

CBI-X Delivers Success to Case Management Software Leader with ABM Lead Generation and Appointment Setting Campaign



THE CLIENT

Established in 2003, the Client has positioned itself as a leader in providing case management software solutions, having more than ten years of experience. Several federal, state, and local organizations in the USA avail of their services, which comprises an intuitive web-based case management and tracking system that is also easy to use. Their software has become widely used and trusted among organizations involved in investigations.

 INDUSTRY	Software
 LOCATION	USA
 HEADQUARTERS	USA

 CAMPAIGN TYPE	Lead Generation, Appointment Setting
 TARGET INDUSTRIES	Municipal organizations
 TARGET LOCATIONS	Across the USA
 TARGET DECISION MAKERS	Mayors, Municipal Commissioners, IT Director, IT Manager, IT Consultant

HIGHLIGHTS

- ✓ Successfully deployed a 6-month Appointment Setting campaign for a leading case management software expert
- ✓ Planned and conducted outbound campaign activities that created more opportunities for the Client to reach more potential customers
- ✓ Completed several key objectives, from searching for accounts that best matched the Client's criteria to delivering the target number of highly qualified prospects

CHALLENGE

The Client found great success with its case management software initially, attracting numerous customers, earning them spots in the top 500 fastest growing startups for five straight years. However, changes in the market and developments in the field brought them intensified competition, and they soon realized that their traditional customer engagement methods could not give them the same results.

To mitigate the possible effects of stronger market competition on their business metrics such as customer acquisition, customer retention, and ROI, the Client decided to reach out to an outside agency to perform some of its marketing functions. At the end of their deliberations, the Client made the best choice in engaging with CBI-X.

RESULTS IN 6 MONTHS

58
total face to face
appointments

64
go-to meetings

90
follow-ups

110
requested for more
information

580
new social media
connections

THE CBI-X SOLUTION

After studying the Client's case, the CBI-X team chose to design and launch an account-based management lead generation and appointment setting campaign. This campaign followed three work phases:

Account Research & Selection

1. The Client targeted municipalities that were currently evaluating case management software providers, or at least were willing to evaluate within six months. These municipalities must also already have a budget prepared, or were willing to receive pricing proposals.
2. The Client then narrowed down these specific details of their target accounts into prospects who showed a need to upgrade current software, or a need to purchase a newer application.
3. CBI-X compiled the list of target accounts using its in-house database.

Account & Prospect Profiling

1. CBI-X studied and profiled their prospects from their account list. They identified these key decision makers: Mayors, Municipal Commissioners, IT Directors, IT Managers, and IT Consultants.
2. From these decision makers, the CBI-X team also made a list of qualified accounts that showed a need to avail of a case management software, and that had a budget for it
3. CBI-X submitted their list of profiled records to the Client for approval.

Comprehensive Outreach

1. CBI-X contacted the prospective buyers who passed their requirements for need, evaluation and purchase timeframe (6 months), and budget.
2. CBI-X also nurtured these qualified prospects through a variety of channels, including phone, email, and LinkedIn for maximum engagement and response rates.
3. CBI-X also carried out multiple touches for each of their nurture paths set for every qualified prospect. To achieve optimum results, they combined automated engagement and one-on-one interactions.

RESULTS

After the two-term ABM lead generation and appointment setting campaign, the CBI-X team delivered great results to the Client. Their team delivered 58 total face to face appointments, and 64 go-to meetings. 110 prospects requested more information about the Client. They also made 90 follow-ups and created 580 new social media connections through LinkedIn.

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