



CreateTailwind Uses FounderScale Solution To Grow Sales Operations

At a glance

CHALLENGES

- Need for a redesigned Sales and Marketing strategy
- Optimized Website
- Clear Messaging for Target Audience
- Internal Resources
- Resource Constraints

BENEFITS

- Focused Strategy
- Customized Solution
- Increased Brand Awareness





"We quickly realized that we needed a well-designed sales and marketing strategy to help us redefine client expectations and connect with our target demographic in a meaningful way – and we didn't have the time to manage that process internally while growing our business. That's where FounderScale came into play." -- **Nick Kosko, Strategic Wealth Coach**

THE CHALLENGE

As a visionary in the financial planning and investment space, CreateTailwind needed to develop an impactful sales and marketing plan that effectively encapsulated their brand identity and messaging to its targeted demographic. Nick Kosko, CreateTailwind's Wealth Strategist, recognized that the company didn't have the internal resources needed to develop an effective sales and marketing presence to grow the business.

"Most people have an already established concept about what wealth coaching looks like," explained Kosko. "Often, prospective clients come to CreateTailwind assuming that we'll develop a financial portfolio for them. That's just not what we do. Our goal isn't to manage clients' investments on their behalf. Instead, CreateTailwind's primary focus is educating and equipping people with the tools they need to free themselves from financial burdens. We make it our mission to teach people to ultimately take charge of their financial journey and be their own banker. We quickly realized that we needed a well-designed sales and marketing strategy to help us redefine client expectations and connect with our target demographic in a meaningful way – and we didn't have the time to manage that process internally while growing our business. That's where FounderScale came into play."



-  Create Tailwind
-  Financial
-  Dakota Dunes, SD
-  www.createtailwind.com

THE SOLUTION

CreateTailwind utilized a customized FounderScale solution to develop its sales and marketing materials and operations. Explicitly designed for small to mid-sized businesses, FounderScale recognizes that founder-led companies have distinctive sales and marketing needs. However, much like CreateTailwind, most owners of these enterprises don't have the bandwidth needed to mentor and grow a capable sales team.

Josh Sweeney, the owner of FounderScale, noted that, "FounderScale offers a unique opportunity for smaller and startup businesses to outsource sales and marketing development to a highly skilled team of selling professionals, without incurring the costs of bringing on a full-time, internal employee. We analyze the resources and strengths each client offers to generate a focused strategy that effectively fills in any performance gaps, saving our clients time, energy, and money."

The FounderScale Program is broken down into four mission-critical components:



PEOPLE

FounderScale augments sales infrastructure, leveraging its own internal team members, or managing the hiring process for clients to find the best possible staffing fit.



ENABLEMENT

FounderScale takes a deep dive into the customer journey, generating a diverse range of marketing material and content to keep prospects informed and engaged.



OPERATIONS

The program leverages a wide range of essential selling and management best practices to streamline efficiencies, including:

- Weekly activity reports
- Performance dashboards
- CRM systems
- Marketing alignment/automation
- Marketing alignment/automation
- Training
- Data analytics



OUTREACH

Finally, FounderScale helps drive outbound sales volume, utilizing multiple platforms and strategies:

- One on One Meetings
- Lunch and Learns
- Podcasts
- Social media
- Email campaigns
- Targeted Ads



"WE QUICKLY REALIZED THAT WE NEEDED A WELL-DESIGNED SALES AND MARKETING STRATEGY - AND WE DIDN'T HAVE THE TIME TO MANAGE THAT PROCESS INTERNALLY WHILE GROWING OUR BUSINESS. THAT'S WHERE FOUNDERSCALE CAME INTO PLAY."

NICK KOSKO,
CREATE TAILWIND

SIGN UP FOR UPDATES
www.founderscale.com

FounderScale consulted extensively with CreateTailwind stakeholders to identify specific sales and marketing needs, goals, and overall vision. From there, the FounderScale team crafted a customized solution to fill in existing gaps as well as support CreateTailwind's increasing marketplace momentum.

THE RESULTS

CreateTailwind's newly launched sales initiative has already yielded several significant results. Over the last 30 days, the company's LinkedIn profile has experienced:

* 2169% increase in 90 day profile views

* 482% increase in general profile views

* 4061% increase in post views

* 50% increase in followers

"Since bringing on FounderScale, we've already noticed more traffic to our website and our podcasts."

Beyond a significant upswing in online attention, FounderScale has also helped to expand CreateTailwind's brand reach and recognition amongst the company's designated client demographic. Kosko noted that the FounderScale solution, coupled with Josh's extensive professional background, have both helped boost his company's success with the program.

"Since bringing on FounderScale, we've already noticed more traffic to our website and our podcasts. However, it's important to mention that Josh specifically has played a key role in the results we've seen so far. Josh isn't just a sales and marketing specialist - he is a true entrepreneur who understands firsthand the struggles that come with running a founder-led business. I knew after our first consultation that he truly recognizes our challenges and knows how to devise a customized solution that resolves them quickly. FounderScale has helped establish CreateTailwind's infrastructure and internal best practices, enabling me to stay focused on growing the organization."