RelPro®

Connecting to the C-Suite to Elevate Strategic Dialog & Support Monthly Product Launches

RelPro's leading data quality, coverage, Financial Services expertise & relationship mapping capabilities build connections for strategic discussions & new product sales

CLIENT

Global Fintech Leader
Solutions & infrastructure provider to global financial markets with ambitious product launch plans
Chief Revenue Officer, CMO, Head of Sales, Marketing & Sales Operations in the Americas and Europe

TARGET

C-Suite & Business Heads Across Target Customer Companies, in the Americas & Europe:
1. C-level & Senior Management
2. Trading, Research & Portfolio Managers in specialized Fixed Income, Equity, Commodity & Currency markets

RELPRO DELIVERED

Contact details for C-Suite executives at 400 targeted key accounts

Highly-curated prospect lists for monthly new product launches, produced as an outsourced team (3,000 leads per campaign)

Relationship-mapping to show connections between the executive team & target companies

Ongoing alerts for account managers to keep them up-to-date with target executives

Regular onboarding & training sessions for Marketing & Sales

Deep Financial Services industry knowledge & domain expertise to meet client's highly-customized requirements

CHALLENGE

Dramatic changes in the world's financial markets post-2008 created opportunities for our client to launch new data-driven solutions for highly-specialized market players. However, to capitalize on this opportunity, four things needed to happen:

1. A shift in strategy from product focus to solution selling
2. Conversations elevated from current counterparts to senior-level managers with authority for high-value procurement
3. Rapid new product launches in quick succession
4. Establish new connections with customers in trading, risk and research roles, who our client had not previously contacted.

The data in our client's CRM didn't have information on these new customer contacts – in the C-Suite or in specialized roles. Without the capability or capacity to take this on internally, our client outsourced this project to RelPro for accelerated access to the relationship intelligence they needed.

SOLUTION

We put our team of relationship intelligence experts with decades of Financial Services experience on this project. They skillfully and speedily built a practical toolkit of relationship data exactly to our client's specifications.

We provided contact details on C-Suite executives at 400 targeted global financial institutions. Our team also put their expertise into developing multiple, highly-curated lists of specialized market practitioners at customer companies. The list of roles included derivative traders, risk specialists, compliance, information security and financial control professionals relevant to these new data solutions.

Our client's target audience was very well defined, but many of the keywords within the target roles had the potential to deliver "false positives". To eliminate contacts that didn't belong in our client's sales & marketing campaigns, we applied our deep Financial Services industry expertise through an additional layer of scrutiny to eliminate potential prospects who looked right but didn't fully meet the criteria. We then worked with our client to deploy the list to the sales team through their CRM and Marketing Automation platforms.

It's not always "what you know" but "who you know" that gains the attention of prospects in top management. To reveal valuable ways of connecting and building relationships with these prospects, we recommended incorporating a relationship-mapping solution to our client for this project. The relationship map helped guide the executive team as they made their action plans and resulted in "warm openings" instead of "cold calls".

THE RELPRO ADVANTAGE

1. Fulfilled our client's exacting specification for target prospects by putting our Financial Services industry knowledge & domain expertise to work

2. Cut email campaign bounce rate by 50%, against the previous data provider – the bounce rate using RelPro data never rose above single-digits

3. Helped our client successfully execute their rapid-fire launch plan for new products; completed the full-year's campaign plan in 6 months as results were so successful

4. **Gave our client the tools for an easy transition** to their new sales & account management strategy; delivered time-saving sales intelligence to salespeople to quickly identify new leads & better prepare for sales calls

RESULT

The lists - highly-refined for the C-Suite and specialized to the targeted financial market roles - enabled our client to "elevate the conversation" and launch a new, successful data solutions business.

Our clients opened new, productive doors since they had the right targets and the right messages, turning contacts into advocates and resulting in new business.

Our client successfully and smoothly achieved their strategic shift and effectively transitioned to strategic account management, the wisdom of their vision underscored by their improved financial performance. This company is now recognized as an innovator and market leader in the competitive Fintech world.

We're immensely proud of our contribution to their results:

1. Maximized contact, with nearly 90+% deliverability for emails and telephone numbers

2. Account management team fully networked into the relationship intelligence platform

3. This year's campaign calendar delivered within 6 months

We continue to support our client's active new product launch schedule – more RelPro-based campaigns are in the works!