

# iLeadFarmers Case Studies

## **ITES company – Sales Support**



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## SECTION 1 – BUSINESS CASE

A Boston, USA Company in the ITES domain providing IT based financial solutions to target audience in USA required a Sales Support team in India to support its Sales professionals based out of Boston.

The company offered Business Process Automation (BPA) to Finance companies in USA and had its own platform specialized for Finance processes that enabled BPA.

The requirement was to create a team of professionals in India that have expertise in gathering Marketing Intelligence, Buzz Marketing, Email Campaigns, Writing Marketing content and initial customer interaction.

The company was about to launch a financial portal for which they required the team to work with the Sales team in Boston and the Management team to support all the activities related to the launch & buzz marketing of the portal.

## SECTION 2 – THE CHALLENGE : ESTABLISH THE TEAM & START OPERATIONS

### 2.1 SUPPORTING THE SALES PROFESSIONALS IN BOSTON

The Sales support team in India would carry out the following functions for supporting the Sales department in Boston.

Support activities	
<b>Research &amp; tracking Target audience</b>	<p>As the company dealt with the Finance vertical in USA which is very vast there was an urgent requirement to research and keep track of activities for the target audiences on the sell side &amp; buy side in the following domains:</p> <p>Mutual Funds, Hedge Funds, Venture Capital, Private Equity, Investment Banking, Wealth Management and Emerging Markets.</p> <p>In each of the domains information was required to be mined from the internet about professionals having the following designations:</p> <p>CEOs, Portfolio Managers, Managing Directors, CTOs, COOs.</p>

<p><b>Creating the Databases &amp; maintenance</b></p>	<p>Databases were to be built ASAP. The Database required to be maintained and updated with people moves, promotions and new appointments.</p> <p>Databases were required for the following sectors:</p> <p>Mutual Funds, Hedge Funds, Venture Capital, Private Equity, Investment Banking, Wealth Management and Emerging Markets.</p> <p>The Databases would consists of the names and contact details such as email, phone number, title, profile info, department etc..) for the target audience:</p> <p>CEOs, Portfolio Managers, Managing Directors, CTOs, COOs.</p>
<p><b>Marketing Intelligence</b></p>	<p>The following was the requirement to be a part of the Market Intelligence:</p> <ul style="list-style-type: none"> <li>- People Moves</li> <li>- Tracking of important companies that are target audience</li> <li>- Competitor analysis and updates</li> <li>- Partnerships &amp; JVs in the Finance vertical in USA</li> <li>- Latest trends</li> <li>- News</li> <li>- Events &amp; Conferences</li> <li>- Organizations &amp; Communities in Finance</li> </ul>
<p><b>Fixing meetings with prospects</b></p>	<p>The Sales support team was required to follow up on leads and fix Telecons, Phone or Face to Face meetings for the Sales persons.</p>

<b>Marketing Material</b>	The Sales support team would build all the required marketing materials such as presentations, emails, collaterals, brochures, case studies, proposals to support the Sales in successful closing of deals.
<b>Lead Generation</b>	The Sales support team would execute email campaigns and all subsequent follow up campaigns to generate leads.
<b>Website Maintenance</b>	Maintain the website and implement SEO.

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## 2.2 BUZZ MARKETING

The sales support team would execute email campaigns for creating a buzz about the financial portal. The campaigns would be customized according to the target audiences and required management of extremely huge amount of Databases.

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## 2.3 CREATING A TEAM

The biggest challenge was to create a team of people with the right combination of skills and talent required to ensure the rapid implementation of the sales support activities which would drive the Sales effort and consequently generate revenue for the company.

# SECTION 3 – THE SOLUTION : STEP BY STEP APPROACH

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## 3.1 TEAM SETUP

The professional from iLeadFarmers joined first. The first 3 months were spent on setting up the processes which included:  
 Setting up Salesforce for the management of the Databases that would be built by the team  
 Setting up the emailing process through sales force which was identified as a crucial tool for lead generation and buzz marketing of the portal.  
 Setting up the process for mining data from the internet and accumulating it in Databases (excel format), Salesforce, MS PowerPoint and Word.  
 The process of maintaining the data mined from the internet and keeping it updated.

Creating presentations, marketing collaterals, brochures, case studies, proposal templates etc..

The team members were hired after the setup was done and the roll out was implemented immediately.

### 3.2 SUPPORTING THE SALES PROFESSIONALS IN BOSTON

Support activities	
<b>Researching &amp; tracking Target audience</b>	<p>Google alerts were implemented for the following key words:</p> <p>Mutual Funds, Hedge Funds, Venture Capital, Private Equity, Investment Banking, Wealth Management and Emerging Markets.</p> <p>List of new sites hosting information on the above sectors were identified and RSS feeds implemented.</p> <p>Intensive research was done on these sectors to identify the potential companies, the departments within them, the target audience within them, the profiling for the companies and the professionals that are the target audience was done.</p> <p>The target companies, people and these sectors were monitored daily for Marketing Intelligence.</p>

<p><b>Creating the Databases &amp; maintenance</b></p>	<p>Databases were build rapidly for the following sectors:</p> <p>Mutual Funds, Hedge Funds, Venture Capital, Private Equity, Investment Banking, Wealth Management and Emerging Markets.</p> <p>The Databases were built in excel sheets and consisted of the names and contact details such as email, phone number, title, profile info, department etc...) for the target audience:</p> <p>CEOs, Portfolio Managers, Managing Directors, CTOs, COOs.</p> <p>These excel Databases were than imported into Salesforce for the email campaigns and for maintenance.</p> <p>The data was mined from organic searches, Google alerts, News sites, People moves sites and RSS feeds.</p>
<p><b>Market Intelligence</b></p>	<p>The team built and maintained the Market Intelligence to keep the Sales team updated with the latest market information:</p> <ul style="list-style-type: none"> <li>- People Moves were tracked from a list of select websites. The team monitored these websites and updated the relevant information in the Databases.</li> <li>- Tracking of important companies that are target audience was done by the team.</li> <li>- Competitor analysis and updates were done through research and Google Alerts.</li> <li>- The team monitored the internet for information on Partnerships &amp; JVs in the Finance vertical in USA</li> <li>- Latest trends &amp; news were compiled and provided to the Sales team.</li> <li>- Events &amp; Conferences, attendees, members were recorded and the important Events/Conferences were recommended to the Sales team to attend.</li> <li>- A list of important and influential Organizations &amp; Communities in Finance was submitted to the Sales team to join.</li> </ul>

<p><b>Profiling</b></p>	<p>An important of task of the Sales Support team was to profile important companies and the professionals to be targeted in them.</p> <p>The team created PowerPoint presentations with the department structure, hierarchy, company and department profiles, person profiles, person contact details.</p> <p>The profiling was detailed and consisted of the latest news of the company.</p> <p>The profiling helped the sales people to contact the right people, have productive meetings with the executive team members of top Finance companies.</p> <p>This gave the Sales team a complete picture of the target company. They could arrive at the right value proposition and gave them the confidence while presenting the value proposition.</p>
<p><b>Marketing Material</b></p>	<p>The Sales Support team created a library of presentations, marketing collaterals, brochures, case studies, proposal templates etc.. to support the Boston Sales team.</p>
<p><b>Email campaigns &amp; follow ups</b></p>	<p>One of the major tasks of the Sales Support team was executing the email campaigns customized according to the target audience.</p> <p>The teams email campaign strategy was to send customized emails with value proposition suiting the target company and the profile of the recipient. This involved research and good writing skills to ensure a high response rate.</p>
<p><b>Fixing meetings with prospects</b></p>	<p>The Sales Support team in India responded to the leads generated through the email &amp; telecalling campaigns and fixed meetings with the Sales persons.</p>

<b>Website Maintenance &amp; SEO</b>	<p>The Sales Support team was in charge of the website.</p> <p>The team worked on the website content while paying attention to the keywords. The SEO was implemented for the website.</p> <p>The website updates such as news, content, new page additions were looked after by the sales support team in India.</p>
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### 3.3 BUZZ MARKETING FOR THE PORTAL

It was crucial to identify a strategy that would be the fastest means of reaching out to the target audience in a short interval of time.

The Sales Support team planned and executed the email campaigns reaching out to CEOs, Portfolio Managers, Managing Directors, CTOs, COOs in sectors such as Mutual Funds, Hedge Funds, Venture Capital, Private Equity, Investment Banking, Wealth Management and Emerging Markets.

The idea was to create a buzz about the portal and through it promote the company and create possibilities of pitching services for BPA.

## SECTION 4 – RESULTS & MAPPING

The portal was very well received and got registration from very big Financial institutions.

The company was able to sign long term partnerships with companies such as Morgan Stanley, Merrill Lynch for Business Process Automation.

The profiling done helped immensely in cross selling & upselling.

The Sales support team was able to collect 30,000 contacts in just 6 months which was a compilation of top people in the finance vertical in the USA.

The high quality research ensured that the Sales people met the right people in the industry due to which the time taken for deal closure was reduced considerably.

The information provided by the team helped the Sales professional to have positive meetings with the target audience promoting the right image for the company.

## SECTION 5 – TOOLS USED

Google Analytics & Statcounter to map the hits of the website to the email campaigns.

Salesforce, CRM to maintain the target audience information.

## SECTION 6 – CONTACT INFORMATION

We are located at Pune, INDIA

Please visit our website [www.ileadfarmers.com](http://www.ileadfarmers.com) to know more about us

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