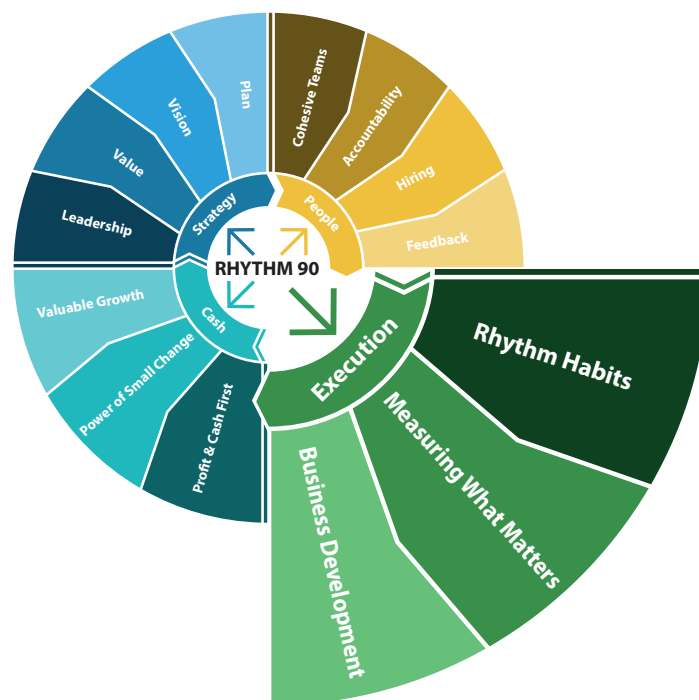




Execution Pillar/ Business Development – Using DREAM to bridge the Sales Gap



- Those accountable for marketing and sales have individual 'cookbooks' (activity plans) that are tracked and reviewed
- Budgets are in place and monitored against results for all lead generation activities

For a podcast deep dive into the concepts outlined in this booklet,
scan the QR code:



Bridging the Sales Gap with DREAM

Introduction

Bridging the sales gap is one of the most pressing challenges for small and medium-sized businesses. Often, we find ourselves struggling to connect ambitious revenue goals with practical actions that yield results. The **DREAM© framework**, a cornerstone of the Entrepreneurial ScaleUp System, offers a structured and actionable solution to this issue. By addressing five key areas—Ditch, Re-engage, Expand, Acquire, and Maintain—DREAM helps businesses align their marketing and sales strategies and forecasts, fostering growth through targeted, client-specific tactics.

In this booklet, we'll explore:

1. The DREAM framework as a comprehensive marketing planning tool.
2. Strategies for each DREAM category, with an emphasis on specificity.
3. A case study: Clifford Springs' 10% growth success story.
4. Integrating DREAM with tools like the Lead Generation Matrix and SmartWeb for optimal results.

Understanding the DREAM Framework

The DREAM tool builds on the **Ansoff Matrix**, guiding businesses to identify growth opportunities within existing and new customer bases. Here's how it works:

1. **Ditch:** Identify and let go of unprofitable or misaligned customers. This frees up resources to focus on high-value clients.
2. **Re-engage:** Reconnect with lapsed customers who could still benefit from your offerings.
3. **Expand:** Grow revenue from existing customers by upselling or cross-selling.
4. **Acquire:** Target new customers, being specific about who they are.
5. **Maintain:** Retain valuable customers with strategies to ensure ongoing satisfaction and loyalty.

By breaking down your customer base and applying tactics for each segment, DREAM ensures a balanced approach to growth, emphasising both retention and acquisition.

DREAM©

Ditch	Re-engage	Expand	Acquire	Maintain
Existing	Lapsed	Existing	New	Existing

DREAM in Action: A Step-by-Step Breakdown

A hallmark of DREAM is its focus on detail. It's not enough to generalise; you must name clients, define clear goals, and outline actionable tactics.

You can run through DREAM in any order, but we recommend leaving the 'A' for Acquire until last. If you start by identifying your revenue goals and the gap from where you are (ideally as part of the SmartWeb 3 year plan and 1 year critical paths), you can then run through the exercise for D,R,E and M. None of these require finding new customers, they are all current or lapsed – so you can be really specific about individual companies, what change in sales you will aim for from each, what products or services this would come from, what tactics you will use to deliver the sales and who will be accountable for it. Once you have done this, add it all up and calculate the remaining gap. This then tells you how much needs to come from acquiring new customers (the A). It also helps you to think about where to spend your time and money – if you can see that you can bridge most of the gap through re-engaging with lapsed customers, then you should focus on this and allocate the resources required. Equally if you identify that you still have a big gap that needs to be filled by acquiring new customers, then you know that you are going to have to make sure your lead generation activities are effective. So essentially you are using DREAM to build your marketing plan, and help you to turn your sales ambitions into a plan with a forecast.

1. Ditch: Prioritize Your Time and Resources

Not all customers contribute positively to your business. Some may drain resources without delivering proportional value. Start by evaluating your current customer base. Identify clients whose demands outweigh their contributions and consider reallocating that time and effort to more profitable opportunities.

Key Questions:

- Which clients consume disproportionate time for low returns?
- Are there clients we have outgrown as our business has evolved?

By removing unprofitable clients, you free up resources to focus on growth opportunities that truly align with your goals.

2. Re-engage: Revive Past Relationships

Lapsed customers often represent untapped opportunities. These are individuals or businesses who once valued your offerings but have since disengaged. Re-engaging them is typically more cost-effective than acquiring entirely new clients.

Tactics to Re-engage:

- Send personalised updates or offers based on their previous interactions.
- Use a feedback loop to understand why they left and what might bring them back.

Forecast Insight: Estimate potential revenue from re-engaging a set number of lapsed clients, using past purchase patterns as a guide.

3. Expand: Unlocking Additional Potential

Growth opportunities often lie within your existing client base. Look for customers who could benefit from additional products or services you offer. Whether through upselling, cross-selling, or exploring new solutions, expanding relationships with these clients can significantly boost your revenue.

Practical Steps:

- Identify complementary products/services your customers aren't currently purchasing.
- Schedule a 90-minute strategy session to brainstorm upselling opportunities.
- Set measurable targets for each client.

Forecast Impact: Assign specific revenue goals to these expansions and incorporate them into your turnover projections.

4. Maintain: Retain Value Without Overinvestment

Next, identify clients you aim to **maintain**—those delivering consistent, satisfactory results without needing immediate growth. These clients form the foundation of your forecast, representing a stable, predictable revenue stream.

Action Point: Develop simple strategies to nurture these relationships, ensuring loyalty and ongoing engagement without overextending resources.

Forecast Tip: Record their current contribution to your turnover and forecast it as a baseline for the year.

5. Acquire: Targeting New Customers

Finally, focus on acquiring new clients. Instead of casting a wide net, DREAM encourages specificity. Identify sectors or individual businesses you'd like to work with, and create tailored strategies to reach them.

Action Plan:

- Name 5-10 specific prospects for 'targeted' activities
- Use the 'Lead Generation Matrix' to brainstorm and prioritise a small number marketing activities that you can do 'really well'.

Forecast Enhancement: Allocate projected revenue contributions from these new acquisitions based on historical data or market research.

This is where you might also like to bring in the Lead Generation Matrix to help you to brainstorm and prioritise lead generation activities to bring in new clients. It is the subject of another monthly theme, but it works well in conjunction with DREAM.

Audience/Who for?			
		Known/Existing Relationships	Unknown/New
Type of Activity	Seeds	1	2
	Nets	3	4
	Spears	5	6

From Targets to Forecasts

DREAM is more than just a targeting tool—it's a comprehensive forecasting system. Once you've stratified your clients into the five DREAM categories and developed tactical plans for each, you can aggregate these insights into a forecast. Here's how:

1. **Quantify Contributions:** Assign potential revenue values to each action plan, whether it's maintaining current clients, expanding accounts, or re-engaging lapsed customers.
2. **Account for Ditching:** Deduct revenue from clients you're letting go to get a realistic forecast.
3. **Summarise Your Forecast:** Combine all categories into a single forecast for the year, giving you a tangible roadmap to achieving your turnover goals.

Case Study: Clifford Springs – A Turnaround Story

Clifford Springs, a specialist manufacturer of springs for seals and valves, faced years of stagnant and slightly declining sales. The leadership team struggled to pinpoint where growth could come from in a competitive market. That's when they turned to the **DREAM© framework**, which transformed their approach to business development.

By applying DREAM, they identified lapsed clients as a significant untapped opportunity. This insight shifted their marketing focus to reconnecting with these former customers. The team implemented targeted campaigns tailored to the specific needs of these clients, including personalized outreach and highlighting updates to their product range.

This strategic focus yielded remarkable results: Clifford Springs achieved a **10% uplift in sales within 12 months**. Encouraged by this momentum, the company continued to apply the DREAM framework to other areas, sustaining growth over the following years. Ultimately, this newfound success attracted the attention of an acquirer, leading to a lucrative sale of the business.

The Clifford Springs story demonstrates the power of specificity and focus inherent in DREAM. By re-engaging lapsed customers, they bridged their sales gap and unlocked a future of possibilities. This example highlights how even in a niche industry, DREAM can drive tangible, transformative results.

DREAM Accountability: Turning Plans into Results

To ensure execution, assign ownership of each DREAM category to specific team members. Accountability drives results, keeping your forecast on track and ensuring that your DREAM doesn't fade into a "wish."

Integrating with Existing Tools

To maximize DREAM's potential, integrate it with other BizSmart resources:

1. **Lead Generation Matrix:** Streamline efforts across Seeds, Nets, and Spears. For example, use content marketing (Nets) to attract leads, then follow up with direct outreach (Spears).
 2. **SmartWeb:** our strategic planning tool to develop your 3 year plan
 3. **Smart90 Planning:** Incorporate DREAM tactics into your 90-day planning cycle, ensuring focus and accountability.
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Suggested 90-Minute Activity

Here's a focused exercise to kickstart your DREAM strategy:

1. **Segment your customer base:** Create a list for each DREAM category.
 2. **Develop tactics:** For each list, outline one specific action per client or prospect. Use the Lead Generation Matrix to help.
 3. **Assign accountability:** Ensure team members are responsible for implementing and tracking these actions.
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Conclusion

The DREAM framework isn't just about bridging the sales gap—it's about creating a sustainable growth strategy that aligns your efforts with your business goals. By focusing on specificity and integrating complementary tools, businesses can achieve remarkable results.

If you have further questions about implementing the DREAM framework, feel free to contact the BizSmart team or explore additional resources in **The Entrepreneurial ScaleUp System**. Equally let us know if you would like us to come in for a DREAM half-day workshop with your team.

Take the first step today: Dream it. Plan it. Achieve it.

Relevant examples from ScaleUp Radio guest interviews

Steve Borwell-Fox (Telecetera) Episode 385:

- **Proactive Customer Contact:** Steve shared that their business reaches out to customers proactively to check on their experiences and inform them about new features or updates. This consistent and personal engagement has helped them retain clients and scale their cloud-based solution.

Lucie Grech (Cypress Quay) Episode 320:

- **Transitioning to Membership Models:** Lucie mentioned moving clients from one-off purchases to membership models. They achieved this by offering perks like welcome packs, special gifts, and clear explanations of the benefits. Ensuring staff are well-trained in conveying these benefits was crucial to success.

David Harkin (8billionideas) Episode 307:

- **Focus on Retention and Growth:** David emphasized nurturing long-term client relationships, particularly in later years. They analyze drop-offs to identify issues like personnel changes and ensure early adopters remain satisfied and supported.

Jonathan Guy (Aqueous Digital) Episode 277:

- **Recurring Revenue Model:** Jonathan stressed the value of a recurring revenue model combined with excellent client retention. By ensuring consistent and high-quality service, they foster long-term customer relationships and exponential revenue growth.

Ross Latta (MacroFin) Episode 303:

- **Leveraging Referrals and Past Relationships:** Ross highlighted the importance of maintaining strong relationships with CFOs, who often move between companies and bring MacroFin along for new projects. This approach relies heavily on delivering high-quality work that earns trust and repeat business.

Jonathan Harris (Brightside) Episode 283:

- **Retention as a Growth Driver:** Jonathan discussed the importance of client retention in business growth. Transparency in communication, especially when addressing challenges, was highlighted as a key factor in retaining clients and building trust.

