



# The Mx Group

## **FIS Payment Services Database and Lead Gen Program**

8/8/2017 (rev.1 8/22/17)

# What we understand

- **Smaller group within \$3bil Payment Services division**
  - Card services - debit/credit/fraud
  - Selling into banks (assets > \$250mil), and credit unions (assets > \$100mil)
  - +/-10 sales people focused on this product line
- **Longer lead time selling cycle**
  - Typically resulting in 3-5 year contracts
  - Sometimes tied into a broader relationship that may be difficult to displace
  - Targeting *operations* and *senior business management* decision makers (based on size)
- **Want to grow share / business**
  - surface opportunities at time of consideration
  - Support “limited bandwidth” sales team

# Target audience

	Banks	CU's
Total organizations	5,349	6,022
Asset threshold (\$250/\$100m)	2,556	1,600
Current FIS Card customers	1,000	621
Target prospect organizations	1,556	979
Plus 10% of customers	100	62
<b>Total target organizations</b>	<b>1,656</b>	<b>1,041</b>
<b>Two decion makers per org.</b>	<b>3,312</b>	<b>2,082</b>

# Since our calls...

- **Engaged senior management at a local bank to:**
  - Understand their decision process and vendor agreement
  - Identify events, portals, publications, etc. that might be a source of data
  - Gain insight into key messaging levers of decision makers/influencers
- **Researched 3<sup>rd</sup> party databases to:**
  - Understand segments and availability of data
  - Get counts for target segments and decision makers
- **Developed a pro-forma program outline**

# Data sources

- **FIS Payments internal customer and prospect data**
- **Affinity databases**
  - Publications -- American Banker, Credit Union Journal, BS&T, etc.
  - Trade Associations – ABA, etc.
  - LinkedIn Groups – Bank and Finance Technology
- **Compiled databases**
  - Hoovers
  - DemandBase
  - Multiple specialized vendors

American Banker Magazine –  
top level select options

Total list	56,217
Postal addresses	56,217
Phone #s	55,138
Email addresses	14,242
<b>Asset size:</b>	
Less than 250 Million	20,452
250 Million to 500 Million	7,255
500 Million to 1 Billion	5,749
1 to 10 Billion	8,178
10 to 50 Billion	4,193
Over 50 Billion	8,816
<b>Business / industry type:</b>	
Commercial banks	29,326
Community bank	13,768
Finance company	3,117
Savings bank	2,784
Securities, investment or mutual fund firm	2,166
Credit Union	2,035
Investment bank	1,566
Insurance firm	1,203
Mortgage company	1,202
Other	886
Credit card company	624
Government	19
<b>Employee size:</b>	
1-199	7,656
200-499	1,642
500-999	853
1,000-4,999	1,302
5,000-9,999	428
10,000-25,000	673
Over 25,000	1,992
<b>Job Function:</b>	
Corporate management	6,888
Commercial lending	5,218
Other	4,905
Operations	4,880
Accounting/financial management	3,121
Retail Banking	2,842
Marketing/business dev/CRM	2,554
IT/IS/MIS/DP	1,766
Mortgage lending	1,675
Trust/private banking	1,395
Retail investment products	892
Consumer lending	754
Credit cards	497

# Proposed Program

# Data acquisition / consolidation / analysis

- **Objectives:**

- Have in the database every bank and CU in our sweet spot
- Know if they are a current FIS Card Services customer
- Identify if we have
  - Current Card Services vendor
  - Projected renewal or purchase date (PPD)
  - Decision maker and key influencers

- **Process**

- Aggregate internal customer database and CRM prospect database
- Purchase 3<sup>rd</sup> party data of organizations and contacts
- Standardize and run key analytics for baseline reporting

# Outbound calling to build database

## ▪ Objectives:

- Identify current Card Services vendor
- Gain visibility into decision timeline - identify PPD
- Verify decision maker and/or key influencers
- Obtain email address(es)
- Determine if would like to speak with someone

## ▪ Process

- Calling
  - Develop call guide
  - Prioritize call targets
  - Conduct test calls to validate assumptions / tweak process and call guide
  - Call full target population
- Reporting
  - Weekly reporting / call review / database updates
  - Qualified sales leads sent to field sales reps as identified

# Possible downstream activities (from the data)

- Territory playbooks
- Market activation and nurture journeys
  - Dimensional direct mail
  - Email and retargeting
- Thought leadership
  - Ebooks
  - Webinars
  - Public relations
  - Assessment tools

# Pro-forma Investment Summary

<b>1. DATA ACQUISITION, CONSOLIDATION AND ANALYSIS</b>	<b>\$17,500</b>
Aggregate existing customer and prospect data from FIS CRM	
3rd party data acquisition and augmentation	
Standardize, clean, run key analytics and baseline reports	
<b>Outside Cost: Data</b>	<b>\$6,000</b>
<b>2. DATABASE BUILDING AND OPPORTUNITY IDENTIFICATION (TELEMARKETING)</b>	<b>\$30,000</b>
Set-up, call guide(s), training	
Call activity (estimated at 2700 org records, 2-step calls, 5 attempts per record)	
Reporting, database updates and qualified lead distribution	
<b>3. ONGOING COMMUNICATION AND NURTURING</b>	<b>TBD</b>
Territory playbooks for sales team	
Market activation	
Thought leadership	
<b>4. STRATEGY AND PROGRAM MANAGEMENT</b>	<b>\$7,500</b>
Discovery and research	
Sales and marketing insights	
Program administration	
<b>TOTAL</b>	<b>\$61,000</b>

# Pro-forma timeline

# Next steps...

- Review and validate assumptions and program
- Approve program elements, sign MSA
- Schedule kick-off and data discovery
- Begin the work
- Establish program status meeting cadence
- Refine deliverables and reporting
- **GET RESULTS!**

# Thank You