

How a Three Month Sales and Marketing Leadgen / Pipeline Building Campaign Works to Generate New Business

Services performed by our industry-renowned staff. Detail-oriented prospecting based on thorough preparation and collaboration to bring joint efforts to fruition. Nationwide network of more than 1,000 financial services contacts. Exceptional grasp of cutting-edge technology resulting in speedy sales and marketing programs.

Specialties include rapid initiation, utilization and supervision of structured methodical prospecting, our proprietary follow-up process and social media marketing to open doors rapidly to build a pipeline of new deals and win new business.

Services provided:

- Targeted calling into named accounts and/or territories
- Identification of opportunities
- Pipeline building
- Clarification of parent organizations and associated companies
- Recognition of decision making locations
- Location of key executives within each firm
- Product message and packaging creation for the U.S. marketplace
- Personalized email campaigns
- Administration and management of database updates
- Establishment of a HubSpot or alternative CRM system
- Enhance existing sales and marketing resources and CRM
- Communication of relevant market data to Customer

Example - Strategy Workflow



Example - 3 Month Project for 12 weeks of 20 hours per week

Delivery Time	90 Days
Hour of Work per Month	80
CRM Database	up to 700 contacts
Number of Outreaches	900
Projected Number of Meetings/Deals	based on client's specifications
CRM Formatting and Clean Up	✓
Creation of Sales Pitch	✓
Creation of Call Scripts	✓
Develop and Enhance Email Strategy	✓
Lead Nurturing	✓
Management Reporting	✓