

# Driving Growth Through Coordinated Marketing Efforts

How a National Preferred SBA Lender Grew Application Volume

## The Challenge

A national SBA lender's growth depended on consistent engagement with referral sources like business attorneys, CPA's and financial planners. However, Business Development Officers (BDO's) were responsible for creating and managing their own marketing, which took time away from primary sales activities. And, BDO's are not trained in marketing or graphic design. This resulted in inconsistent branding, uneven referral touchpoints, duplicated effort across the sales team, and less time for direct sales activity.

Leadership needed a scalable way to stay top of mind with valuable referral partners while allowing sales teams to focus on originating and closing loans.



## The Approach

A centralized marketing program was implemented to support ongoing, coordinated engagement with referral sources across all markets.

Key initiatives included:

Branded email campaigns designed to keep the organization top of mind

LinkedIn content and outreach frameworks reinforcing name recognition and brand consistency

Story-driven content highlighting outcomes, closed deals, and "tombstones" to reinforce credibility

Custom video library highlighting customer success stories, product and process details, and value propositions

Consistent graphic design across all external-facing materials

Event and seminar marketing support with coordinated follow-up

Customized market support

Shared insights to replicate high-performing campaigns

This approach enabled the bank's SBA division personnel to be "top-of-mind" by repeatedly sharing and highlighting the successes of the organization.

## The Results

The coordinated strategy delivered measurable gains in visibility, efficiency, and production:

- ✓ 81% increase in SBA 7(a) application volume (year over year)
- ✓ 57% increase in total loan closings (year over year)
- ✓ Increased referral partner engagement and inbound referral activity
- ✓ More time spent by loan officers on relationship-building and deal execution

## The Impact

### Top-of-Mind Presence

Consistent branding, messaging and success stories that reinforced credibility and recall

### Brand Consistency

A unified, professional presence across all referral touchpoints

### Time Savings

Sales teams spent less time marketing and more time selling

### Best Practice Sharing

Proven messaging and campaigns scaled across markets

### Business Growth

Higher output without adding sales headcount



## Executive Takeaway

SBA growth is driven by referral trust and recall. By centralizing foundational marketing and consistently sharing brand, stories, and outcomes, this organization stayed top of mind with referral sources—turning marketing into a sales multiplier.

A smarter way to grow.®

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