easy! There are so many distractions for marketers today that it's hard to stay focused and execute for any duration of time. So, what's the key to our success? We need to do a few things really, really well rather than doing everything at once and failing at all of it.

The first step in our plan is to define which channels we want to own. When it comes to marketing channels, the fewer the better. B2B companies that have long sales cycles and noisy, competitive markets tend to do well with five primary channels:

Inbound Marketing - In 2024, everyone should know what inbound marketing is and why it's beneficial. Inbound marketing is designed to influence internet search. At the heart of Inbound is the production and distribution of valuable content. What makes inbound successful is a deep understanding of your ICP and their journey. Everything in this document is related to, or for the benefit of, inbound marketing. The key elements for a functional inbound marketing channel are: ICP, keyword research, buyer journey, content calendar, CRM/MAP, and website. Since we're writing and positioning content, you will need a heavy SEO effort as well.

Outbound Marketing - This is perhaps the most widely misunderstood marketing channel in existence today. Tactically, we are talking about programmatic 1:1 email, messaging or even calling. People who don't understand it often refer to it as spam. The difference between Outbound and spam is the strategy and execution behind it. Outbound marketing targets the right person at the right time with the right message in order to initiate a sales conversation. If executed correctly, it works extremely well. If executed poorly, it can create a big mess. Therefore it requires a high level of knowledge, discipline and caution.

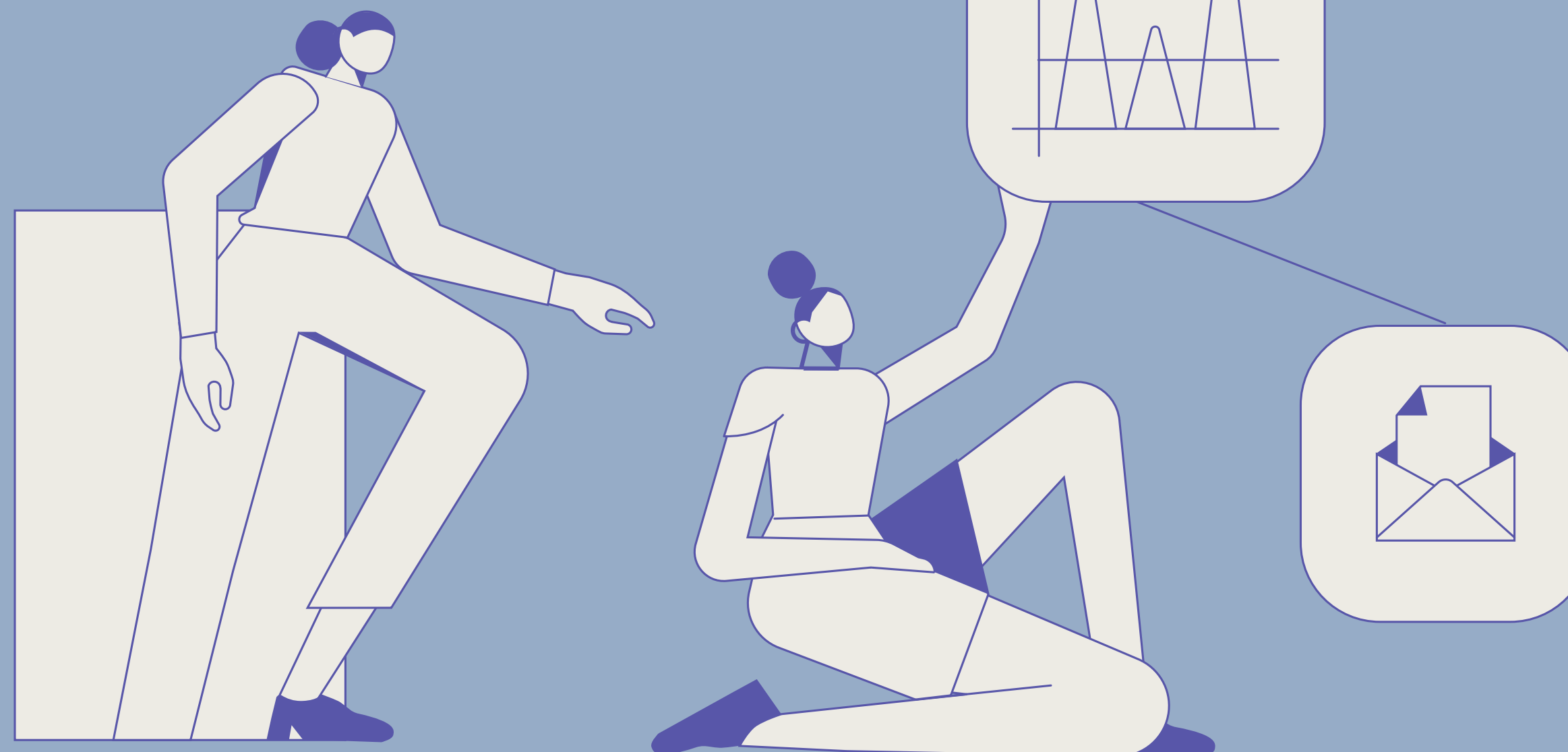
Dark Social - This relatively new term is used to describe all of the obscure ways in which customers become aware of you, but don't provide direct attribution in reporting. Some examples are LinkedIn, podcasts, Slack groups, etc. It's important to focus on activity and production in these channels in order to create and capture demand where it's happening.



Paid Advertising - Online advertising can represent a black hole for your marketing plan. Billions of dollars are wasted on Google, Bing and LinkedIn ads every year — and the providers encourage it to the benefit of their bottom line. Our approach to online advertising is unique in that we’re focused solely on ad channel conversion metrics and benefit-focused outcomes. How much does it cost for a conversion? And how much does that conversion bring in revenue? The clarity of our ICP work gives us the ability to target a small audience for high-value conversions rather than volume.

We also utilize our work in branding to ensure that we are messaging in the right way to our target audience. When our paid campaigns have the right audience, creative, messaging, and goals, they are ready to launch. The final piece of this channel is ensuring all of the data flows into our CRM to the benefit of long-term performance reporting.

Referrals - There is so much that contributes to a successful referral strategy and it’s very unique to specific businesses. However, we have to measure it because what gets measured can be improved. So, it falls under the marketing plan. The best way to encourage referrals is to tell compelling customer stories. These can be in the form of reviews or case studies. They can be in print or video. The stories should come from marketing, not sales. The most important consideration of customer stories is that they have to be produced on a regular basis.



Final Thoughts on Your Marketing Plan & Channel Strategy

Your channels may be quite different than what we have listed here. That’s ok. Each organization is different and your channels will largely be determined by your customers and ICP, rather than your organizational leaders.

Putting marketing all together in the form of a plan isn’t as hard as it sounds. It may help to think about marketing in terms of assignments, actions, and outcomes. Who is doing the work, what are the actions being taken, and what are the expected outcomes.

Lastly, make this a living document built for continuous improvement. It should be reviewed, improved and updated every quarter.

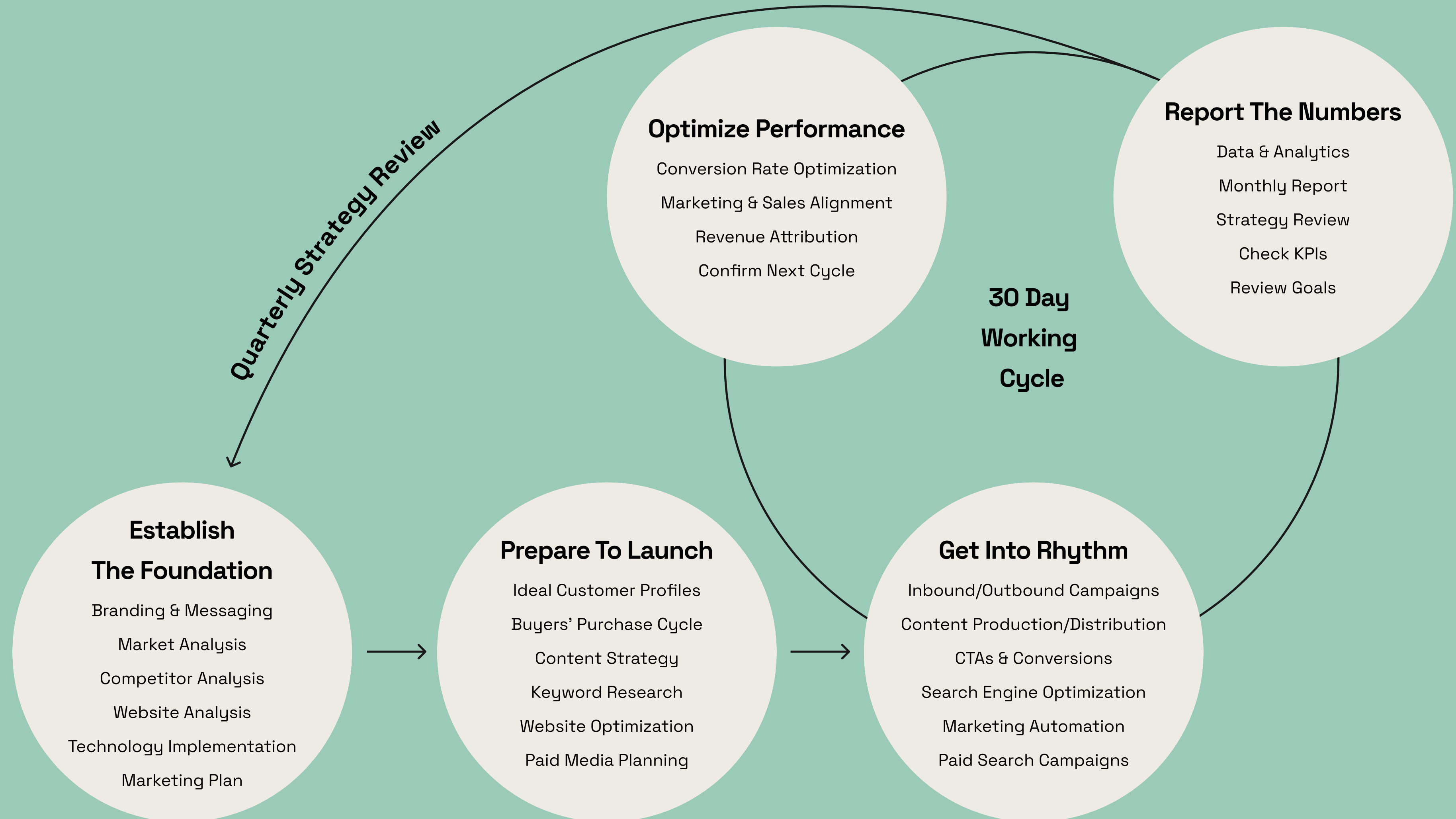
Operate Phase

Strategy Launch, Team, and Execution

Congratulations! At this milestone, you've likely given more thought to your growth strategy than 99% of businesses. Perhaps you've already completed much of what we covered in the Create and Build phases. That's ideal. However, it's important to consider that the next phase is actually what matters the most: putting the plans into action and operating your growth strategy.

Operational excellence is all about organization and execution. This is largely what determines the success of a growth strategy. We tend to look at the operating model through the lens of a 90-Day Sprint Plan.

Three-month working cycles allow us to accomplish a meaningful amount of work while collecting enough data to measure effectiveness. Here is a visual representation:



Creating a 90-Day Sprint Plan

Most business operations are compartmentalized into quarters. The primary reason for this is because it's easy to accomplish tactical tasks each month. Three months offers enough of a window to set a big-picture goal or strategy and work towards it. These working cycles evolve and change over time, but create a balance of accomplishments both big and small. We work from custom sprint planning documents to align on deliverables, timelines, etc. These sprints are built out in a collaborative Google Sheet that contains clear S.M.A.R.T. goals, action items, due dates, and more.



Channel Strategy & Campaign Launch

Three, two, one... Blast off. We are turning on campaigns and penetrating the awareness of your market. We will need to make some adjustments and some things won't be quite right, but that's ok. Progress is greater than perfection.

Conversations are starting to happen and your sales team sees an improvement in leads. All good signs that our plan is coming together. What's critical as we start executing, is that all of the data flows into our reporting mechanism in the right way.

We should use our CRM to create dashboards and reports that align with how we are tracking to our goals.

Creating alignment between sales and marketing teams early is important. We really want them collaborating and working together. Continuous improvement is an important concept to instill across the teams. Now that we are up and running, being able to recognize patterns that represent opportunities should be our focus.



Report the Numbers

Evaluate all of your systems, processes, and data. Look at your reports against your goal. Talk through them with the team. How is everything performing? Is there anything that needs to change? Or be improved? The evaluation of your 90-Day Sprint Plan is important to long-term success. It's unlikely that you will see wild success in your first 30 days. Patience is key. Remember, you're in this for the long game. Your stated goals should reflect this. Incremental progress gets you to your goal.



Change Management and Momentum

As we operate month in and quarter out, it's important to embrace change in order to maintain momentum. Adopting a growth mindset will enable the team to embrace small failures and feedback for the gifts that they are. Be sure to keep everyone aligned on the three **Ps**:

Purpose: Why are we doing this?

People: What is my role?

Performance: How is it working?

The Quarterly Strategy Evaluation

Every 90 days, we gather to evaluate and score the elements of your strategy. The reason for this is that things change. A business is a living, breathing entity. It's affected by markets, economies, and all matters of outside factors.

This can, and often does, have a bearing on your strategy. So, we evaluate and scope strategy every quarter on a simple 1-10 scale. The strategy review meeting participants are leaders and key stakeholders who can objectively rate the strategic performance.

Brand Strategy
___ out of 10

Marketing Strategy
___ out of 10

Web Strategy
___ out of 10

RevOps Performance
___ out of 10

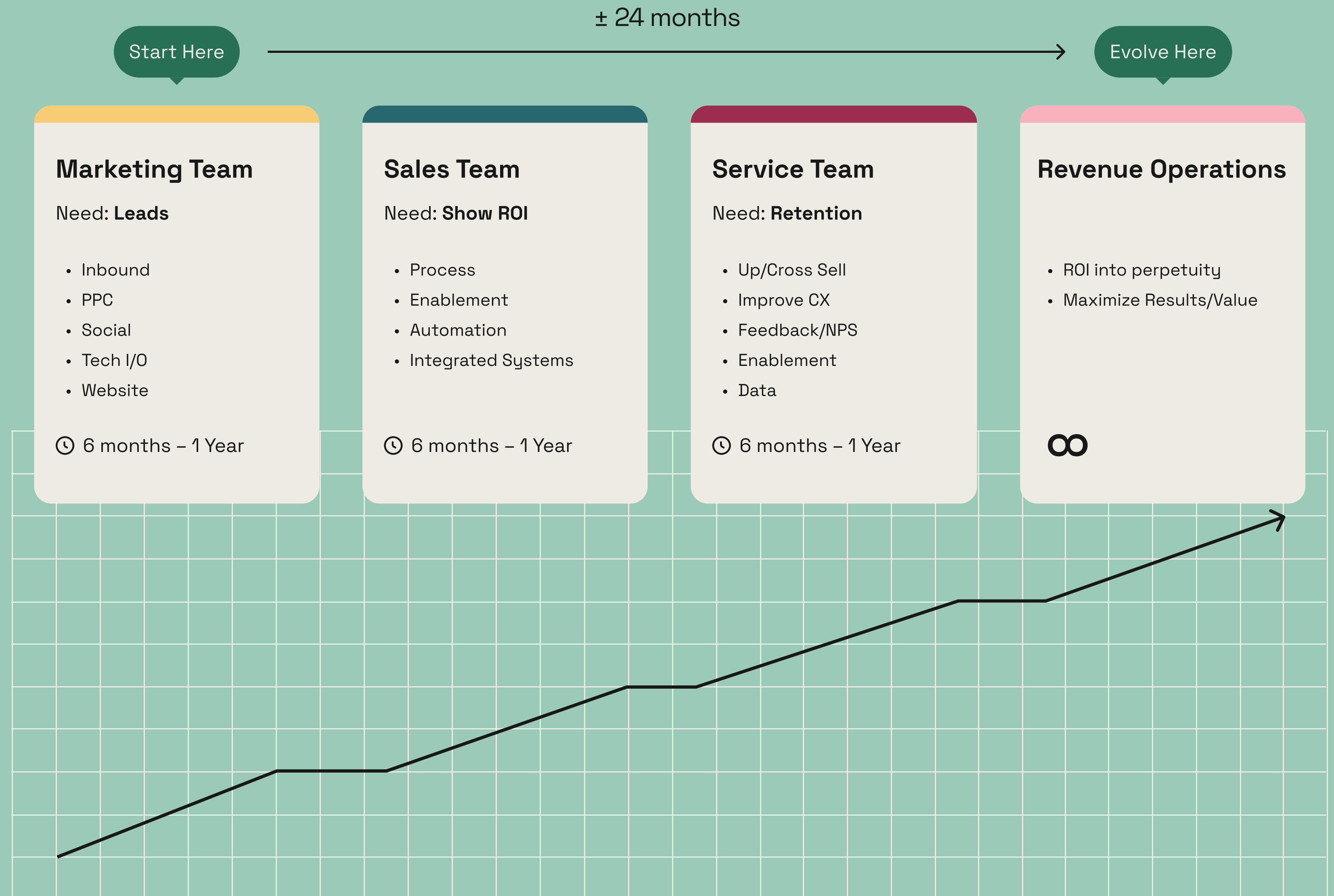
Use scores to determine improvement/process focus.

Stages of Strategic Evolution

We've raised the concept of change management already. As in life, the only constant in GTM work is change. We need to evolve and adapt and grow into new areas of focus. This is actually why clients work with Evenbound, on average, over four or five years.

We continue to identify the next area of focus and prioritize it. What starts as heavy inbound marketing might evolve into demand generation and, eventually, into revenue operations.

This process of evolution takes time and it's important to set expectations. The outcomes are certainly worth the time, energy, and effort.



Realize your full potential by creating, building, and operating your growth strategy

Revenue transformation encompasses everything that links the customer experience together along the buying journey. From your website, content, and data, to lead generation, analytics, and the ongoing customer relationship post-sale — everything is connected. With people, systems, and processes across the revenue team built and operational, it's time to find the efficiencies and scale the organization. Nearly every organization is under significant pressure to produce more results with less resources. They need competent people to fill in gaps, add value, and complete the system.

What if you could address all of these needs and execute a program that evolves over time allowing the organization to sustainably scale and grow? What if you continuously improved, uncovered value, and knew what to do next? What if you had access to true subject matter experts and technical experts, leaders and doers, true partners? Well, we're Evenbound and that's exactly what we do.



About Evenbound

Evenbound has been developing this methodology over the past few years. During that time, we have experienced significant organic growth every year.

It has worked so well for us that we prescribe it to clients who are ready for serious growth by generating awareness, leads, and sales.

Our strategic framework works the best when we operationalize it on top of HubSpot. We exist in the space where strategic consulting and technical consulting intersect.



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