



Tax Credit Expert, Boosting with Leads and Connections with Callbox ABM Lead Generation

THE CLIENT



INDUSTRY
Financial



LOCATION
New Jersey,
USA



HEADQUARTERS
Massachusetts,
USA

ABOUT

The Client is a 30-year old specialized business consulting firm that offers expertise and advisory services regarding federal and state research and development tax credits to manufacturing and technology companies.



CAMPAIGN TYPE
Lead Generation
& Appointment
Setting



TARGET INDUSTRY
Manufacturing and
Technology Companies

TARGET LOCATIONS

CT, MA, RI, VT, NH, ME, NY, NJ, PA

TARGET DECISION MAKERS

Finance Manager/Director, Accounts Manager, Financial Controller, Managing Director, C-suite, Accountant, Business Owner

THE CHALLENGE

With a database full of contacts which they have gained and continue to nurture for more than three decades now, the Client decided to look for an outbound lead generation provider who could help them acquire new leads so that they can focus on nurturing existing customers and manage phone meetings with target prospects.

HIGHLIGHTS

- Successfully launched a lead generation and appointment setting campaign for a leading business consulting firm.
- Worked out multiple outbound activities that opened opportunities for the Client to engage new sets of target buyers and connect with target customers online.
- Reached key objectives in terms of best-fit accounts and highly-qualified prospects delivered

RESULTS



32 **Appointments Set**



1 **Marketing-Qualified Lead**



1 **For Callback**



23 **Potential Leads**



2,449 **Social Media Connections**

THE CALLBOX SOLUTION

Callbox designed an Account-Based Marketing Lead Generation & Appointment Setting campaign for the Client which consisted of:

- Account-Based Multi-Channel Lead Management via voice, email, chat, social media and mobile.
- Sales Enablement & Support which includes training, setup and back office sales support.
- Tools & Subscriptions utilization of Callbox Pipeline and HubSpot CRMs.
- Account Management including strategy building, reporting and product knowledge.

The goal was for the Callbox team to generate meetings for the Client with interested prospects via multiple channels, and build connections with prospects online via social media marketing.

The campaign involved two key steps:



Account Research and Selection

1. The Client specified target industries and decision makers.
2. Callbox worked out the Client's ideal customer profile (ICP) which served as a basis for identifying qualified accounts.
3. Callbox then compiled a list of potential contacts to target, which was reviewed and approved by the Client.



Account and Prospect Profiling

1. The Client provided target decision makers for the Callbox team to reach out which consisted of detailed demographic and firmographic segmentations.
2. The buyer personas designated as the campaign's primary targets were Finance Manager/Director, Accounts Manager, Financial Controller, Managing Director, C-suite, Accountant, Business Owner
3. The master contact list was segmented based on these personas, and was further grouped according to industry type.

RESULTS

The ABM Lead Generation and Appointment Setting campaign campaign has been running for just more than a month, but the Client is very pleased with the first month's results as well as the Callbox team's engagement which delivered 32 Sales Appointments, 1 Marketing Qualified Lead, 1 For Callback, 23 Potential Leads and 2,449 Social Media Connections.

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