



## Online Events Boost Lead Generation and Increase Brand Awareness

Teres Solutions, Inc., a wholly-owned subsidiary of CRIF, is a leading provider of direct and indirect lending automation solutions. Founded in 2002, Teres Solutions helps credit unions, banks and finance companies turn their lending programs into highly profitable and efficient lines of business. A Launch Marketing client, Teres offers software and services to over 200 financial institutions.

### Challenge

*Generate Leads and Increase Product Awareness*

Teres Solutions is a recognized and trusted solution provider in the lending space and wanted to increase awareness across the industry of its solutions that span direct, indirect and merchant lending. Additionally, Teres Solutions was seeing increased competition entering the market and wanted to ensure it continued to build a strong market presence and generate leads through effectively communicating their solutions reliability and proven results. Teres also wanted to continue to fill the sales pipeline with new qualified leads and position itself as a thought leader with relevant and valuable content for prospects and customers-alike. In some cases, Teres wanted to cross-sell new solutions such as the Teres SAIL® Merchant Lending module to existing customers, but education was needed.

### Strategy

*Promote Industry Credibility and Solution Benefits*

Teres Solutions wanted a cost efficient, high impact way to spread the message to prospects and customers that it offers reliable solutions which deliver exceptional results and outperform the competition. To do this, Launch Marketing knew that the message would be best spread and better received if heard directly from a current customer and solution user that could relay their experience with Teres' products and how they measurably improved business and lending.



*"Across all of the campaigns they work with us on, we appreciate their attention to detail and strategic approach to executing cost effective lead generation programs."*

Tim Kelly  
CEO  
Teres Solutions

### Approach

*Leverage Current Customers for Online Web Events*

With a clear goal in mind, Launch Marketing developed a plan for Teres Solutions to host a series of online events called webinars (or web seminars). To develop and execute these webinars, Launch Marketing outlined the key elements involved, including: budget, target audience, promotional plan and lead time, topic/theme, speakers and technology. Once the framework was in place, Launch Marketing and Teres Solutions' executives began putting together the pieces to make these events happen with a complete execution of the first webinar in under 6 weeks.

Starting with the marketing message, Teres Solutions identified its key message for the first webinar as communicating the benefits of its market leading solution, SAIL, including the ease of integration and results achieved.

With the underlying messages in mind, Launch Marketing and Teres Solutions uncovered key prospects within the database that would be a good fit for attending the webinar. The next step was identifying and recruiting a



current customer to act as a featured speaker, as well as identifying the webinar technology provider that met the technology requirements and budgetary needs of Teres Solutions.

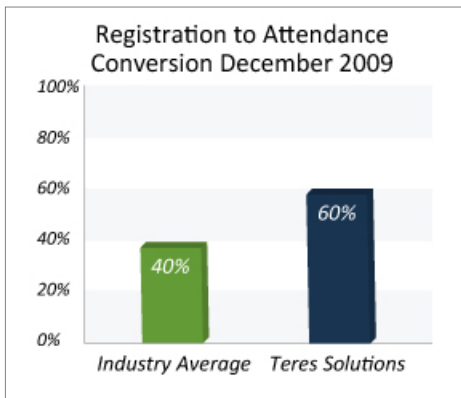
As each of the key elements came together, Launch Marketing worked on the promotional plan. To successfully promote this event and encourage attendance while meeting the strict budgetary needs, Launch Marketing outlined a plan that consisted of a series of targeted html and text emails that would span several weeks and contain quick links for recipients to register for the webinar. To support the promotional emails and help drive high attendance, Launch Marketing recommended going one step further by placing phone calls to strategic accounts and personally inviting key prospects and partners.

Once the promotional plan was approved, Launch Marketing developed the email creative and content for each of the scheduled email communications, as well as created a call script to be used when placing the recruiting calls. While the webinar promotions were in full swing, the team worked to develop compelling content, as well as provide presentation direction and guidance to the featured customer speaker. One week before the scheduled event, Launch Marketing set up a dry run where all participating members were able to walk through each step of the webinar in preparation for the live event.

**Success**

*Webinars Attract Key Prospects and Promote Marketing Message*

Teres Solutions' first webinar was a huge success and was used as a model for future events. Over several months, Teres Solutions successfully executed a series of webinars, which continued to be well received and successfully communicated the SAIL solution benefits and results to the target audience. The strategic direction provided by Launch Marketing to incorporate a customer speaker, combined with the successful execution of a multi-touch promotional plan, not only helped drive event attendance, but also provided increased credibility for more effective communication of key marketing messages.



“Launch Marketing really helped us execute a great webinar series that resulted in new leads and also moved some of our prospects further through the sales funnel. Across all of the campaigns they work with us on, we appreciate their attention to detail and strategic approach to executing cost effective lead generation programs,” said Tim Kelly, CEO of Teres Solutions.

For each webinar, Teres targeted a specific segment with approximately 200 invitees and averaged a 15% attendance rate. As a result of the great success achieved from these live events, Teres Solutions has adopted the webinar as a standard part of its marketing communications and has continued to see significant results.

“We will continue to use webinars as part of our marketing mix,” shared Tim Kelly, “The successful implementation and execution of these events has helped us improve our marketing operations and has enabled us to better leverage customer case studies and internal experts, providing valuable insight and real-world results to several interested prospects at a time.”