

Unity Trust

Background

Unity Trust is a bank that specialises in serving the charitable sector. They are seeking telemarketing support their sales pipeline and allow their nationwide Business Development Teams to focus on the latter stages cycle where their valuable time is best focused.

Case Study 3 Sales pipeline development

The Task

To generate qualified leads for the Business Development Teams of Unity Trust bank using data supplied by the client.

The Challenge

Data was garnered from a number of sources but is often limited in its content, consisting of charity name and phone number. From this 121 have created a pipeline of qualified leads.

The 121 Solution

121 broke the campaign into four stages. The first stage involves contacting the charity and confirming the identity of the decision maker with responsibility for banking arrangements within the organisation.

At the second stage we write to the decision makers on behalf of Unity Trust highlighting the service Unity offers and their specialism in the charitable sector.

The third stage integrates our telemarketing expertise. We contact each of the decision makers and explore their knowledge of Unity Trust and understand their satisfaction with their current banking arrangements. The benefits of this approach are twofold, raising the brand awareness of Unity Trust in the sector in which they specialise and garnering new business opportunities.

The fourth and final stage is to set an appointment for the bank's representative, should this be of interest and relevance to the targeted charity. Dates and times are confirmed directly with each member of the bank's Business Development teams.

The Result

121 has generated a steady flow of new business opportunity for Unity Trust. Our early results show a 21% appointment rate and a 59% willingness to talk again in the future (80% positive outcomes!). Unity are so pleased with the early results that they have chosen to extend the campaign.