

**THE FALCONRY GROUP**  
— PREDICTABLE • PROFITABLE • REVENUE —

# Client Case Study

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# Problem, Solution, Results

## Problem

- ✓ Outdated website lacking buyer-persona-specific messaging, positioning, and offers
- ✓ Lack of organized lead gen and pipeline management focus, creating inconsistent revenue and slow/no growth over 5 years.

## Solution

- ✓ Research and develop a complete “marketing and sales playbook” including detailed guidance for buyer-specific messaging and content offers, website organization, and sales lead generation and management
- ✓ CRM and Marketing Automation vendor evaluation, selection, and implementation

## Results

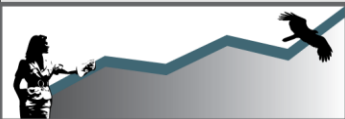
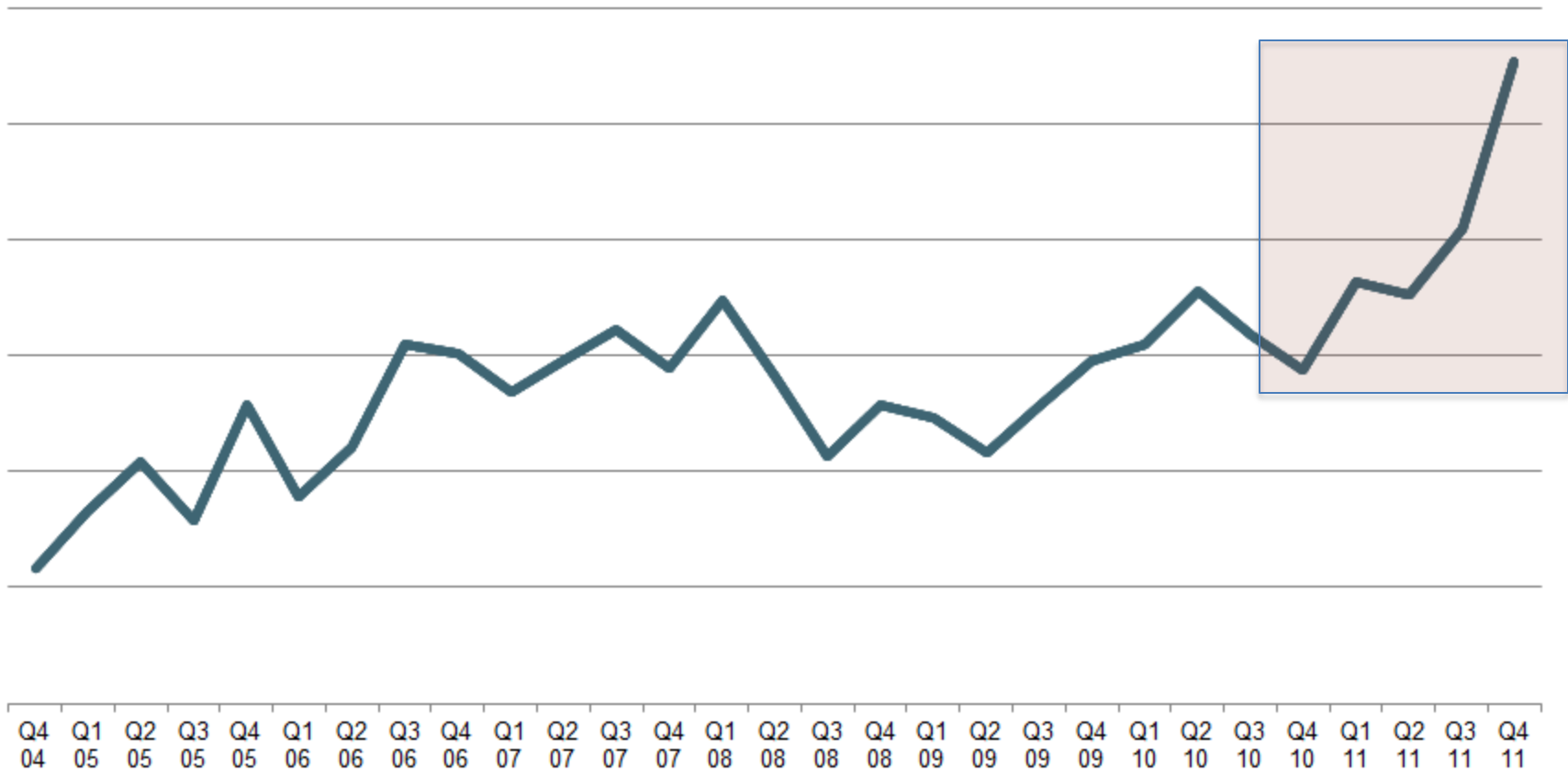
- ✓ Established new sales process and lead gen programs
- ✓ 82% revenue growth over 5 quarters, expand mgmt team, new offices



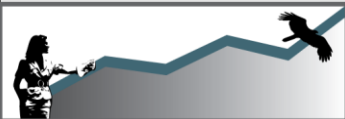
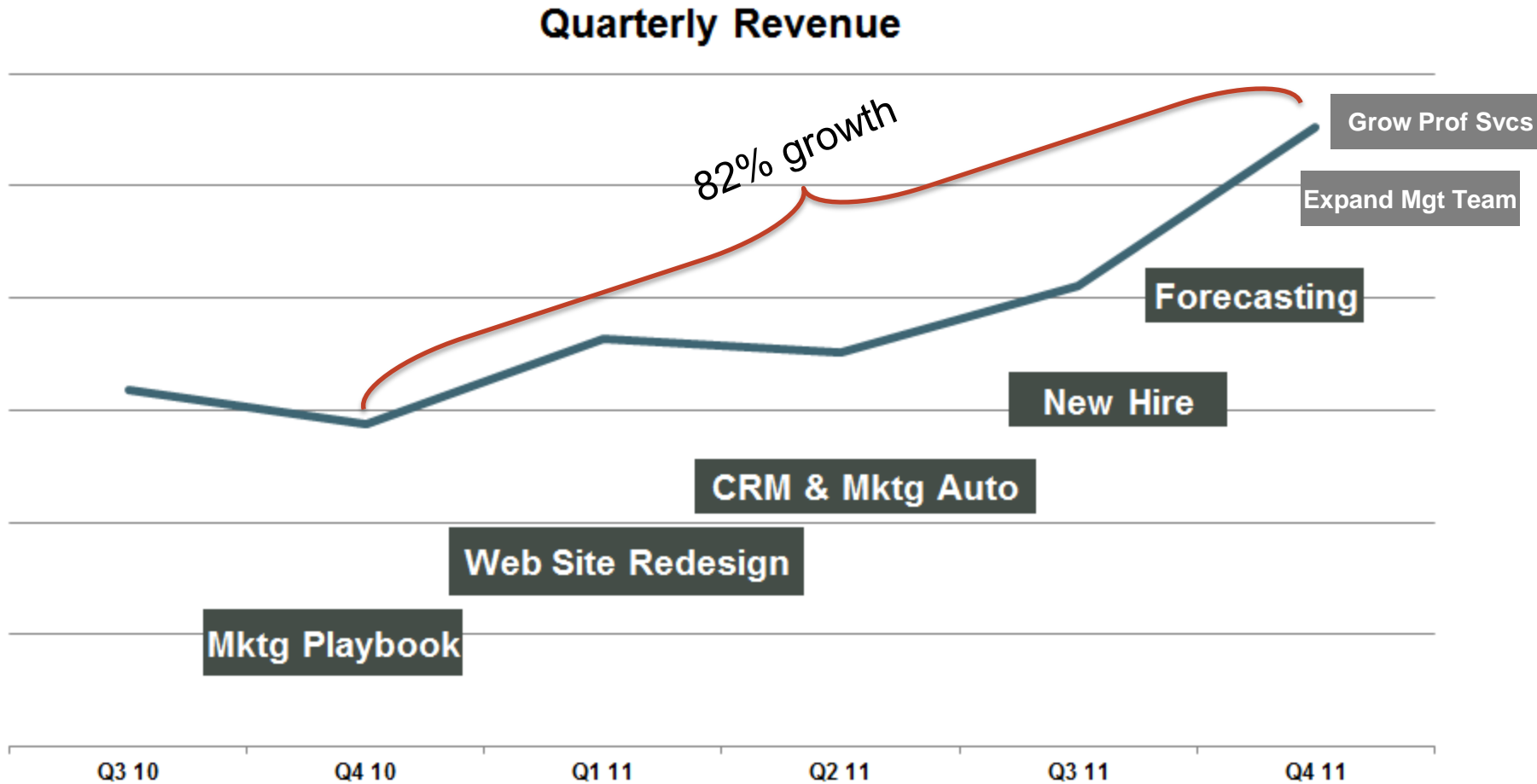
# Client Case Study: 30-person professional services firm

## Quarterly Revenue

Engagement Period



# Case Study – Deliverables and Impact



# Case Study Deliverables - detail

Deliverable	Description
<b>Marketing Playbook</b>	<ul style="list-style-type: none"><li>• A strategic planning document (PowerPoint format) defining the right client (including buyer personas), the message, the media, the offers, and the overall buyer experience.</li><li>• An end-to-end lead generation plan including website direction, lead management process definition, recommendations for CRM and marketing automation, and an investment summary.</li></ul>
<b>Website Redesign</b>	<ul style="list-style-type: none"><li>• Briefing creative and technical resources using marketing playbook. Coordinating with vendors and internal staff (i.e., testing and bugfixes) to ensure successful integration of website into lead flow process.</li></ul>
<b>CRM and Marketing Automation</b>	<ul style="list-style-type: none"><li>• Working with vendors and internal resources to implement lead management process in CRM system (Salesforce.com), and configure email series (lead nurturing) in MA system (Net-Results).</li></ul>
<b>New Hire / Role Transition</b>	<ul style="list-style-type: none"><li>• On-boarding permanent marketing resource to assume ownership of demand generation infrastructure. Intros to vendors, etc.</li><li>• Mentoring, training, and support.</li><li>• Additional recommendations to client re: weekly sales meeting format, product catalog design, conversion rate optimization.</li></ul>
<b>Forecasting</b>	<ul style="list-style-type: none"><li>• Design and implementation of consolidated forecast process, including:<ul style="list-style-type: none"><li>• Integration of Accounting system data with Salesforce.com</li><li>• Workflow to include account manager forecast</li><li>• Visual dashboards in Salesforce.com</li><li>• Documentation and training</li></ul></li></ul>

