

How a Financial Firm Generated 84% Increase in Sales-Ready Leads

THE CLIENT

The Client* is a leading provider of financial solutions to businesses based in Seattle. Their range of services varies from insurance, investment opportunities, risk management, wealth management and asset management solutions.

Their comprehensive financial solutions have generated clients worldwide. Their strength lies in the fact that their services are highly customized and are also provided online.

THE CHALLENGE

The company had a huge number of prospect base that were just getting piled up year on year. Although they were receiving sign-ups and leads; they were eventually seeing a steady decline in the number of fresh leads as the months passed by.

They also identified that their prospect management system was not as systemized as it needed to be. The result was - their marketing campaigns were not as targeted as they needed to be. Apparently, most of the sales messages were not reaching the right cross-section of customers.

It was not feasible for the client to dedicate a substantial amount of time and resources for end-to-end lead nurturing campaigns. Leadsberry's marketing automation platform helped the client to put a proper lead management campaign in place that in turn took care of their marketing campaigns very well.



*Due to confidentiality reasons, the name of The Client has been withheld.



THE SOLUTION

On signing up with Leadsberry's, the client was given access to the automated lead management system. The platform is so flexible that it was customized to their needs and was able to identify the high-performing leads that were most likely to convert.

Leadsberry's marketing automation system identified the huge number of leads that were inactive, low-quality and were not converting at all. An initial check by the tool also found that these huge numbers of leads were not segmented into proper categories.

Leadsberry's dynamic platform effectively plucked out each and every lead and categorized them into various buying stages based on their behavior and action. The primary objective was to set up a lead nurturing process that will convert fresh, new leads into sales-ready prospects. The tool formulated a multi-step nurturing course that followed leads along their buying path, tracking the leads and their actions.

Further, the automation system was proactive in addressing the buying stages and the lead's buying behaviors. The leads that were in the pipeline for a long time were kept aside for further nurturing. The ones that were interested in the client's services were moved up in the sales funnel. Leadsberry's lead automation interface also followed a rigorous lead scoring system that assigned points to each prospects as per to their attributes.

Finally, the robust lead analytics system helped track, analyze, measure and report the lead's behavior, their clicks and open-rates of the messages.

Within a couple of months of systematic tracking and lead analysis, the client could finally see an upward movement in their sales graph. This was possible as the marketing campaigns became niche and the right type of leads was followed for right kind of services.

The end result was an increase in client's prospect response to 84% from a mere 36%

Here is what the Client's VP Marketing, Mark Gilbert had to say:

It was absolutely amazing how Leadsberry's lead management tool improved our lead quality in just a couple of months. It managed our prospects from scratch which we badly needed. The tool was quick, completely automated, and extremely easy-to-use and worth every dollar spent. I am looking forward to use more of this tool for our business.