

Corporate Finance Case Study

Client

A highly respected firm of Chartered Accountants who are part of a National Group and International Network. They are specialists in corporate finance services with over 15 partners and additional associates across two regional offices. Both offices deploy their mailings and telephone marketing simultaneously for maximum coverage.

Campaign brief

To uncover target firms with corporate finance requirements; specifically to arrange qualified appointments between new prospects and the visiting partners. During the preliminary calls, other data, such as personal email addresses, significant decision makers. Relevant company details such as size, structure and financial information is entered onto the database.

Client services

Project managing sales, mergers and acquisitions, raising finance and re-financing, company valuations, disposal of non-core subsidiaries, MBO's and MBI's, refinancing, succession planning and exit strategy.

Target data

OMB/SMEs or holding companies within the immediate catchments of the two regional offices.

Campaign 1

The data was separated by postcode to fall into the areas covered by each of the two offices, the companies were grouped by turnover into three brackets:

1. Under £5 million
2. £5 to £10 million (the ideal target market)
3. £10 million and above

Campaign 2

Targeting companies where major shareholders over 50 years of age. This data was specifically sourced to identify the individual Directors or Management Team most likely to require exit or succession planning and to create further potential for work with the buying Management Team.

Results

Continued sustained campaigns running for over 18 months and ongoing. Additional 'warm' prospects added to regional mailing list and raised awareness of the brand.

Corporate finance related signings in excess of £5000 each.