

The Successful Social Entrepreneur's *Micro Guide*

From first idea to full scale — a field-tested roadmap for social entrepreneurs who build things that matter.

■ Pre-launch

■ Read: *The Lean Startup* — Eric Ries

- **Formulate a key strategic idea** for why your solution is going to work. A good strategic idea is simple, new, bold, and generative. It may have several components that work together.
- **Write a concept note**, use it to collect feedback and funding. Explain your value proposition clearly.
- **Define your impact thesis** — what change will you measure? Social entrepreneurs need this from day one, not as an afterthought.
- ■ **Choose your legal structure wisely** — nonprofit, social enterprise, hybrid? This shapes everything downstream.
- **Secure seed funding** as validation of your idea.

■ Pilot

■ Read: *Crossing the Chasm* — Geoffrey Moore

- ■ **Start with a part of your project that's easy to implement.** There may be 3–4 pillars in your business.
- **Find your first client.** Who actually wants your service?
- ■ **Explain your theory of change as a virtuous cycle** — this is powerful.
- **Consider a co-founder** who complements you: one focussed on sales, the other on operations. One more reason to have a complementary co-founder.
- **You are doing most of the work at this stage.** Endure! Later you can hire to delegate what you're not good at.
- **Disrupt from below.** Take the lowest, least prestigious segment that nobody else wants. No competitors will be watching you, giving you a couple of years to perfect your business before you rise up the food chain. This approach works!
- ♥ **Focus on the few clients you have**, not on getting more. Make them happy. The rest will grow from referrals once you've refined your service.
- **Start telling your story early** — document the journey, collect testimonials, build narrative capital. You'll need it for funders and partners.
- **This part may be hard** — the successful entrepreneur is the one who endures the pain of this stage and does not give up.
- **Protect your energy.** Founder burnout kills more ventures than bad ideas. Build recovery into your rhythm, not around it.
- **Experiment, experiment, experiment.** See what works best — what formats, what formulas.
- **Be ready to pivot on the "how"** — seize opportunities — but stay on course with your main strategic idea.

■ Development

■ Read: *Scaling Up* — Verne Harnish

- **Add a second and third pillar** to your business.

- **This part will get easier** as you already have a few staff to help you.
- **At one point, you will start to feel lift.** Clients arrive more easily. It means you have reached product-market fit.
- **First staff:** look for commitment, attitude, values. Nobody cares what or where they studied. You may not afford senior people yet — it's not important at this stage.
- **Daily standup meetings** to keep everybody aligned and share information.
- **Get the right people on the bus,** get the wrong people off the bus, put them in the right place. Hire fast, fire faster.
- **Look for partnerships,** network effects, co-funders, and other forms of leverage.
- **Build a simple impact measurement system** — track 3–5 indicators that prove your theory of change works. Funders increasingly demand this.
- **Diversify revenue streams** — grants, earned income, consulting, licensing. Single-source dependency is fragile.
- **Document your processes and systems** — checklists, leaflets, spreadsheets.
- **Look for alignment with clients** — demonstrate it. It has to be real.
- **Earn your place in the ecosystem** — be useful to the stakeholders.
- **Listen really carefully to clients.** Ask about difficulties or challenges — it will allow you to imagine new services and offerings.
- **Invest in culture deliberately.** As you move from 3 to 15 people, culture stops being implicit. Name your values and live them.
- **Be relentless on improving the service and product.** Complacency kills. Make sure your clients love what you do. Give every engagement that special touch.
- **Obsess about quality and execution.** Outcompete with hard work, challenging yourself continually, being honest with your clients, owning screwups.
- **Discuss strategy once a week.** Have your strategy on one page with the principles, then an agile list of elements to implement or execute.

■■ Scaling

■ **Read: *Good to Great* — Jim Collins**

- **The lift accelerates.** Clients line up and bang on the door where before you had to court them.
- **Add a fourth pillar** to your business.
- **Find the main economic drivers and ratios of your business** — e.g. income per team member, overhead ratio, cost per outcome. As the Agile Strategy approach suggests, identify a small set of key metrics that tell you whether the engine is healthy. This will allow you to scale securely.
- **Adapt the meeting plan as you grow** into teams — but meet! If people don't meet, silos happen.
- **Start hiring more senior people** now that you can afford it.
- **Look for efficiency and automation,** eliminate monkey work.
- **Look at what's causing you the most pain,** what you can safely delegate, and hire someone for that job.
- **Delegate, hand over to team members,** keep them growing and happy.
- **Understand the motivations of your individual team members** and ensure they can find fulfilment by working inside your organisation.
- **Define roles and structure** in a smart way that allows you to add people as you grow.
- **Build your team with personality insights.** Use tools like MBTI, DISC, or **Persona360** to understand what personality fits best in what role. Persona360 offers a modern, evidence-based approach that goes beyond traditional categories.

- **Key roles:** if you want good strategy, have a strategy officer. If you want good quality, have a quality assurance officer. Build the structure your ambitions demand.
- **Think about succession early.** The founder can't be the bottleneck forever. Build systems that work without you.
- **Consider replication models** — licensing, franchising, open-source methodology. How does your impact multiply beyond your direct reach?
- **Become a thought leader** — write, speak, publish. Your ideas deserve to spread and it feeds the business.

■ Celebrate your success!

Now go mentor the next generation of social entrepreneurs.

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