

Expert Business Development Case Study

Wind River Financial



Company Profile

Wind River Financial, Inc. provides credit card and electronic payment processing services to businesses across a wide range of industries, including retail, lodging, restaurants, healthcare, wholesale, mail order, and online marketers.

Marketing Goals & Challenges

“We realized that during the unprecedented financial turmoil in our economy, and with regulators scrutinizing the entire credit card industry, we were likely to face heavier competition in offering merchants our services. We decided that the EBD team and methodology—experienced and knowledgeable professionals trained to engage CEOs, Presidents and other senior management in meaningful dialogue—provided us with the greatest opportunity to grow our business.”

Mark Wellnitz, VP of Sales and Marketing

Due to the economic turmoil in the financial services arena over the past years, Wind River found building new client relationships difficult. However, they were intent on expanding their client base despite this roadblock and consulted EBD to assist them in doing so.

EBD Solution

With Wind River's Wisconsin-based prospects as priority targets, EBD's agents executed a calling campaign to market services and set appointments with company executives. In addition to setting appointments, EBD agents gathered, verified and recorded all prospect information for Wind River's immediate use when preparing for an appointment as well as future use in following-up with those companies that are not yet ready to meet.

"EBD was able to make an appointment with the CFO of a potentially large customer where Wind River's sales team had tried unsuccessfully for several years."

Mark Wellnitz

Results

Calling on a list of over 1200 prospects, EBD agents engaged 572 unique decision makers at those companies. During the first sixty days of the project, EBD secured nearly triple the number of highly-qualified appointments for Wind River executives than the company had generated on its own during a similar period. In total, EBD delivered 109 qualified appointments to Wind River's sales team, as well as valuable intelligence on every company we engaged.

"The early returns are exciting; the entire EBD team has been very responsive, and they delivered on all promises including extremely professional callers, comprehensive reporting, and positive feedback from our prospects. Within the first six weeks of the engagement, EBD uncovered a dissatisfied merchant previously unaware of Wind River and its services. Quite unexpectedly, my team immediately converted them into a new customer, shortening what is typically a much longer sales cycle for a new account of this size."

Mark Wellnitz