



# Bloom Bookkeepers | PROPOSAL REVIEW

28 August 2023



## AGENDA

- Recap
- Campaign Engagement
- Partnership Proposal
- Client Success
- Next Steps
- Anything Else?



# Recap | What We Heard

## Business Outcomes

- Focus on CPA Firms & Start-up Businesses (South Florida Region is primary target)
- Goal is to capture market share through new logo acquisition
- Flexible & scalable partnership
- Focus on Pre-Qualified Appointments to help secure sales cycles at ~2 weeks.

## Success

- Focused on Market share Acquisition
- Pressure test Go-To-Market strategy quickly, efficiently and cost effectively
- Improve Sales Velocity (from time spent prospecting to selling and generating revenue)
- Partner with a Lead Generation company that can help scale the business in South Florida

# The *GenSales* Way

*Campaign Engagement Process*

# SDR TEAM + SDR Callers



## ACCOUNT MANAGER

**Main POC.** Responsible for campaign strategy, results, client communication and reporting. Works closely with the delivery team.



## RESEARCH & DATA MANAGER

Responsible for **research, lead list builds, list modifications and database maximization.**



## QC MANAGER

Reviews every lead for accuracy and validation of **Genuine Interest & Genuine Need** before shared with you.



## OPERATIONS MANAGER

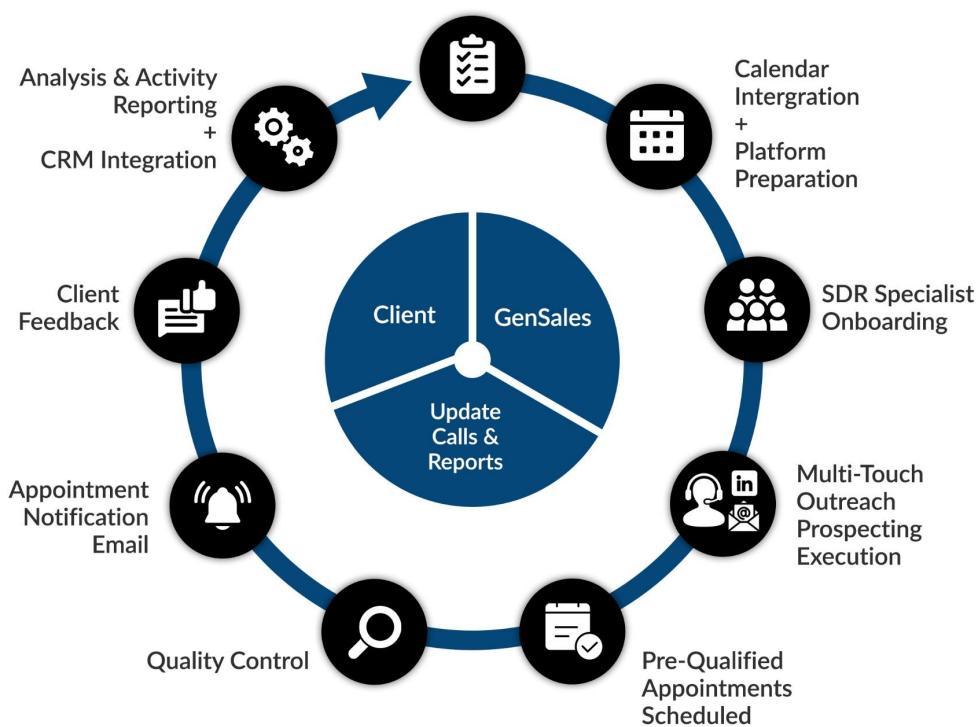
Responsible for SDR Caller **Training** and **Scheduling** for your campaign needs.



## SDR CALLERS

Experienced front line SDR calling specialists. Average of **15+ years inside sales experience** and ave 2-3 yr tenure with GenSales.

# Proven GenSales Process



# Lead Handoff

We Open. You Close.



- QC before handoff  
*Genuine Interest. Genuine Need*
- Email with appt details
- Summary of conversation
- Calendar Invite
- Seller Best Practice Guide
- Confirmation meeting held

Appointment Details

It is also encouraged that you phone them within 24 - 48 hours to introduce yourself as the person they will be meeting with.

Please note the appointment time is in the prospects time zone, not yours

Phone Appointment

Appointment Date: (Prospect's TimeZone)	Tuesday, April 18, 2023 1:00 PM EDT
SDR:	Kevin Rosario
Contact ID:	976864125
Company:	[REDACTED]
First Name:	Mark
Last Name:	[REDACTED]
Title:	CFO
Business Phone:	[REDACTED]
Alternate Phone:	

Address:	261 Weston Street	Number of Customers:	Over 3000
Email:	[REDACTED].com	Average Invoice Size:	\$600
Website:	<a href="http://www.goldbo.com">http://www.goldbo.com</a>	How frequently do your customers transact with you?	Daily
Do you sell to small to medium sized businesses (SMBs)?	Yes	Would extending longer terms to your SMB buyers help you increase sales?	No
Do you currently offer credit terms?	Yes	ASSIGNED REP	Trey McCurry

Red arrow pointing to the "ASSIGNED REP" field in the form above.

Last Comment:  
Phone Appointment scheduled for Tuesday, April 18th at 1pm EDT.  
CFO Mark [REDACTED] is interested in hearing more about the benefits of a partnership with [REDACTED]  
He had questions about how our services differ from factoring.  
They do offer credit terms to their 3000+ SMB customers and transact with them daily.  
Mark can be reached at [REDACTED] Email verified for invite.

## Two-Week Onboarding

### Plan-IT™ Strategy Session

### 60-90 Minute Plan-IT Session

Review Go-to-Market Strategy  
Align ownership

### Campaign Roadmap Development

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System set-up  
Playbook Creation  
Caller Onboarding & Training

### Prospect List Acquisition & Enhancement

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Research of ICP contact records  
Target Campaign Launch

# PROPOSAL REVIEW

## Proposal Review



Project  
6-8 appts/mo  
when  
ramped up

### Recommended

**\$ 5,000/mo**

- Set-up fee (one-time) **\$2,500**
- SDR Team w/ US Caller
- Plan-It Session, Playbook & Onboarding
- 3 month campaign
- Guarantee Program (8 min/campaign)
- Auto-renewal, 10- day cancel notice
- Flexible: add SDRs later

Project 10-12  
appts/mo  
when  
ramped up

### Alternative

**\$ 7,200/mo**

- Set-up fee (one-time) **\$2,500**
- SDR Team w/ US Caller
- Plan-It Session, Playbook & Onboarding
- 3 month campaign
- Guarantee Program (18 min/campaign)
- Auto-renewal, 10- day cancel notice
- Flexible: add SDRs later

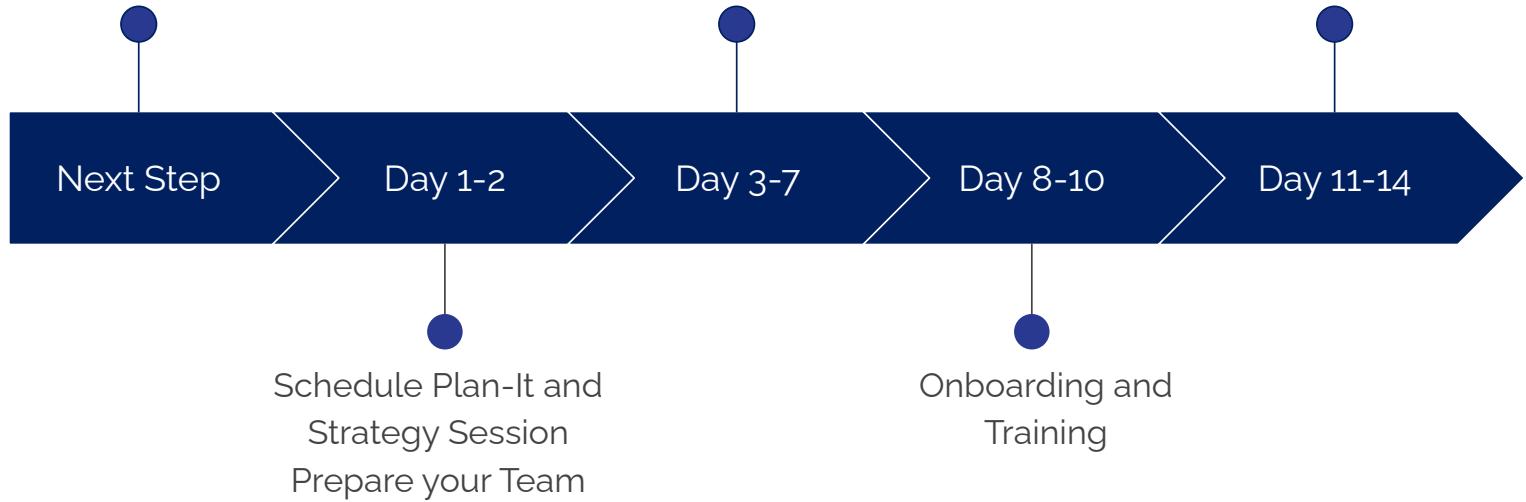
# Journey



Execute Partnership  
Agreement

Attend Plan-It

Campaign Launch



## Why choose GenSales?

*... because Results Matter.*



ROI

**74**

74% of clients renew their contract term with GenSales

Growth

**30**

30% of clients increase their original contract terms

Experience

**21**

GenSales has been in business for 21 years and have US-based SDRs with an average of 15 yrs inside sales experience

Partnership

**13-17**

Client tenure averages between 13-17 months in partnership with GenSales

Success

**10-12**

Campaigns average 10-12 hours to secure a meeting. Industry average is 18-25 hours through omni-channel.

# What does **SUCCESS** look like?



MINDSET

As an **extension of your business**, we're on the same team and want success as much as you do. Combining our **20+ years of experience** with your growth goals is a formula for great success!

STRATEGY

Every campaign has nuances; the timing in the market, the audience we're contacting and the **go-to-market approach** all require creativity and patience. Being **open to adjustments** and **providing feedback** are valuable.

BEST PRACTICE

The "**GenSales Way**" highlights the Best Practices we've proven successful in the market. As experts in lead generation and outbound marketing, we'll take the lead on appointment setting and lean on you for your industry expertise.

PARTNERSHIP

**Communication** is important and helps us make necessary decisions on your campaign strategy. Sharing **feedback on all appointments**, deals that were won, and being **available for meetings** and collaboration are all important.

## Client Success ... 100k+ appts set since 2002!



AT&T



TRANSWORLD  
Business Advisors

ibex.

COMCAST  
BUSINESS

LENNOX



TALLWOOD  
BUSINESS BROKERS



smartcare  
software

TURTLEWISE

PANTHEON™

FINSTRO

North West  
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ciena

SchoolBlocks

STS  
STATE LINE TRUCK SALES

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# Thank you.

