



Integrated Lead Management

Lead management is the process by which marketing acquires, evaluates, nurtures and hands off leads to the sales team. Integrated Lead Management weaves together a consistent message and contact strategies across all activities, leveraging each marketing channel's strengths to create a greater impact than each activity could achieve individually.

This ensures that every aspect of the customer's sales, marketing and service experience is designed from their perspective and engages them throughout the sales cycle.

As part of the CappcoPartners portfolio of services, we have developed a marketing optimisation system to guide firms through the process of revising their marketing plans, developing long-term campaigns, improving key aspects of their marketing programs and providing active help where needed during implementation.



Background

Many companies treat marketing as a separate activity rather than an integrated part of the business operation. As a result there are many examples where sales teams blame marketing for insufficient leads and chief executives complain that the marketing budget is not being used effectively.

This is often the result of insufficient alignment between sales and marketing priorities or marketing programs being insufficiently focused on the company's core growth opportunities. It can also be caused by the lack of clear data on the measurable value marketing provides.

For investors and senior managers, marketing it is a difficult and complex area to assess. It is even more difficult is to identify the key changes that need to be made to increase marketing effectiveness and productivity. However, once these key areas have been identified, it is often relatively straightforward to put corrective actions in place utilising existing resources and budgets.

The CappcoPartners Solution

Using tried and tested methodologies and tool kit, our specialist team has a proven track record of delivering measurable results. Our structured approach includes:

- We utilise a unique scorecard approach to measure the company's current process and ability to execute the marketing plan.
- We create a detailed plan where the objective is to demonstrate measurable revenue growth.
- We assist the company to repair the key issues discovered during the assessment process.
- We assist the company to execute lead generation and nurturing campaigns which drive measurable value.

Objectives

The objective is to give the investor and senior management a clear view of the company's current marketing strategy and to provide expert guidance to the marketing team on priority areas for optimisation and development. The idea is not to criticise the existing operation, but to work closely with the in-house marketing team to ensure they have a clear strategy and plan to achieve the rapid optimisation of all activities.

Focus is given to the business having a consistently deployed value proposition throughout all marketing programs, high-impact integrated multi-channel marketing campaigns, clear marketing channel strategies, and appropriate marketing automation and analytic tools. As well as working with the marketing team, the process involves sales and management executives in the company to ensure full alignment between sales, marketing and business strategy, KPIs, measurement and improvement processes.

The priorities of our involvement are a thorough marketing assessment and the creation of a 3 month marketing plan. For the assessment, over 100 data points are examined and scored based on the company's ability to execute and deliver the marketing plan. CappcoPartners are able to provide detailed campaign and content development and implementation support where required.



Marketing Assessment

The initial marketing assessment is based on the CappcoPartners “Growth Assessment Model” which is designed to assess the effectiveness of the marketing operation, with specific focus on the key areas that contribute to achieving the core objectives of the business:

- Lead Generation Performance; targeting, programs, databases, campaigns, lead pipeline, conversion rates and the ability to support revenue targets.
- Market Visibility Effectiveness; messaging consistency, brand clarity, promotion, PR, digital and traditional advertising and market impact relative to competitors.
- Website Productivity; desktop and mobile strategy, appearance, ease of navigation, customer journey, registration options, engaging content and SEO.
- Campaign Review; analyse results, lead generation, conversion rates, benchmark against industry standards, assess follow up and nurturing programs.

Marketing Plan

Once the initial assessment has been completed, a clear picture will have emerged of the strengths and weaknesses of current marketing activities. The assessment process will drive the creation of a revised marketing plan to include:

- High level lead generation program that supports revenue targets.
- Integrated messaging and campaign plans to align company positioning with key customer needs.
- Consistent campaign planning, implementation and tracking process.
- Recommendations for data cleaning and database building.
- Proposals for communicating value proposition to target market segments via key marketing channels.

Campaign Preparation

This requires careful preparation to repair the issues which arose from the assessment. This includes integrating all the elements, applying a long term messaging strategy and putting the customer at the centre of the entire process. CappcoPartners provide guidance as needed:

- Content Improvements; rework emails, landing pages, brochures, white papers, videos, webinars, press releases and sales presentations to make them more engaging and to increase response rates.
- SEO and Website Optimisation; makes content updates more frequent, improve user interactivity and increases lead generation performance.
- Data Consolidation; CRM data cleaning, prospect/customer segmentation and list enrichment.
- Social Media; create and implement a clear strategy segmented by channel. Clarify the purpose and priority of new content to maximise effectiveness.

Campaign Implementation

Getting this right is straightforward if sufficient energy is applied to the content preparation and detailed planning:

- Implementation Support; campaign deployment, social media strategy development, lead generation and nurturing programs and marketing automation tools.
- Continuous Improvement; careful analysis of lead generation, web analytics, search data and KPIs will highlight areas of greatest success and greatest concern.
- Alignment; involving sales and senior management in the review of plans, results, internal communications, marketing organisation and competitive issues.
- Business Strategy; identifying other aspects of the business where fine tuning and new thinking would ensure objectives are achieved in future.

Specialised Sales and Marketing Services

CappcoPartners is a company of experienced sales and marketing executives who specialise in improving sales and marketing performance and executing corporate turnarounds where revenue growth and creation is essential. The CappcoPartners team provide the following services:

Investor Services

- Pre-deal due diligence - our proprietary **“Growth Assessment Model”** assesses and measures the sales and marketing capabilities and gives detailed information relating to the target firms ability to deliver their growth plan.
- Assist under-performing portfolio companies - implement growth strategies by creating consistent sales and lead generation processes based on best practices.
- Post acquisition integration - we assist and project manage the integration of the sales and marketing departments and the creation of consistent processes across the company.
- Exit planning - we prepare our clients for the vendor due diligence process by fine-tuning their sales and marketing processes and capabilities.

Sales Performance Improvement

- Sales and Brand Strategy implementation - our **“Sales Performance Improvement”** process is designed to identify and exploit your key differentiated factors. We take a hands on approach to validating and then implementing your unique sales messages throughout all demand creation campaigns and marketing communications.
- Lead Generation - the objective is to increase revenue by improving the lead generation processes which will deliver additional high quality leads to the sales teams.
- Sales Process Implementation - we implement our **“Value Based Sales”** methodology during engagements which ensures accurate pipeline measurement and institutionalises sales best practice across the company.

About CappcoPartners

CappcoPartners was formed in 2009 to provide sales and marketing services to private equity and venture capital backed firms, struggling to meet their growth plans. We are staffed with experienced professionals who have successfully implemented positive change for small and mid-sized firms across all major industries. Each partner has a successful track record in implementing change and extensive experience in growing revenue.

Since 2009 CappcoPartners has successfully grown revenue by £75m for our clients and have added £300m in Enterprise Value to their investors. See our successes at www.cappcopartners.com



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