



Cloud Consulting Firm's Sales Outlook Drifts Higher with Callbox

THE CLIENT



INDUSTRY

IT Consulting and Software Applications



LOCATION

York, PA



HEADQUARTERS

York, PA



CAMPAIGN TYPE

Lead Generation



TARGET LOCATION

York, PA

ABOUT

The Client provides industry-specific implementation, training, and consulting services for Microsoft Dynamics AX and Microsoft Dynamics CRM. Its target accounts include medium- to large-sized business in North America and the Caribbean. The Client is a Microsoft Cloud Solution Provider and a Microsoft Gold-Certified Partner.

TARGET INDUSTRY

- Manufacturing
- Distribution
- Professional Services
- Microsoft Dynamic Users

THE CHALLENGE

The Client's core mission is to help companies implement and optimize Microsoft Dynamics AX and CRM applications. It sells its services primarily to large- and mid-sized businesses in verticals such as distribution, manufacturing, and professional services.

The company recently refocused its marketing initiatives toward growing the customer base for its three industry-specific modules: industrial, professional services, and AX users. Part of its new customer acquisition strategy called for targeting prospects throughout the U.S via outbound channels.

Being a small company (with only 35 employees), the Client clearly needed some outside help carrying out many of its marketing activities. Past experience has taught the company that its small team of in-house

sales reps was best deployed following up qualified leads and nurturing opportunities, instead of spending a great deal of their time prospecting.

Once the company finalized its requirements, the Client began looking for a potential outsourcing partner that could:

1. Identify accounts that fit the target customer profile for each of the Client's three modules
2. Qualify contacts for each identified account by gauging purchase intent and solution fit
3. Collect additional prospect information to be used by its in-house reps

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CASE STUDY
CLOUD CONSULTING FIRM'S SALES OUTLOOK DRIFTS HIGHER WITH CALLBOX

HIGHLIGHTS

- Completed a 6-month US-wide appointment setting project for a leading enterprise cloud consulting firm
- Generated high-value sales appointments for conversion within the next 12 months
- Increased prospect quantity and quality by combining phone calls with emails and social media

RESULTS WITHIN SIX MONTHS



21 Qualified Appointments



8 Completed Leads



262 For Follow-Ups



3 Requests for Information

THE CALLBOX SOLUTION

The Client chose Callbox at the suggestion of one of its partner IT companies. The Client pointed out that Callbox's marketing experience in the enterprise cloud space was a deciding factor.

Callbox then put together a 6-month appointment setting program consisting of six monthly campaigns. Each campaign focused on a specific segment for the company's three main modules. The entire project made use of live phone outreach integrated with email and social media activities.



Appointment Setting

1. Callbox compiled the list of target prospects from companies that meet the Client's requirements for industry, location, and annual sales.
2. Contacts whose organizations are currently evaluating their ERP or CRM software and are looking to acquire a new platform within the next 12 months are tagged as qualified prospects (qualified appointments or completed leads).
3. Probing questions for solution fit uncover information on software usage, business pain points, buyer role, etc.

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SALES & MARKETING SOLUTIONS

THE CALLBOX SOLUTION



Email Marketing

1. The Callbox team used emails for warming up/nurturing prospects and for distributing Client materials.
2. Callbox's SMART Calling technology prioritizes calls based on time and frequency of email opens, clicks, and replies.
3. Callbox also prepared and optimized all email marketing collaterals (templates, landing pages, etc.) used in the campaign.



Social Media

1. The Callbox team nurtured positive contacts further by connecting with them on LinkedIn.
2. The campaign's social media specialists used LinkedIn to collect and verify prospect data, as well as to generate additional leads.
3. The team also leveraged LinkedIn to boost the company's online presence by joining and participating in relevant groups.

RESULTS

The six campaigns ran for a total of six months. In each of the campaigns, a good part of the first half was spent warming up prospects and doing research. This meant that much of the initial campaign activities focused on email marketing and social media. For the entire project, emails and LinkedIn produced the following results:

- **Email delivery rate:** 99.4%
- **Email open rate:** Up to 38.3%
- **Email reply rate:** Up to 5.13%
- **LinkedIn connections:** 1,492
- **LinkedIn groups:** 144
- **LinkedIn leads:** 6

Live conversations with prospects generated the following results:

- **21 qualified appointments**
- **2 completed leads**

Most of these results were recorded during the closing stages of each campaign. The Client says that all 21 appointments meet their sales criteria, so they expect to convert around half (or 11) of these prospects within the next 6 to 12 months.

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