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For almost every company or organization, continued growth isn't just important, it's essential.

Without growth, profitability may decrease. Without growth, employee satisfaction and customer experience could diminish. Without growth, your competitors may overtake you. Without growth, economies of scale are diluted. Without growth, risk will most likely increase. Without growth, building additional equity may become difficult. And without growth, you as an entrepreneur could actually lose your passion about your own organization.

But there are a number of systematic ways to help your business or organization grow through the use of effective marketing and branding strategies and tactics. I've found that the most effective method—by far—is to follow a proven five-step process that I developed through trial and error over the past 30-plus years. And I continue to use and refine it for my clients to this day.

This model has served me well for a wide variety of industries and applications, including large B2C and B2B corporations, small “mom and pop” firms, mid-market companies, educational institutions, industry associations, nonprofit organizations, and even start-ups.

The primary key to success is to focus on the right actions—in the right order—that will enable you to create the growth you're seeking. So let's start at the beginning.

## **Step 1: Conduct a situational audit**

The first step is to conduct an extensive internal and external marketing and branding audit to establish some key benchmarks.

For example, internally, you should examine and document previous successes and failures when it comes to your marketing and branding efforts. How can you replicate your past successes and avoid repeating your past failures? Also, take a close look at your marketing team, whether it consists of direct employees and/or external service providers. Do you have the right people with the right level of experience in the right positions? Could a different structure be more effective?

Externally, take a deep dive into all of your current marketing and branding mechanisms that are publicly visible to your target audiences, such as your website, social media channels, printed collateral pieces, visual branding system, news releases, etc. Look for research reports and other information about your customers and prospects, your primary and secondary competitors, and your target markets that can help you make better marketing and branding decisions going forward.

And, most important of all, conduct a thorough “SWOT” analysis to get a firm handle on your current strengths, weaknesses, opportunities, and threats, and use that analysis to inform your marketing and branding plan. In addition, consider developing a “PEST” analysis, which is another similar analytical

framework that may be appropriate if your company or organization is affected by political, economic, social, and technological factors (which many businesses are).

## Step 2: Develop a strategic plan

After completing the internal and external audit, the next step is to create the strategic plan that will guide your marketing and branding decisions for the next one to three years.

A marketing/branding plan is important for a variety of reasons. It will encourage you to take a more thoughtful, strategic, detailed approach to marketing. It will ensure that you align your marketing objectives with your overall business strategy. It will help you focus on the right audiences, messages, and activities. It will provide you with an easily referenced, shareable, modifiable document to follow. And it will enable you to allocate key marketing resources where they will most effectively and efficiently help your organization grow and prosper.

### Related: [How to Fall in Love With Strategic Planning](#)

Depending on the unique circumstances of your situation, your plan might cover a number of topics. But at a minimum, it should examine the following:

- Your organization's mission, vision, goals, objectives, and core values
- Detailed definition of your target market(s), including customer/buyer personas
- Your brand's position, promise, personality, voice, differentiators, and experience
- Value propositions
- Messaging matrix
- Visual identity system

Also, since you're probably interested in growing your business or organization—which is most likely the reason you're reading this article in the first place—a few other topics you might want to consider including in the analysis would be:

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Your plan to scale revenue and profits

- How to effectively manage rapid growth
- Options for raising capital, if needed
- Company culture
- Thought leadership/executive branding

Finally, ask yourself how you will define success or failure, so your progress (or lack thereof) can be accurately and objectively measured.

### **Step 3: Execute the tactics**

The third step focuses on developing a tactical roadmap for the execution of all of your marketing and branding tactics.

Your roadmap should address a wide variety of issues, for example, what digital and analog marketing activities you plan to leverage, how you will increase conversions, and what technology tools (such as a marketing automation system) you plan to use to increase efficiencies and impact the customer journey, to name just a few.

The tactical roadmap will likely be the most detailed component of the process, but it deserves the extra time and attention you'll need to give it, as this is where the rubber meets the road when it comes to ensuring the success of the entire model.

**Related:** [3 Simple Tactics For Making Better Choices](#)

Some examples of the primary questions that should be addressed in your tactical plan would include:

- How will you determine the proper marketing mix (also known as the 4 Ps of marketing: product/service, price, place, and promotion)?
- What infrastructure tools will be implemented? Will a marketing automation system to manage the customer journey funnel be helpful?
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Which digital marketing/branding tools will be needed to help you meet or exceed your goals and objectives?

- Responsive, mobile-first website?
- Content marketing campaigns?
- Permission-based email marketing campaigns?
- An active presence on social media? Facebook? Instagram? LinkedIn? Other channels?
- Search engine optimization? Pay-per-click advertising? Remarketing and/or retargeting?
- Earned media? Paid media? Owned media?
- How will your analog (traditional) marketing tactics be leveraged? Collateral? Events? Print advertising? Direct mail?
- Will one or more partners/external service providers be needed to help with implementing your various tactics?
- What positions and skills will be required for the marketing/branding team to be successful?
- How will the tactical budget be established, segmented, and prioritized?

## **Step 4: Measure the results**

In the final analysis, it's all about results, right?

Step four is focused on accurately measuring the tangible impact of your strategic and tactical activities. Here are a few of the key performance indicators (KPIs) that you should consider tracking on a regular basis to help measure the effectiveness and efficiency of your marketing and branding efforts:

- Overall revenue and profitability growth
- Customer acquisition cost and lifetime customer value
- Net promoter score
- Unique website visitors, organic website traffic, time spent on website, inbound link growth rate, landing page conversion rates, overall website conversion rates
- Social media reach and engagement
- News release “hits”
- Email marketing open, read, and response rates
- Revenue source attribution
- Marketing/branding budget ROI

**Related:** [How to Reduce Customer Acquisition Costs with SEO](#)

The best way to capture KPIs like these and to make the resulting data easy to understand and absorb is to use an automated digital marketing/branding dashboard. There are many such tools available online for a reasonable cost, but if you prefer, you can use a simple spreadsheet, if that adequately meets your needs. The most important point is to measure as much as you realistically can. As Peter Drucker famously said, “What gets measured gets managed.”

## **Step 5: Refine and adjust**

The final step is about continuous improvement. As in life, very little in business remains the same over time. As soon as you’ve figured out how to create real results with your marketing and branding efforts, everything will change. But that’s okay, as long as you prepare for it.

Approach this entire process with an agile mindset. Don’t be afraid to take calculated risks. Learn from your prior wins and losses, and then use the knowledge you gain from those experiences to fuel

higher levels of success for your company. And understand that it's perfectly acceptable to fail—as long as you recognize it quickly and then immediately get up, dust yourself off, and try again. Remember, it's all about continuous improvement.

Finally, if you follow the model outlined above, you'll no doubt be able to create a lean, mean growth machine for your organization that will keep bearing fruit for years to come.

Source: **5 Steps for Creating a Lean, Mean Growth Machine**