



Helping you get on your prospects Shortlist



Introduction

Thank you for considering Shortlist Marketing as a partner to help you hit your sales targets.

Our model is very different to the Lead Generation you may have experienced in the past, and I hope after reading through this document you will understand why Shortlist offer such a different model.

Throughout this document, you'll learn more about Shortlist Marketing, how our services can support your goals, and how our expertise and methodology have evolved over the last 10 years, putting us in the best position possible to deliver results for your organisation.

I would suggest we arrange a time together to discuss the documentation together and explain how each of the areas are implemented and structured, from there we can begin to build a full proposal for any opportunities you have going forward.

My meeting link and contact details are below, should you wish to reach out, otherwise I'll be in touch again next week.

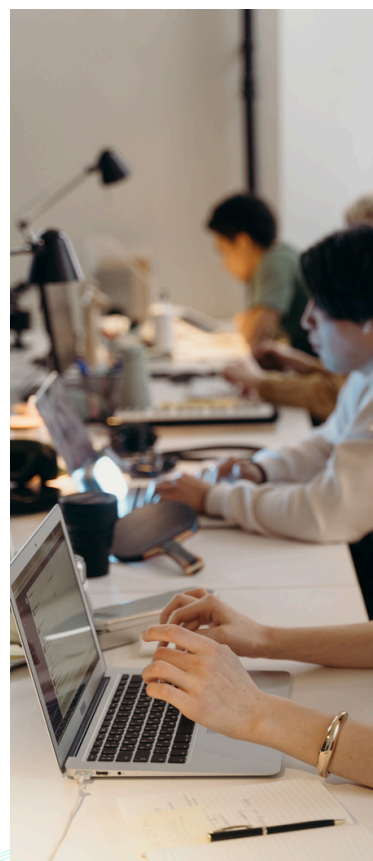
Many thanks,

Phil

Phil R

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-  Shortlist Marketing
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[Book a meeting.](#)



Why Shortlist?

Experts across markets

We've worked across numerous B2B software and technology industries, helping drive sales for organisations. Since 2010, our methodology has been proven to succeed and generate sales in the most competitive of landscapes.

Proven methodology

Over the last decade, we've honed our methodology, finding the right mix of technology, outreach and skilled personnel to ensure our campaign is in the best position possible to achieve your goals.

Proud to work in partnership with:



In 2023 we...



Reduced
customer
acquisition costs
by 50%



Delivered 20x
ROI for clients



Helped clients
break into new
UK markets



Generated over
750 well qualified
sales-opportunities
for our clients this
year

Our methodology

Turning prospects into customers



Build an accurate database of your target market, complete with company, contact and intent data.



Outreach into your target markets with pain-driven messaging, across multiple proven channels.



Build brand recognition as we engage with, qualify and nurture leads in your new data pool.



Well-qualified opportunities that meet your criteria will be handed over to your sales team to manage and close.



Shortlist Marketing will continue to nurture the longer-term pipeline, converting them to opportunities at the appropriate time.



Provide feedback at all stages, to always ensure we're maximising the chance of success.



Our working partnership

Here's a typical roadmap to success

Onboarding:

We will implement our proven methodology and relevant technology, build the data, conduct knowledge transfer workshops, plan the structure of the campaign and create targeted messaging. This first month is all about setting the foundation of success for your organisation



Campaign kick-off:

This is where our hard work in onboarding will come to fruition, taking all our new understanding to market and beginning our outreach. The SDR will start to uncover pains and industry trends to support our future outreach.



Data enrichment:

Throughout the campaign, your database will continue to grow. New contacts will be added in via buying signals and intent data. We'll use these signals to target new organisations, increasing our scope and giving our partnership the capabilities to drive exciting opportunities.



Continuous success:

All elements will be working in unison, with our messaging and understanding growing based on the market needs, opportunities being created and new prospects being identified, as we move towards a continuous Lead Generation model.



Prioritising the right leads

Shortlist Marketing prides itself on its proven approach of only handing leads over when they're well-qualified and sales-ready.

Our founder Phil Richardson, has been working in Lead Generation since the late 90's, working on thousands of campaigns to find the ideal approach to appointment setting.

With a background in Sales & Marketing across Software industries, Phil understood the frustrations of receiving long-term and low-quality leads, which his team was left to nurture despite outsourcing their Lead Generation.

Phil experimented with models across pay-per-lead and telemarketing before setting on a high-qualification approach to deliver more value.

Shortlist uses this same methodology to focus our campaigns on generating well-qualified sales opportunities for your team. This methodology sets us apart from other solutions, putting your sales team in a position to close high-quality opportunities, rather than having to nurture a long list of names.

In 2023, over 95% of opportunities we generated, progressed after handover - highlighting our commitment to only hand over leads when we believe they are truly sales-ready.



We take the time to effectively nurture all leads in the database, ensuring high-qualification every time.



We leave no stone unturned, using our knowledge to effectively generate high-quality, sales-ready leads.



Our methodology is designed to generate ROI, putting your team in a position to close more deals than other Lead Generation models.

Our bespoke approach to data

Your data for life

Your clients are as unique as your business. That's why a one-size-fits-all approach just won't do when it comes to creating your database.

At Shortlist Marketing, we have a dedicated team of researchers, who manage all of our data building in-house. Using a mixture of online tools, desk research and telephone research we build data to your exact specification, creating an accurate database of potential customers for us to engage with.

With the right database, you will save time, money and effort by ensuring you only target those who are an ideal fit for your business.

This database will be uploaded to HubSpot to support our campaign, but you're not borrowing it. It's your data, to keep, for life.

Your new database won't stagnate, we'll use buying signals and other triggers to grow and expand the data as the campaign progresses. These buying signals can range from; new hires, growth, investment and intent, meaning if there are any changes within your target markets, we ensure your brand will be the first one to reach out.



One 100 sales opportunities created in the clients pipeline, in 12-months.



Opportunities generated in 5 countries across the UK and Europe



Generated 5x ROI through closed deals.

Bespoke software case study:

Shortlist continues to work with an organisation that delivers bespoke transformation projects to 100s of clients globally. Our client offers solutions to help tackle highly complex agile transformation and software development challenges.



Your dedicated SDR

The heart of your lead generation campaign

The SDR is at the heart of every campaign at Shortlist Marketing. The SDR will become a member of your team, with an employee email address and LinkedIn profile, allowing us to outreach like any other member of your team.



Your dedicated SDR will be responsible for bringing together all elements of the campaign, using HubSpot, data enrichment and proven outreach channels to effectively communicate with your target markets.

All of this will allow us to effectively nurture and convert as many leads as possible in the database.

Best of breed technology

Technology is a crucial component of our partnership. By leveraging new channels, and introducing automation, we're able to unlock the full potential of our Lead Generation model.

HubSpot

HubSpot CRM gives us complete visibility and access to our target database. This gives us the tools to view contacts, understand their progression and observe our outreach. With HubSpot's visibility, we can accurately understand the success of our working partnership.



LinkedIn

LinkedIn has quickly become one of the most powerful sales channels. By using Sales Navigator and other LinkedIn tools, we're able to efficiently identify and communicate to prospects using the platform, adding another channel to our outreach arsenal. **82% of qualified leads receive a LinkedIn touchpoint on average**



Lead Forensics

Web visitor identification allows us to identify anonymous intent data. This tool means we can actively target companies and contacts who are likely to be in the later stages of the sales cycle. Identified companies are then added to the database to receive targeted outreach, resulting in higher qualifications.



Web chat

Taking a proactive approach to engaging with web visitors by giving them direct communication with your SDR. These chats have a two-minute SLA during working hours, meaning every enquiry is handled professionally and effectively.



Video

A personalised and unique approach to outbound Lead Generation, video acts as a fantastic tool to generate conversations across LinkedIn and email, with a higher engagement rate than text messages.



Industry leading Services

A breakdown of our award-winning services

Lead Generation



We take the time to understand your company, products, market and competitors to generate the quality leads you need. We then use our extensive skill and experience to manage your prospects and deliver effective messaging to them at the key stages of your unique pipeline, carefully nurturing them into promising opportunities for your sales team.

Lead Nurture



We will effectively nurture all leads in your sales pipeline, freeing up your sales team to focus on closing new deals. Your team can concentrate on opportunities that are likely to result in immediate business, whilst we take care of the rest of your pipeline, helping your organisation generate as many opportunities as possible.

Intent Conversion



By working in partnership with Shortlist, you'll unlock intent data, in the form of engaged clicks, web visitors, connections and form submissions. With this visibility, Shortlist Marketing will effectively engage with all intent prospects. Putting your organisation in the best position to generate immediate opportunities from your intent data - generating ROI on all your digital investments.

Win-loss Analysis



Our Win-Loss Analysis provides you and your sales team with a deep understanding of which areas of your customer journey require improvement and how it compares to your competitors, looking at how you won (and lost) recent business opportunities, to help you close more deals in the future.

Lead Generation

Generating high-quality sales leads that convert.

Finding and nurturing high-quality leads is a critical yet challenging task.

Many businesses struggle with generating relevant leads that fuel their sales pipeline. That's where our expert Lead Generation approach comes into play.

At Shortlist Marketing, we don't just give you a list of names; we provide a database of well-qualified, sales-ready opportunities. We identify the best opportunities and only hand over leads that are truly ready for your sales team to convert.

Let us help you build a stronger, more effective sales pipeline, so your team can focus on what they do best – closing deals.



Generating **£720,000** in the past 18 months for GOB2b

“Straight away I was impressed with the Shortlist Marketing team, they were very flexible and wanted to work with us to find a solution”

Paul Belworthy Sales and Marketing Manager

Why Choose Us?



Expertise: With years of experience in B2B lead generation, we understand the intricacies of your industry and know how to generate leads that convert.



Customised Approach: We don't believe in one-size-fits-all solutions. Our team takes the time to understand your unique business needs and crafts personalised strategies to drive results.



Quality Leads: We focus on delivering high-quality, targeted leads that are primed for conversion, maximising your ROI.



Proven Results: Don't just take our word for it. Our track record speaks for itself, with countless satisfied clients and millions of pounds in deals identified.

Our Methodology



We only hand over leads when they're well-qualified and sales-ready, creating a database of high-quality opportunities, not just lists of names.

We understand your company, products, market, and competitors, so we can generate the quality and quantity of leads you need.

We use our internal database, research capabilities, and industry experience to identify decision-makers in your target audience.

We utilise various communication channels to deliver targeted messaging at key stages of your pipeline, nurturing new data into promising opportunities for your sales team to close.

Lead Nurture

Increase your conversion of Marketing qualified Leads.

Your teams don't always have the time and resources to qualify and nurture all the leads that come from marketing.

But here's the thing: MQLs should be the backbone of any sales pipeline. A lot of time, effort, and expense go into generating these leads, making them a vital source of potential sales.

That's where we come in. Our lead nurture takes all the pain away, handling the initial engagement and nurturing of MQLs, freeing your sales team to do what they do best: closing deals.



"The Shortlist team has been invaluable to us, acting as an extension of our Commercial team. They take our marketing efforts and ensure all leads are thoroughly qualified and ready for our Sales team to close."

Katie McCauley, Senior Marketing Manager at SnapFulfill

Why Choose Us?



Higher Conversion Rates: We nurture leads with personalised strategies and consistent communication, ensuring prospects are well-informed and engaged by the time they reach your sales team. This leads to more closed deals.



Improved Lead Quality: Our thorough analysis and multi-channel nurturing approach ensure that only the most qualified leads reach your sales team, reducing time spent on unqualified leads and boosting efficiency.



Better Use of Resources: With our team managing lead nurturing, your sales resources are used more efficiently. Your best salespeople can focus on the most promising opportunities, maximising their impact.



Seamless Handoff: We work closely with your in-house teams to ensure a seamless transition of leads from marketing to sales, preventing any missed opportunities and providing your sales team with all the information they need to close deals.

Our Methodology

We take your existing and new MQLs, and craft personalised nurturing strategies that cater to the specific needs, pain points, and interests of your prospects.

We employ a multi-channel approach, utilising email, phone calls, and personalised content to maintain consistent communication throughout your prospects' buyer journey.

Nurturing leads into qualified opportunities to hand over to your sales teams to convert, ensuring no potential is left untapped.



Intent Conversion

Using different intent source to drive sales

Intent data is the most valuable and expensive type of data in the market. So you've got to make the most of it.

We'll use first-party and third-party intent, like web visits and relevant searches, along with other triggers like form submissions, to identify those who are likely in the later stages of the buyer journey.

After identifying these prospects, we'll effectively nurture and engage with relevant stakeholders until they're truly sales-ready. Helping you increase sales and get in front of your prospects before your competitors even reach out.



Generating **£720,000** in the past 18 months for GOB2b

"Straight away I was impressed with the Shortlist Marketing team, they were very flexible and wanted to work with us to find a solution"

Paul Belworthy Sales and Marketing Manager

Why Choose Us?



Real-Time Visitor Identification: Gain insight into which businesses are visiting your website in real-time.



Be the First to Engage: Benefit from our internal database, research capabilities, and industry experience to identify the best-fit contacts, ensuring you're the first provider to engage with potential customers.



Higher ROI and Qualified Leads: Guarantee a higher return on investment for your marketing and digital efforts by making the most of previously underutilised engagements, increasing overall conversion rates.



Proven Success: Rely on our track record of success in helping businesses like yours convert web traffic and other Intent leads into valuable opportunities.

Our Methodology



Using our internal database and research capabilities we identify prospects who have shown intent in your brand or similar solutions.

We initiate personalised follow-ups and nurture strategies to convert first and third party intent leads into sales-ready opportunities.

By tailoring our approach to each prospect's unique needs and interests, we maximise the chances of conversion.

This approach guarantees a higher return on investment for your digital channels and generates more qualified leads.

Messaging support

How our messaging team supports our campaign together

Marketing emails

Marketing emails promoting educational and informative content will be sent on segments to your database. These messages are informative & educational, to drive engagement for your SDRs to nurture.



Automated Sales outreach

Automated Sales outreach - also known as Sales Sequences - is the process of automatically sending contacts personalised emails based on buying signals or personas. These messages are used to drive conversation and focus on direct sales messages to move contacts down the sales pipeline.



1-2-1 personalisation

The Messaging team will design 1-2-1 templates for email and LinkedIn outreach, complete with personalisation tokens, which your SDR will send throughout the campaign. These messages are further personalised by your SDR and are often used to begin or follow-up after a conversation.



Additional services to discuss:



LinkedIn PPC:

Driving leads through targeted ad campaigns.



Retargeting:

Using web intent to engage with web visitors via PPC.



Content creation:

Creating blogs, whitepapers and landing pages to support our outreach.



ABM:

Targeting contacts within a number of high-value organisations.

See what our clients have to say



“Great company to work with. Extremely helpful and knowledgeable about the entire sales process, especially when it comes to sales tools and how to use them. I would highly recommend working with Shortlist Marketing.”

Gavin Perry, UK Business Lead at DevOn



“A fantastic business that can drive huge amounts of value in the form of Lead Generation and marketing. I Would highly recommend working with Shortlist. Friendly staff and very dedicated to supporting clients.”

Leo Petais, Head of New Business at TDX Group



“ We’re very happy with the work the Shortlist team has done for us. We were so pleased with our UK campaigns that we have now expanded their services to assist our US team as well.”

Katie McCauley, Senior Marketing Manager at SnapFulfil





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