



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

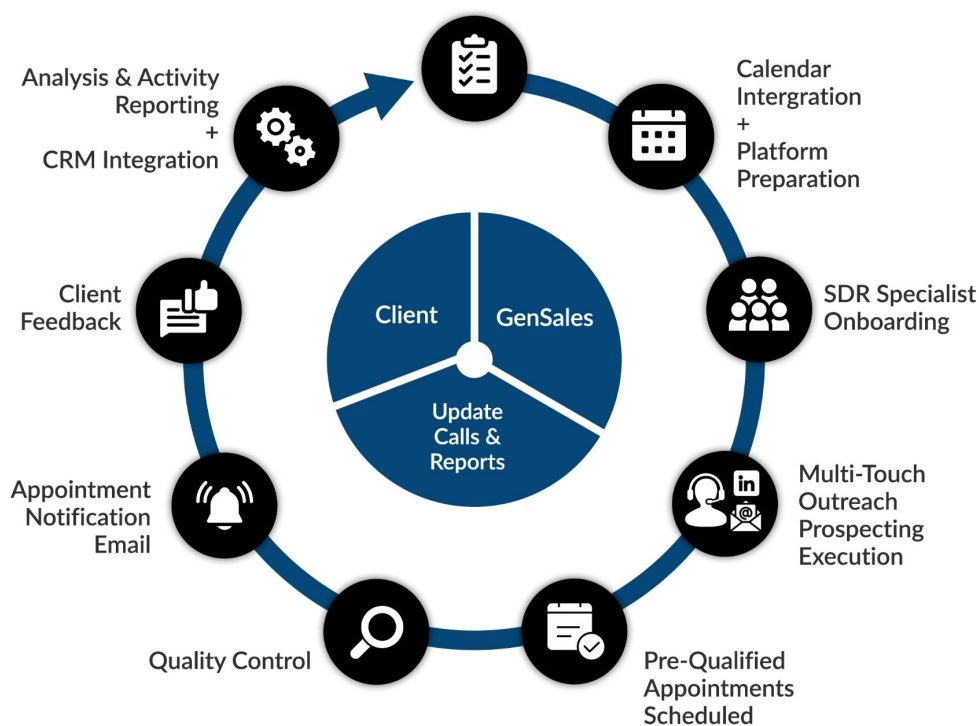
Responsible for SDR Caller **Training** and **Scheduling** for your campaign needs.



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
Email:	[REDACTED]
Website:	http://www.goldbo
Do you sell to small to medium sized businesses (SMBs)?	Yes
Do you currently offer credit terms?	Yes

Number of Customers:	Over 3000
Average Invoice Size:	\$600
How frequently do your customers transact with you?	Daily
Would extending longer terms to your SMB buyers help you increase sales?	No
ASSIGNED REP	Trey McCurry

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



Campaign Roadmap Development



Prospect List Acquisition & Enhancement

60-90 Minute Plan-IT Session

Review Go-to-Market Strategy
Align ownership

Campaign Roadmap Development

System set-up
Playbook Creation
Caller Onboarding & Training

Prospect List Acquisition and Enhancement

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

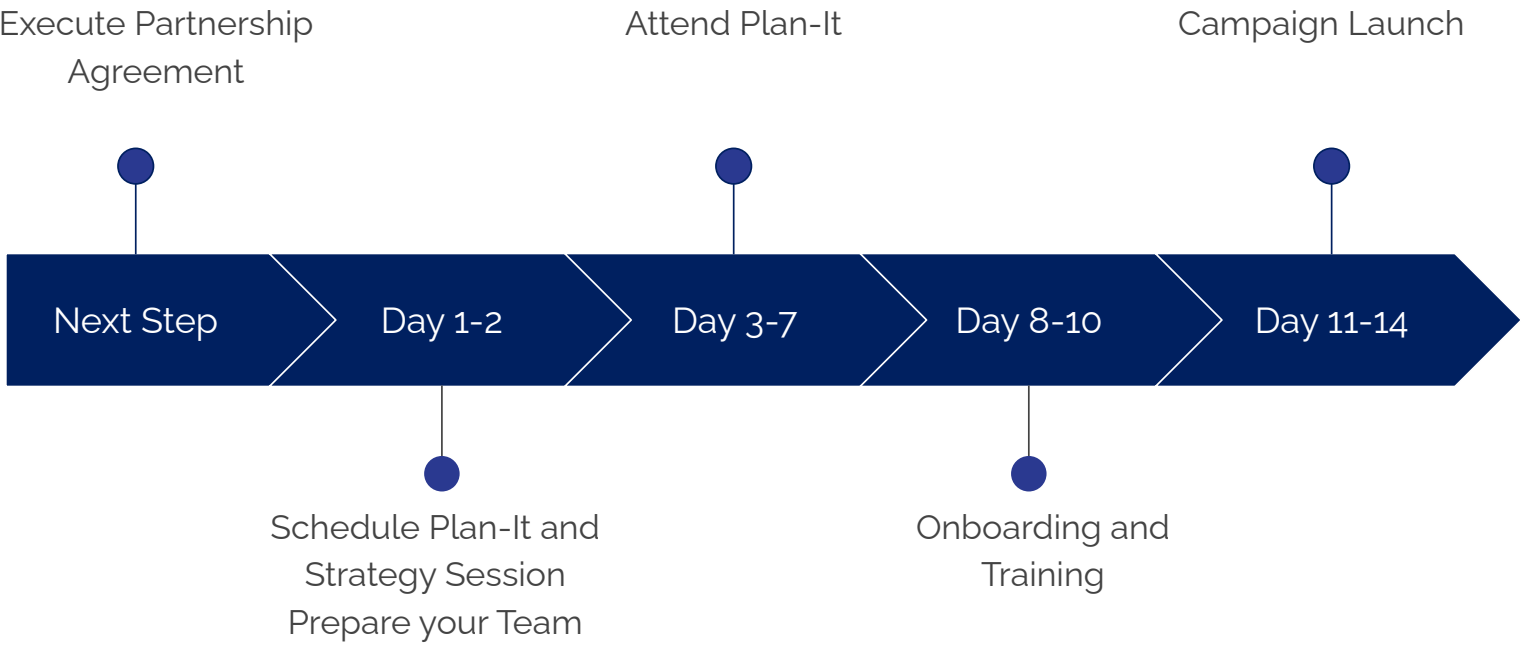
Project 10-12
appts/mo
when
ramped up

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



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



TALLWOOD
BUSINESS BROKERS



smartcare
software



TURTLEWISE

LENNOX

FINSTRO



North West
Roofing



PANTHEON™

ciena



SchoolBlocks

STs
STATE LINE TRUCK SALES



Thank you.

