



How an appointment generation strategy helped **Exdion Solutions**, an Insurtech that partners with Insurance Agencies and Brokers, generate appointments and 4 new account **wins** in the past 6 months.

CASE STUDY

The Snapshot:

The Company: Exdion Solutions

The Industry: Insurtech

The Solution: Appointment Generation, Lead scoring
& Lead Management

Location: North American Subcontinent



The Situation:

Exdion Solutions looks to spur sales in North America and to identify opportunities for business growth



No matter how inventive an insurtech solution may be, one thing is certain: breaking through the noise of today's digital marketplace to spread the word can be strenuous.

That was the case for Exdion Solutions, a company dedicated to developing digital transformations that partners with Insurance Agencies and Brokers to enable future ready businesses.

Exdion Solutions, headquartered in Plano, TX and also operates out of multiple facilities in India was eager to hire a Appointment Generation partner that could assist them expand their business in American continent within six months by setting up appointments and increase the facetime with needy prospects. The client was also concerned about data confidentiality, authenticity, and compliance.

To assist them in meeting their ambitious sales targets and appointment setting, Only-B2B was well equipped to generate appointments and implement solutions to generate more prospects.

The Challenges:

Exdion Solutions needed to find a more efficient way to work to generate appointments and to reach the wide target market.



Exdion offered impressive solutions, however they were facing issues with connecting with the prospects to sell their solutions.

Only-B2B began by doing an evaluation of "what's working." Finding the proper market size, opportunities, creating a database of prospective customers, obtaining reliable intent data, and branding oneself as a mature player in the insurtech field were all hurdles. And, of course, it was necessary to create new opportunities while staying inside the confines of American privacy laws and California Consumer Privacy Act (CCPA)

The company was looking for a partner with experience in setting up demand generation appointments in the American subcontinent, as well as someone who could conduct market research and build a B2B list. There are the top 100 brokers and then there are about 25,000 plus agencies and brokers that are small to medium size businesses. All of these organizations had a technology need. Exdion's solutions wanted to address these needs but they had to reach a very wide group.

The Approach:

Amplify sales with lead nurturing and appointment setting, as well as market research, by creating an accurate database to support every level of the pipeline.



Following the Exdion Solutions team's sharing of their objectives with Only-B2B, a number of preliminary actions and "fast wins" were set in motion. Plans and strategies for a multi-tiered growth strategy considering revenue at its heart were also created.

A long-term strategy that would attract prospects and set up meetings throughout the buyer's Journey was lacking. The effectiveness of this strategy hinges on a few key strategies, as implemented by Only-B2B:

01

B2B List building and verification along with extensive market research.

02

Appointment Setting and More Prospect Conversions

03

Identifying prospects and companies with an intent to buy digital transformation products.

04

Identify the accurate sales pipeline and prospects related to Insurtech.

05

Increase in facetime with ideal prospects looking for similar solutions.

Only-B2B leveraged its proactive team and implemented the requisite services as a solution to the challenges. We started with our list-building service, executed lead scoring and management methods to create a strong B2B list. We used LinkedIn to build a highly targeted prospect list. We understand how vital it is to build a robust Ideal Customer Profile (ICP) to gather the best prospects that would turn into customers. We strategized our appointment setting process and successfully generated the database of qualified companies and prospects, which was certainly ameliorated with the intent data we generated.

The Results:

An increase in facetime with ideal prospects looking for solutions in digital transformations and Insurtech with a mountain of revenue generated along with 4 new account wins in the past 6 months.



The aggressive marketing approach began to show results soon following the engagement with Only-B2B. Number of appointments increased dramatically, with increase in facetime and eventually the sales funnel was accelerated for Exdion Solutions.

- 01 **Services helped client to generate 104 meeting and contributed to revenue acceleration.**
- 02 **Initiated sales pipeline of more than \$1.8 million.**
- 03 **Identified 100+ qualified companies**
- 04 **Appointment setting, B2B list building and market research lead to 4 account wins within 6 months.**

The Conclusion:

Staying the course with B2B marketing strategies and working towards to optimizing performance.

The project, without compromising the quality was approached and delivered successfully within 6 months as committed. We created a strong database ensuring no data redundancy and duplicity. Our customized and extensive market research service, helped to generate meetings with ideal prospects and eventually increased the volume of targeted personas.

“We are able to market ourself through Only-B2B in US Insurance Broker space. The calls they have made on behalf of us clearly helped us establish our presence in the broader market. Our experience using them has been great. They set up a solid communication mechanism for us to ensure smooth flow of communication between our sales teams and the B2B team. We have had past experiences with other vendors and none came close to the experience with B2B.” -Exdion Solutions

Want to unlock the mysteries of B2B marketing? Contact Only-B2B today – we’d be happy to help.

BUSINESS MODEL - AG

1

A qualified appointment is where a prospect has confirmed 30 minutes Face time on his calendar and currently responsible for product or services offered by our client.

In all our scheduled meetings prospects are aware about the reason of the call – As Only-b2b rep's gives a quick recap about their initial conversation with the prospect. & sets up the agenda again, before the meeting.

2

3

Meeting is blocked on calendar & accepted by prospect.

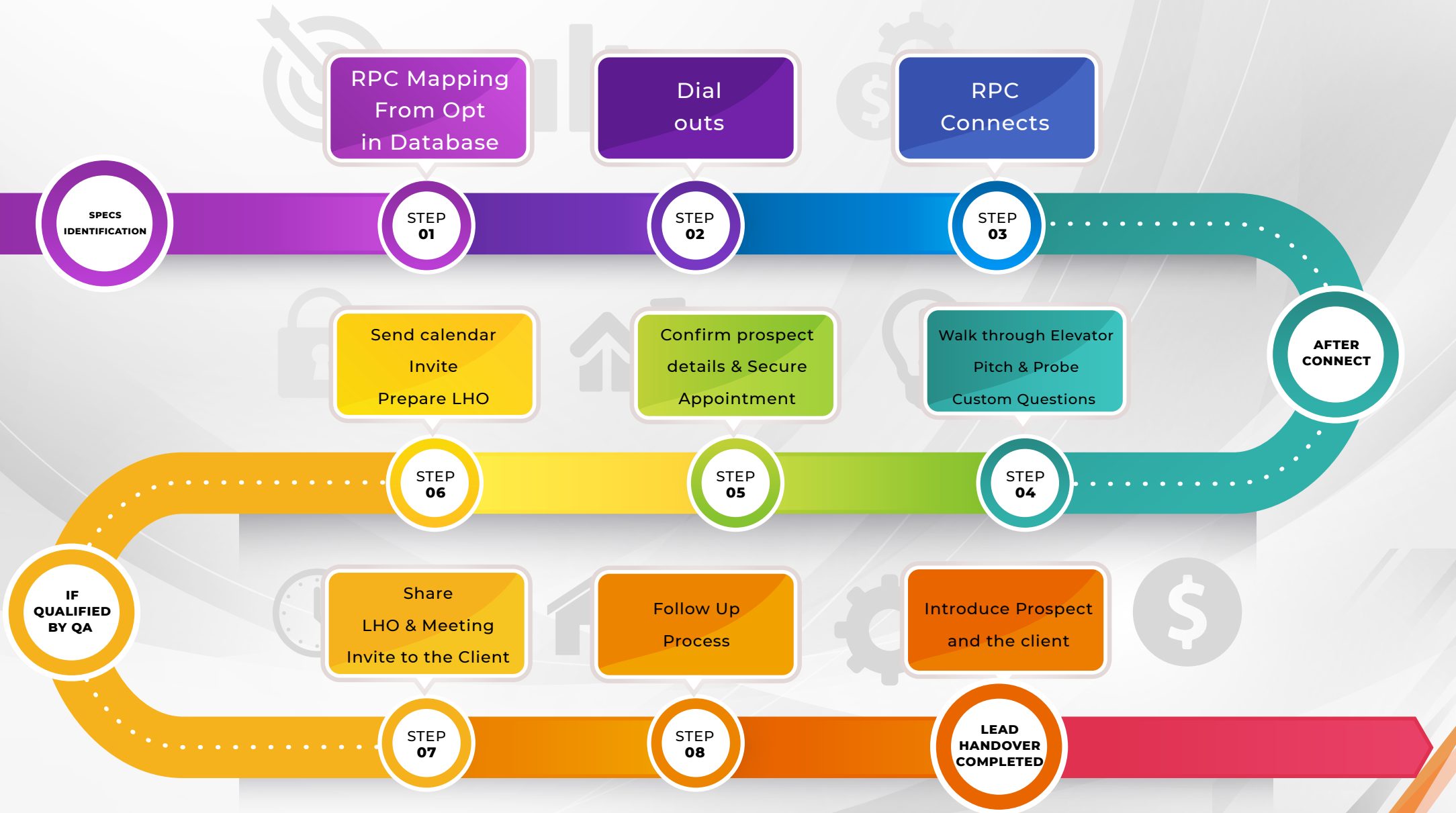
All Leads are QA audited

Prospect is Either a
Decision Maker
Influencer
Recommender.

4

PROCESS ROADMAP

Execution Plan **Appointment Setting**



Contact Us



📍 3rd Floor, 301 B, Bldg – Alpha 2, Giga Space, S No 198/1B, Viman Nagar, Pune, Maharashtra – 411014

✉️ info@only-b2b.com

☎️ +91-7028141720 | +91-7028141730