Lead Generation – Case Summary

Lead generation for financial services company

TrueChoice SOLUTIONS INC. ®

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
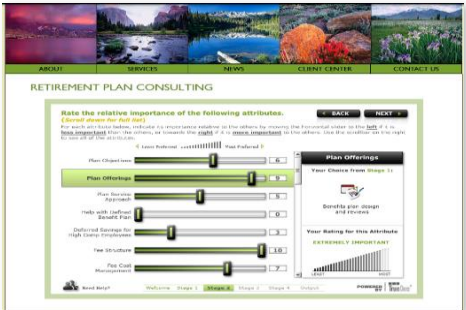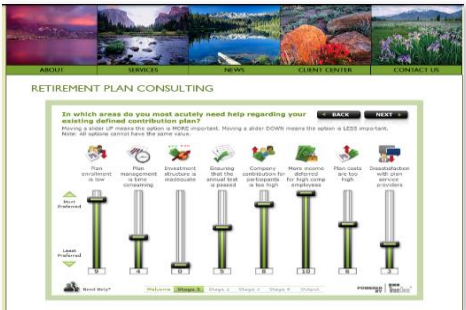
Analytics

- Detailed preference profiles 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 profiles; contact info pushed to client sales reps to facilitate follow-up with prospects

Illustrative screen shots

TrueChoice Lead Generation

Real-time customer insights with instant sales impact

TrueChoice SOLUTIONS INC. ®

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

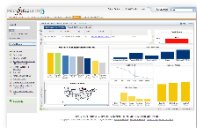|	
Increase in revenue per customer	**+ 27.3%**
Increased conversion rate	**+ 104.5%**
Revenue from existing accounts	**+ 18.2%**
Decrease in selling expenses	**- 21.8%**
Cost savings from research	**3 to 5x**
Cost per lead	**- 61.5%**

Better customer experience

- Easy-to-use, fast, educational, personalized
- 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
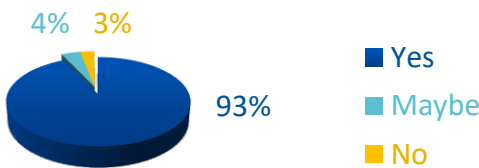- Strategy, sales, pricing, supply chain, segmentation, etc.

Better customer experience in B2B and B2C

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

4%   3%

93%

- ■ Yes
- ■ Maybe
- ■ No

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