

How This One Financial Services Firm Generated Over 54 Leads, 26 Booked Appointments, 17 SQLs, and 7 Proposals in 114 Days Using This Omni-Channel Marketing Strategy

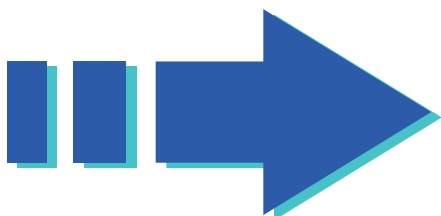
The Problem

Occams Advisory is a financial services firm. They serve as a one-stop-shop for business, financial, and professional services for small and medium-sized businesses (SMBs). As a trusted advisor and growth partner, they support their clients throughout the entire business lifecycle. They provide expert services across three verticals: Business Services & Growth Incubation, Capital Markets & Investment Banking, and Financial Technology & Payment Solutions.

Previously, they had been doing some cold outreach (calling and emails) but were not achieving the results they had hoped. Their customers had a deadline to claim ERC retention credits and they needed to get their message out to their target audience before time ran out.

Occams Advisory realized that they needed to bring on a team that specializes in a specific type of outreach strategy in order for their efforts to be successful. They also knew that they needed the additional manpower and a proven, comprehensive system to reach out to the right prospects but they just didn't have the time or expertise to do it on their own.

That's when they reached out to LinkedSelling.



Their Target Market

Before we determine the exact strategy that we will use for this campaign, we first have to dive deep into the types of people that we will be targeting. In this instance, all industries (except for other financial service firms) were fair game.

Together, we decided to target the following job titles within companies with 2–500 employees:

- Owner
- President
- CEO
- COO
- CFO
- Controller
- VP of Finance

"We are happy with the results so far. We've been getting great leads and having great opportunities. You've done your half of the arrangement so now it's on us to get these SQLs closed and get them across the finish line. That's a big focus point for me right now. Get these big ones closed so that way we can point to that and say to leadership, look what this investment has got us so far... what if we ramp this up, what if we 2x the volume or even add another channel to the mix."

- Josh Westfall, Chief Revenue Officer

The Solution

After identifying Occams Advisory's target audience, we realized another challenge: this market was extremely crowded. Business owners and CEOs were constantly getting bombarded with messaging about ERC and many became weary about applying because of the amount of misinformation that was out there.

We needed a message that was different than what everyone else was sending out. With that in mind, we created an outbound sales development machine using our proprietary messaging playbook to craft scripts for LinkedIn messages, emails, and phone calls that focused specifically on the pain points that the prospects were experiencing. We also included language that defused the objectings that we knew that we would eventually receive.

Our messaging strategy focused on a Pain, Pain, Offer, Social Proof, and Call to Action approach.

The best part about this strategy? We're able to deliver one comprehensive message to qualified prospects through this method. On Occams Advisory's behalf, we sent out these messages and made calls throughout the week, urging prospects to book a call with their team.

The Results

In less than 4 months, this strategy generated 221 appointments. At the time of writing, 17 appointments had already taken place with 11 of them being SQLs. Out of the SQLs, 7 of them resulted in a proposal being sent. Just in time for them to file for ERC.

Within LinkedSelling, we make sure to focus on positioning our client as a trusted resource in their industry, which attracts a lot of conversations on LinkedIn and opens the door for sales teams.

For Occams Advisory, the number of leads that this campaign generated provides them with the potential for additional revenue as they continue their outreach efforts into the future.



About Occams Advisory

Industry: Business Consulting and Services

Location: Sarasota, FL

View Company Website: <https://www.occamsadvisory.com/>

Think We Can Help?

Let's Chat to See How We Can Help Generate
Quality Appointments for Your Business!