



# Callbox ABM: Bridged the Gap Between Offshoring Expert and Target Clients

## THE CLIENT



**INDUSTRY**  
Media



**LOCATION**  
HK



**HEADQUARTERS**  
HK



**CAMPAIGN TYPE**  
Lead Generation & Appointment Setting



**TARGET LOCATION**  
HK, SG

### ABOUT

The Client is a leading media company in Hong Kong, providing news and finance information services to financial intermediaries and high net worth individuals. The services they provide include educating Chinese financial intermediaries on the effective use of tax planning and asset management through a series of summits. They work on a platform built from different media channels like online media, periodicals, and guides, to deliver the latest information and relevant topics to finance professionals.

### TARGET INDUSTRIES

Corporate services, Trust Companies, Private Bank, and Wealth Management

### TARGET CONTACTS

C-Levels, Business Development Managers, Directors, Marketing Directors, General Managers

## THE CHALLENGE

The Client connects Chinese financial consultants to companies that plan to bring their business offshore via financial conferences. These businesses could either be companies from neighboring countries in Asia that would want to be educated on how to bring investments to Hong Kong, as well as Hong Kong-based companies that would like to expand in other regions.

The Client is recognized as a crowd drawer to every financial summit they launch, but the leads generated from the impressive event attendance convert very low number of follow-ups, as most of the attendees were either just curious to hear what the meeting was all about or didn't really have a solid need for offshoring at all.

The Client thought they needed a more targeted audience who wanted to learn about offshoring, and interested to engage further. Add to that was the pressing time to expedite the project since a series of summits were already on the approving stage.

But, the Client didn't have the right tools to carry out the tasks needed for the upcoming summits which are to profile their target attendees, gauge the need of the prospects, and uncover the genuine interest for offshoring opportunities.

### HIGHLIGHTS

- Successfully launched an ABM campaign for a leading media company.
- Worked out profiling and prospecting activities that helped the Client convert more summit leads into warm follow-ups.
- Reached key objectives in terms of best-fit accounts and quality leads.

### RESULTS WITHIN 6 MONTHS



132 Sales Appointments



146 Marketing-Qualified Leads

Callbox designed an ABM Lead Generation & Appointment Setting campaign which consisted of:

- Account-Based Multi-Channel Lead Management which included Voice, Email, Chat, and Web.
- Sales Enablement & Support that provided Team Training, Account Setup, and Back Office Sales Support.
- Tools & Subscriptions to the Callbox Pipeline and HubSpot CRM.
- Account Management with Strategy Building, Reporting, and Product Knowledge.

### The Goals

- The Callbox team was to do Database Profiling by scrubbing off invalids from the list to keep the contacts updated.
- To call profiled contacts, and invite them to the Client's upcoming series of summits.
- Mainly, schedule face to face or online meetings with potential clients for the Client's consultants.

The campaign involved two key steps:



### Account Research and Selection

1. The Client specified target industries, locations, and relevant contacts.
2. Callbox worked out the Client's ideal customer profile (ICP) which served as a basis for identifying qualified accounts.
3. Callbox then compiled a list of potential contacts to target, which was reviewed and approved by the Client.



### Account and Prospect Profiling

1. The Client provided target relevant contacts for the Callbox team to reach out which consisted of detailed demographic and firmographic segmentations.
2. The buyer personas designated as the campaign's primary targets were C-Levels, Business Development Managers, Directors, Marketing Directors, General Managers.
3. The master contact list was segmented based on these personas, and was further grouped according to industry type.

## RESULTS

The leading media company was happy with the campaign turnout. With Callbox's multi-channel marketing campaign, the Client's list of customers were properly profiled and filtered according to their need and interest in the Client's services. And, 45% of these leads were converted into current customers, and are now successful investors in their chosen regions.

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