



Building Your **Growth** Engine

A Sales & Marketing Framework for B2B
Consulting & Professional Services Firms

Does This Sound Like You?

- ✓ Your business relies heavily on the founder to manage sales, marketing, and operations
- ✓ Your operations and customer experience feel misaligned, leading to missed opportunities and lost revenue
- ✓ Your sales process is inconsistent, and conversion rates are unpredictable
- ✓ You're ready to scale but lack a structured, repeatable process to sustain growth
- ✓ Your marketing efforts generate leads, but turning them into long-term customers feels like a struggle
- ✓ Your team lacks clarity on roles, goals, or priorities, causing delays, confusion, and inefficiencies across departments

**> Then you're in the right place.
Keep reading!**



Meet OTM

Selling expertise in a crowded B2B market is harder than ever. Long sales cycles, misaligned teams, and unclear strategy get in the way of growth. At **OTM**, we help clients overcome those roadblocks by defining a winning strategy, aligning sales and marketing, and building a growth engine that transforms how the business generates and sustains revenue growth.

Our clients are ambitious. They often come to us when they're stuck in the trenches, trying to scale while still handling day-to-day operations. We get it, and we know how to get you out of it. Through our proven **OTM Path to Growth®**, we help businesses like yours transform complexity into clarity and build systems that actually work.

👉 **Curious how we do it?**

Learn more about who we are and our approach → meetotm.com

Why Founder-Led Businesses Struggle to Scale

You're winning clients. But you're burning out.

For founder-led professional services firms, early growth often comes from sheer grit, reputation, and hands-on management. But over time, what once fueled success becomes the very thing that holds the business back. The founder remains the linchpin, driving sales, managing operations, and delivering services, leaving little time, space, or structure for sustainable growth.

👉 Learn more about overcoming these challenges in our article: [**How Founder-Led Businesses Can Overcome Scaling Challenges**](#)

This isn't just exhausting. It's expensive. In fact, the U.S. professional services industry generated over **\$34.43 billion in revenue** in 2024 alone. And this number is expected to reach **\$36.5 billion in 2025** ([Source: Statista](#)). As demand continues, businesses that fail to operationalize and mature will be left behind by competitors who scale faster and more efficiently.

The tension is clear: **you can't scale what only you can do.**

At OTM, we help founders move beyond hustle-driven growth by building the foundation required for scale. Our Path to Growth® framework provides a way forward—starting with a clear strategy (Define), aligning teams and processes (Align), and building systems to grow beyond the founder (Scale).

This guide isn't about how we deliver the work. It's here to help you identify where your current growth system is breaking down and which phase of your Path to Growth needs attention.

It's not about giving up control. It's about building a business that thrives without burning you out.

That's where the Define → Align → Scale process comes in.



The OTM Path to Growth®

A clear path. A complete system. A business that scales.

Define → Align → Scale is part of something bigger: the **OTM Path to Growth®**. Our proven method for helping founder-led businesses move from reactive growth to strategic scale.

Built for B2B service firms, the Path to Growth® connects strategy, sales, and marketing into one unified system, designed to grow with or without the founder in the middle of it all.

Let's Get Started.

Phase 1



Define your market, message, and positioning

Phase 2



Align your people, tools, and processes

Phase 3



Scale your programs, pipeline, and performance

👉 Explore more at meetotm.com/approach

DEFINE



Start With Strategic Clarity

Many B2B founders jump into things like launching campaigns, building websites, or hiring salespeople before they've nailed down a solid strategy. When results fall flat, it's not necessarily because the execution was bad. It might be because key elements of a winning strategy were missing.

Before you can effectively market or sell your services, you need to answer a more fundamental question: **Do you have problem-market fit?**

For early-stage firms, this is a critical first step. Problem-market fit means you've identified a core problem your audience is facing that they care enough to pay you to solve. Only once that's locked in can you validate your market positioning, refine messaging, and move toward product-market fit.

Too often, founder-led businesses try to scale without truly knowing:

- What problem they solve
- Who they solve the problem for
- Why it matters in the market (who cares?)

Without this clarity, tactical work becomes expensive guesswork.

Key Challenges

- Winning deals against competitors due to pricing or experience
- Building your pipeline (all leads are generated from referrals)
- Messaging that feels inconsistent, generic, or hard to explain

DEFINE



Where to Focus

Market Positioning

Market positioning is all about context. It's how buying criteria is set, and when you're positioned well, it's why you close more deals.

True positioning includes:

- Defining the market you're in and who or what you're competing against
- Clarifying how you win with differentiation that clients care about
- Understanding your ideal clients and their problems
- Telling a clear, client-centric story that aligns your team around the problem you solve for your ideal client

[Download our B2B Positioning Resource for Pro Serve Firms to start refining your foundation.](#)

You can't inspire action without first knowing who you're talking to. Clear, aligned messaging starts with a deep understanding of your ideal clients.

- **ICPs & Personas:** Go beyond job titles. Dig into motivations, pain points, and buying behaviors so sales and marketing stay focused.
- **Storytelling & Messaging:** Use a client-centric framework to speak to your audience's journey, not just your offerings. The result: messaging that is focused, memorable, and aligned across teams.

Together, these elements ensure you're speaking to the right people with the right message, consistently and effectively.

DEFINE

SELF-ASSESSMENT



Ask Yourself

- ☐ Do I know who my best-fit customers are and what they care about?
- ☐ Can I articulate the core problem we solve?
- ☐ Is it urgent and expensive enough for our ideal client to care?
- ☐ Would every member of my team give the same, clear answer to what sets us apart?
- ☐ When a best-fit prospect lands on our website or hears our pitch, do they instantly recognize that you solve their specific problem(s)?

If you answered “no” or you’re not sure, the Define phase is where you should focus first. You can’t scale what isn’t clearly defined.

Wondering when to bring in expert support? [Check out our guide on when to hire a marketing agency to know when it’s time to get outside help.](#)

ALIGN



Connect Marketing and Sales to Unlock Growth

Once your strategy is defined, the next step is making sure your people, processes, and platforms are aligned to support scale.

This is where many founder-led businesses get stuck.

The founder (or small leadership team) is still involved in every decision, campaign, or deal, creating a bottleneck that prevents the business from building predictable momentum.

The solution is to connect and align marketing and sales. This is about more than collaboration, it's about **designing systems that generate, qualify, and convert leads without relying on the founder.**

This is the phase where operational maturity starts to take shape. You move from ad hoc activity to defined processes. From isolated efforts to shared goals. From guessing at the customer journey to mapping it intentionally.

This section of the guide will help you assess whether your business is aligned and where it may be falling short.

ALIGN



Key Challenges

- You're operating without data or bad data
- Marketing and sales feel like separate conversations
- You're still the one closing every deal or managing every handoff
- There's no consistent or repeatable sales process
- The customer experience varies wildly from prospect to prospect

Where to Focus

Defined Customer Journey

Have you mapped out the full customer experience, from first touch to closed deal? A defined journey makes it possible to create targeted marketing and coordinated sales efforts that meet buyers where they are.

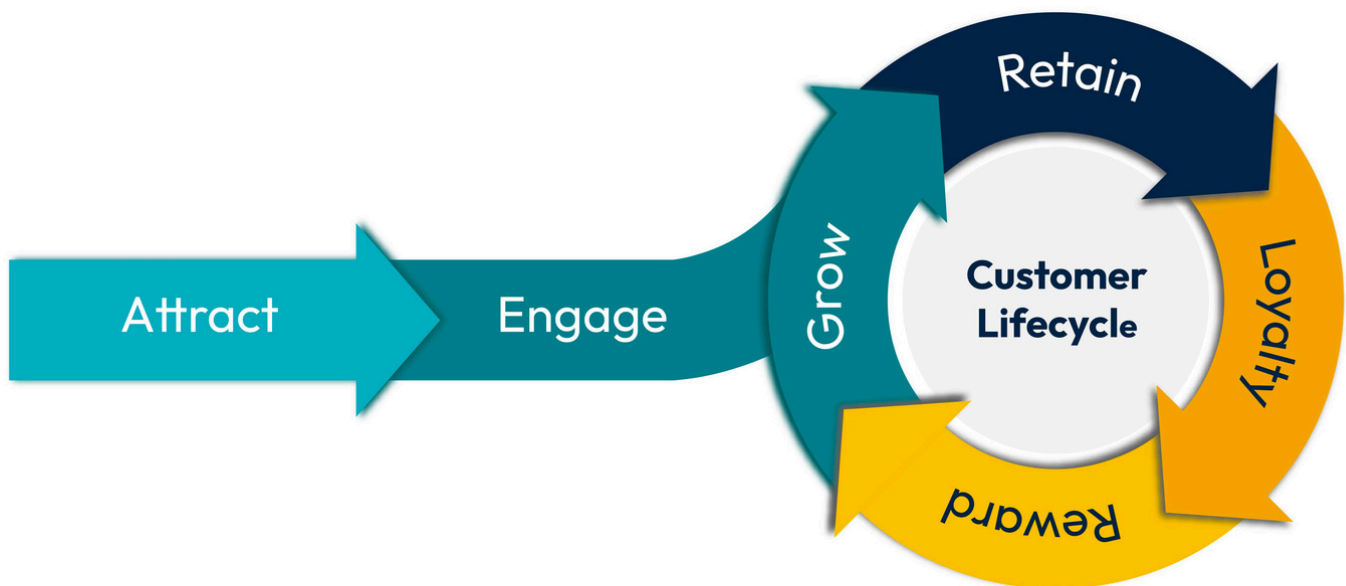
	Awareness	Consideration	Conversion	Retention
Goals	Customer Goal	Customer Goal	Customer Goal	Customer Goal
Obstacles	List Obstacles	List Obstacles	List Obstacles	List Obstacles
Opportunities	List Opportunities	List Opportunities	List Opportunities	List Opportunities
Marketing Goals	List Goals	List Goals	List Goals	List Goals
Touchpoints & Tactics	Touchpoints Tactics	Touchpoints Tactics	Touchpoints Tactics	Touchpoints Tactics

ALIGN



Clear Sales Process

A strong sales process isn't just for salespeople. It's a key alignment tool. When everyone knows what happens at each stage and what "qualified" actually means, you create consistency and reduce friction across the funnel.



Tech-Enablement

If you're still managing leads in spreadsheets or relying on memory, you're not ready to scale. Alignment requires systems, like CRMs, marketing automation, and reporting tools, that support collaboration and drive visibility.

ALIGN SELF-ASSESSMENT



Ask Yourself

- ☐ Have you mapped the customer journey from awareness to conversion?
- ☐ Is your sales process defined, documented, and repeatable?
- ☐ Are your sales and marketing teams aligned on goals and strategy?
- ☐ Do you know exactly where every deal stands, and who's responsible for moving it forward?
- ☐ Do you have a CRM in place to manage and track leads?
- ☐ Do you have automations in place to nurture leads, track engagement, and reduce manual admin?

If you answered “no” to any of the above, you need to align your team before you start trying to scale your efforts.

Want to dig deeper? [Read our guide on Aligning Sales and Marketing for Scalable Growth](#) to explore what alignment really looks like in founder-led businesses.

SCALE



Building a Scalable Growth Engine

Once strategy and systems are in place, **it's time to scale**. The goal is to build a scalable growth engine that generates consistent revenue without dependency on the founder. This phase focuses on executing, analyzing, and optimizing for sustainable growth.

Key Challenges

- Key sales and marketing decisions still require founder input
- Unclear goals or KPIs (both for the company and for individual marketing and sales activities)
- Limited resources (time and money) and lack of efficiency
- Poor execution (targeting is missing, branding is lackluster, message is confused)

Where to Focus

Operational Systems

Documented, repeatable processes for sales, delivery, and onboarding

Growth Infrastructure

Tools, automation, and reporting that scale without adding headcount

Team Enablement

Clear roles, autonomy, and accountability

Performance Management

KPIs (Key Performance Indicators) that are visible and meaningful

SCALE

SELF-ASSESSMENT



Ask Yourself

- ☐ Can you confidently say your go-to-market strategy aligns with your long-term business goals?
- ☐ Do you have clear answers to how revenue is generated, measured, and optimized across your entire customer journey?
- ☐ Is there a defined system for analyzing sales and marketing performance and adjusting your strategy based on what's working?
- ☐ Do you have strategic clarity on when and how to invest in expanding your team, rather than reacting to bandwidth issues?

Dig deeper into these questions.

Discover [Strategic Insights for Scaling Your Business](#).

See Define → Align → Scale in Action

We've supported firms from early-stage positioning to scaling established sales engines. **Here are a few that stand out:**



Driving Brand Awareness and Lead Generation in the Colorado SMB Market for [StaffScapes](#)

Challenge: Misaligned sales and marketing, inconsistent pipeline

Focus Areas: Define + Align

Breakthrough:

- Built a unified customer journey
- Improved lead tracking and CRM visibility
- Increased retention and consistency across pipeline



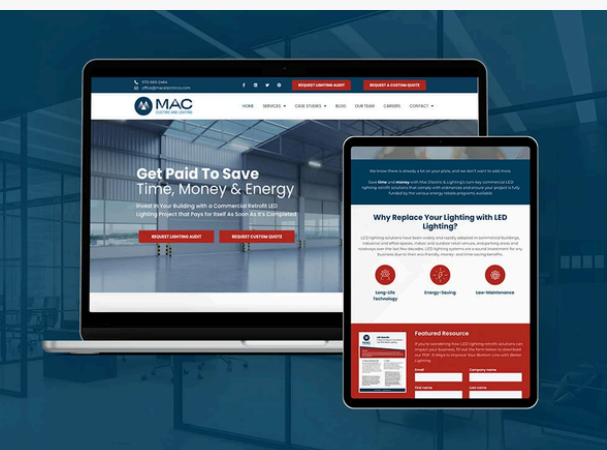
From Referrals to Revenue: How [Karrikins Group](#) Built a Scalable Marketing Engine

Challenge: No clear demand generation strategy or operational infrastructure to support growth

Focus Areas: Define + Scale

Breakthrough:

- Clarified the firm's market position and key differentiators
- Established a unified customer journey across marketing and sales
- Implemented a scalable CRM and integrated lead tracking
- Created a repeatable marketing engine to support new client acquisition



From Low Visibility to High Impact: How [Mac Electric](#) Turned Online Traffic Into Commercial Leads

Challenge: No visibility into pipeline performance

Focus Areas: Align + Scale

Breakthrough:

- Implemented a CRM system
- Aligned sales processes
- Achieved better sales forecasting and operational efficiency



How to Get Started

If you're ready to stop guessing and start scaling, let's talk.

Whether you're struggling with elements of Define, Align, or Scale, we can help you uncover the gaps and build what comes next.

Scaling a founder-led business isn't easy, but it's possible.

👉 Schedule a [15-minute discussion](#) and take the first step toward building a business that grows beyond you.

Phone:
970.568.5250

Address:
400 Remington, Suite A
Fort Collins, CO 80524

meetotm.com