Individual Assignment

Case Study - A New Agency With Inbound Ambitions

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Situational Analysis:
A New Agency in the B2B IT Industry

Strengths	Weaknesses	Opportunities	Threats
More than 10 + years of experience in the IT field

An existing website with a contact form

May consider a paid version of CRM software | Leads are not stored in a database

Leads are sent to generic "contact us" email

Leads' inquiries are responded to manually and sometimes delegated to other team members.

No workflow of operations is established

The budget for the Software platform is limited. 10$ per person monthly

Doubling work or working inefficiently | Implementation of Free CRM software

Opportunity to switch to the paid version of a CRM tool based on the company's business needs

Leveraging all existing tools of CRM system with the main focus on marketing, sales and customer support

Automation and optimization of business operations to reach maximum efficiency in closing B2B deals | A high risk of losing a service-qualified lead in the consideration stage of the customer journey.

Competitors that already use a CRM platform may take over the potential leads and current customers of the agency. |

Business Objectives and Marketing Goals

Mission: *"To introduce inbound marketing to the B2B IT sector."*

Business objective: **To implement the newest CRM and marketing automation technologies in the company's marketing and sales processes.**

Marketing Goals:

The company's main objective is to automate the buyer's journey at every stage of the cycle in order to achieve the following specific objectives:

1. Manage lead records in a single, central database to streamline the lead creation procedure.

2. Based on their position in the buyer's journey, leads are automatically tracked, scored, and assigned to the appropriate departments.

3. Increase B2B lead generation and conversion through inbound marketing initiatives.

4. using genuine customer care and sales automation, to improve and personalise the customer experience.

Recommendations

It is advised to use the Active Campaign CRM programme in light of the aforementioned marketing objectives.
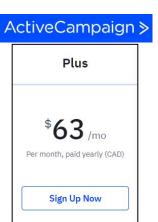
Rationale:

- Built-in CRM: This will allow the business to keep track of its contacts and update them automatically.

- Contact and lead scoring: Lead scoring will reveal information about consumer preparedness, boosting sales effectiveness.

- There are up to 25 users:

- – The Active Campaign Plus plan, which takes into account the company's potential expansion, is the ideal size for it.

- Database Sync: This will enable the organisation to synchronise information from all current sources into a single database that can be accessed by all team members. Consequently, the process will be improved.

- Email-based & live chat support: Improved customer service and live chats with pre-written responses will hasten the process of answering customers' questions.

- CRM and Inbox Sync: CRM and team email can be synced.

- Sales automation: This will assist in removing repetitive duties associated with lead generation, sales pipelines, and follow-up. In turn, this will lead to a more tailored approach to B2B clients.

- Deal Assignment: Giving salespeople deals to work on and establishing tasks

- Customer Health Scoring: to gain a deeper understanding of customers and provide better solutions. Customers will become brand advocates as a result of this.

Budget Per Month

It is advised to choose **Active Campaign Plus** since it especially addresses B2B needs, offers additional capability, and satisfies the agency's marketing objectives.

✔ Lead Management
✔ Lead Scoring
✔ Lead Database
✔ Personalized Customer Support
✔ Sales Automation
✔ Email Campaigns

Another option to consider is the HubSpot Free Plan. It doesn't have a lot of utility, though. The platform also lacks crucial features like lead scoring, customer health scores, and sales automation. Only the Professional User Plan, whose price is outside the allotted budget, offers these options. Only the Professional User Plan, whose price surpasses the whole budget, offers these features.

ActiveCampaign ≫

Plus

$63 /mo

Per month, paid yearly (CAD)

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