

Financial Services client – Case Summary

Lead generation for financial services company



Illustrative screen shots

Solution objective

- Generate leads for provider of retirement benefits management, consulting and advisory services

Target audience

- SMB business owners and general managers
- Benefits managers within these companies

Deployment strategy

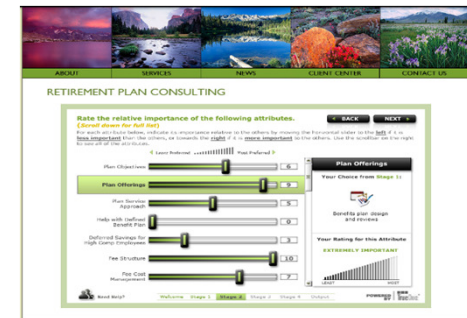
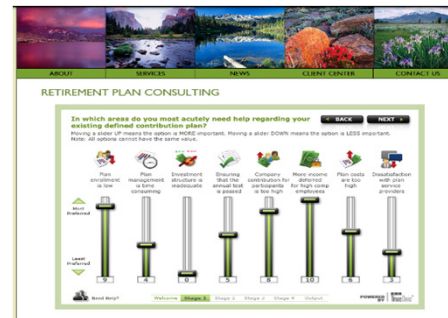
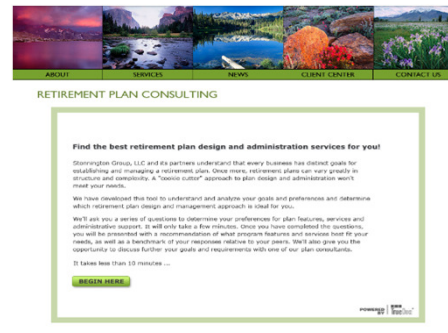
- URL access and also imbedded in client 's Website
- Respondents solicited via e-mail campaigns
- Custom lead profiles integrated into client's sales management system

Analytics

- Detailed preference profiles pushed to benefits consultants for more informed sales prospecting
- Customer segmentation by size of business, business type (e.g., for- versus non-profit), retirement plan type, etc.
- Vendor satisfaction score – competitive vulnerability

Results / impact

- Detailed, timely lead intelligence, contact info pushed to client sales reps for follow-up



TrueChoice Predictive Selling™

Real-time customer insights with instant sales impact

What is TrueChoice?

- ✓ Customized Software-as-a-Service that enables 'Predictive Selling'.
- ✓ Best practice technology measures 'how' individual customers make decisions, understand needs and buyer values, willingness-to-pay and purchase drivers.
- ✓ Powerful analytics and decision support in real-time.
- ✓ Everybody wins: Customer, Sales and Company.
- ✓ De-risks decisions through reliable, actionable insights for account management, sales optimization, solution selling, product Strategy and pricing.
- ✓ Based on 460+ patented algorithms, fully customized.

Track-record: Measurable ROI

	Increase in revenue per customer	+ 27.3%
	Increased conversion rate	+ 104.5%
	Revenue from existing accounts	+ 18.2%

	Decrease in selling expenses	- 21.8%
	Cost savings from research	3 to 5x
	Cost per lead	- 61.5%

Better customer experience

- Easy-to-use, fast, educational
- Email, website, mobile, sales rep, call center, etc.



Scalable sales optimization

- Lead generation; more and higher quality leads
- Account optimization, lead prioritization, 1:1 insights



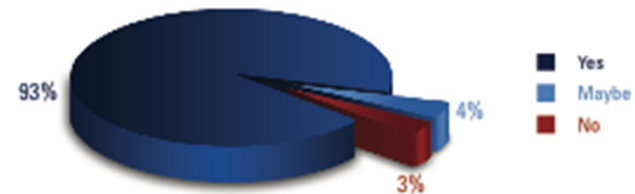
Actionable customer insights

- Real-time insights via 120 metrics
- Strategy, sales, pricing, supply chain, segmentation, etc.



Better customer experience in B2B and B2C

"Adds real value, is educational & helps me make better decisions."



- 87-93% completion rate (without incentive)
- Personalized experience, optimized individual content and recommendations, 'at my pace'
- 89% feel that tool builds "trusted advisor" relationship