

Case Study



Client

- ✓ Leading Financial Service Advisory Specialist

Business Issues

- ✓ Manage inbound responses from Direct Mail
- ✓ Generate a consistent pipeline of New Business Appointments for the Directors

Solution

- ✓ **IGNITE New Business** by identifying qualifying companies and eliminating non-qualifying companies.
- ✓ **NURTURE New Business** using telephone contact to complement existing direct mail activity.
- ✓ **BOOST New Business** with a sales pipeline management process.

Result

- ✓ **A consistent and measurable approach to inbound enquiries.**
- ✓ **Delivering Qualified Appointments**
- ✓ **Building and enhancing the Prospect Database**

This leading financial services advisory specialist has over 20 years' experience in business funding, wealth management and employee benefits. Previously inbound enquiries and appointment generation activity had been handled in-house. With the ACCELERATOR Programme they have been able to increase activity and focus the Directors time on qualified opportunities.

This client had an established direct mail campaign with telephone follow up and outbound telephone activity. While the programme was working well the Directors were frustrated with the time taken to sift through unqualified contacts to generate bookable appointments.

IGNITE New Business

The Newbury Group has been able to take over the handling of inbound enquiries and managing all outbound telephone contact, freeing the Directors to be wholly focused on new business opportunities.

We have built on the clients established direct mail and telephone contact strategy taking on the inbound response handling and outbound nurturing and appointment setting elements. With this process we qualify and eliminate leads ensuring only the valid opportunities are passed to the client.

NURTURE New Business

We provide a highly articulate, mature and business experienced team who are able to engage at the right level with business owner-managers and senior financial contacts.

Having started working on a project focused on talking to owner-managers, as the business relationship has developed, we have been engaged to undertake further projects including engaging with Employer Pension Funds around a consultancy proposition to generate Finance Director and Pension Manager Leads.

BOOST New Business

We put in place a sales pipeline management process, supporting the client to ensure all opportunities are consistently worked over time to ultimate sale.

We delivered full reporting of the end-to-end process showing ROI on delivered activity.

Client Success

Through the ACCELERATOR programme the client now has a consistent and measurable approach to new business generation.