



**Blake Bevill**

Sales Representative  
Proforma Horizon Total Source  
Tyler, Texas

# PERSISTENCE PAYS OFF

## HOW BLAKE BEVILL LANDED A NEW ACCOUNT WITH THE HELP OF THE APPOINTMENT SETTING TEAM

**What:** 90th Anniversary Swag for New Client

**Who:** Blake Bevill, Sales Representative, Proforma Horizon Total Source, Tyler, Texas

**How:** Sales Automation and Appointment Setting

Don't get discouraged if a sale doesn't result from your first call, your second call or even your third call. Just ask Blake Bevill of Proforma Horizon Total Source in Tyler, Texas. He knows it can take months of follow-up ... 9 months in this case! But luckily for Bevill, his persistence paid off and he now has a happy client who has already placed additional orders.

### Put Sales Automation & Appointment Setting to Work for You

Bevill used the Sales Automation campaign with Appointment Setting follow-up to generate leads for Proforma Horizon Total Source. After the direct mail piece was received by Henry & Peters, CPA, Kim Brooks, Appointment Setting Specialist, reached out to them with a follow-up call, discussing how Bevill could help their business. She was able to score Bevill a meeting with the full-service accounting firm in February 2018.

While that meeting was productive and seemingly went well, a deal was not made at the time. However, Bevill persisted and kept in communication with the potential client to stay top of mind. By continually reaching out, Bevill secured a deal worth nearly \$7,000 nine months after his initial sit-down with Henry & Peters, CPA.

### Quality Service + Quality Products = Great Customer Relationship

Henry & Peters was celebrating their 90th anniversary and wanted to give their employees a special gift to commemorate the momentous occasion. The gift they chose was a Columbia jacket with their 90th anniversary logo. The CPA firm used a third-party to design the logo, but unfortunately it was not properly oriented to fit the jacket. Proforma Horizon Total Source's in-house graphic designer came to the rescue and was able to resize the logo without compromising design quality. In addition, Proforma Horizon Total Source was able to provide the customer with the perfect thread colors to match their color scheme, which resulted in a professional-looking Columbia jacket with a beautifully embroidered, contemporary logo for Henry & Peters' employees.

Henry & Peters' employees were impressed with the quality of the jacket and the logo, and the client was appreciative of the detail that Proforma Horizon Total Source put into perfecting the order. The CPA firm continued its 90th anniversary celebration throughout the year, and they turned to Bevill to place another order for more promotional items with the custom logo. In total, Henry & Peters have now ordered more than \$10,500 worth of 90th anniversary items from Proforma Horizon Total Source.

### Don't Give Up

Even if you think a lead has gone cold, nurturing that relationship could pay off in the end. While it took 9 months for the initial order to be placed, Bevill has earned a loyal customer and all it took was a few follow-up calls placed over the course of the year to keep his company name top of mind. When the need presented itself, Henry & Peters made the call to Bevill because of his persistence.

"I am so glad we continually called on the customer and am hopeful for the future with this new client," says Bevill. "I am also thankful for the Sales Automation Team discovering and setting up the appointment with the customer. Without their help, we would have missed out on a great opportunity!"



If you have any questions about Sales Automation or Appointment Setting, please contact Chris Arvay, Senior Business Development Manager (CArvey@Proforma.com or ext. 1928) at your Worldwide Support Center – Cleveland.