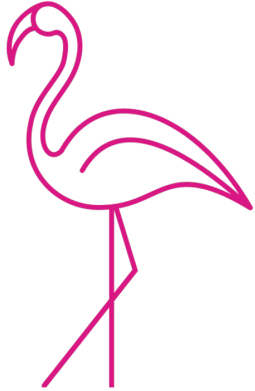


Finance5 (company name changed)

Wins ABM in Q2 2024



Winning The Future

**“Give me six hours to chop down a tree and I will
spend the first four sharpening the axe”**

Index

Finance5 Requested

1. [Recap](#)
2. [Segmentation](#)
3. [Messaging](#)
4. [Budget](#)
5. [KPIs](#)
6. [Calendar](#) / [Sequence](#)
7. [Elements](#)
8. [Email 1 copy \(ICP + funding\)](#)

Complete Email + InMail Sequence Copy

1. [Email 1 copy \(ICP segment\)](#)
2. [Email 1 copy \(ICP + role\)](#)
3. [Email 2 copy](#)
4. [Email 3 copy](#)
5. [InMail 1 copy](#)
6. [Email 4 copy](#)
7. [Observations + Recommendations](#)

Recap | [Index](#)

1] Introduction

Finance5 is about to launch an Account Based Marketing (ABM) campaign to acquire customers in the category of fast-growth technology companies.

As a Demand Generation Manager, you will be responsible for generating and nurturing leads in this vertical.

2] Target Persona's

- Office of the CFO
- Treasurer
- Assistant Treasurer
- Power user
- Data owner / Daily user
- Casual user

3] Areas to Address:

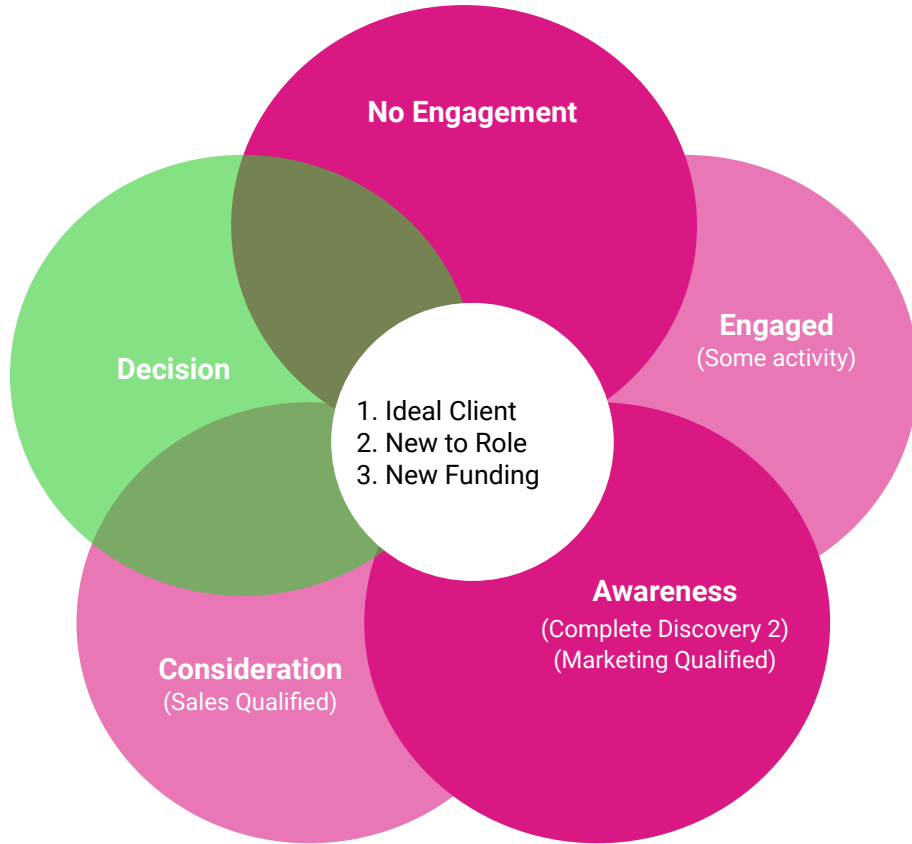
1. Outline various touchpoints in the funnel.
2. What is the plan to nurture leads and with what kind of content?
3. Define KPIs for each part of the funnel
4. What tools will you use to track and measure performance?

4] Questions

1. How you would approach the ABM campaign?
2. What is your process?
3. The various touchpoints to get leads in the funnel?

5] Goal
15 deals
in Q1

Segmentation | [Index](#)



1

Ideal Client Profile

1. **Company Intent:** Cash Management Tools, Treasury Management Software, Treasury / Cash / Risk Management

2

ICP + New to Role

1. **Company Intent:** Cash Management Tools, Treasury Management Software, Treasury / Cash / Risk Management
2. **Signals:** New to Role

3

ICP + New Funding

1. **Company Intent:** Cash Management Tools, Treasury Management Software, Treasury / Cash / Risk Management
2. **Signals:** New Funding Round

1. **Industries:** IT & Services; Computer & Network Security; Computer Hardware
2. **Titles:** CFO and Treasurer, Treasury Manager
3. **Employee's:** 21-100
4. **Location:** North America

North America Total Contacts

ICP = 2700 people / Role = 19 / Funding = 231 people

Data by [Apollo.io](#). Accessed on 2/26/24. Subject to change. Can be modified, lets collaborate!

Messaging | [Index](#)

1. ICP Segment

- a. Liquidity Management: Economic Uncertainty Continues
- b. Alternative: Liquidity Management: Acta non verba
 - i. Brewing Success with Caffeine and Cash Flow
 - ii. \$5 SBUX eGift card for first “discovery meeting”
 - iii. \$20 Doordash / UberEats eGift card for second “discovery meeting”

2. ICP Segment + New to Role

- a. Welcome to the new role.
 - i. Sip, Plan, Execute: Coffee and Strategic Liquidity Management
 - ii. \$5 SBUX eGift card for first “discovery meeting”
 - iii. \$20 Doordash / UberEats eGift card for second “discovery meeting”

3. ICP Segment + New Funding

- a. Congratulations on the new funding.
 - i. From Caffeine to Cash Flow: Celebrating Your Funding Milestones
 - ii. \$5 SBUX eGift card for first “discovery meeting”
 - iii. \$20 Doordash / UberEats eGift card for second “discovery meeting”

Budget | [Index](#)

Item	Cost	Quantity <i>(estimated)</i>	Total Cost
SBUX eGift cards <i>(unused = asset in future campaign)</i>	\$5	750	\$4000
Doordash eGift cards <i>(unused = asset in future campaign)</i>	\$20	250	\$5,500
Content modifications <i>(just in case; probably not needed)</i>	intentionally left blank	intentionally left blank	\$500
Apollo.io license	\$588	1 license / 1 year / 12k contacts	\$588
Total	intentionally left blank	intentionally left blank	\$10,588

KPIs | Index

<i>Primary KPIs to determine campaign effectiveness</i>		
Freshsales Sequence	Freshsales CRM	eGifting
<ol style="list-style-type: none">1. Open rate2. Click-through rate3. Open-to-click ratio4. Number of Meetings5. Meetings-to-click ratio	<ol style="list-style-type: none">1. Net new logos2. Net new ARR	<ol style="list-style-type: none">1. Total eGifts sent2. Total eGifts redeemed3. Total eGifts cost4. Meeting-sent ratio5. Meeting-redeemed ratio6. Net new ARR-total eGift cost ratio

<i>Secondary KPIs always aggregating in the background</i>	
Web	Freshsales CRM
<ol style="list-style-type: none">1. Total traffic this month vs Last month2. New vs Returning traffic3. Top 3 performing channels4. Top 10 performing pages	<ol style="list-style-type: none">1. Segment velocity2. Average days in segment3. Largest segment

ABM Calendar | [Index](#)

Week # / Day	<u>M</u>	<u>T</u>	<u>W</u>	<u>TH</u>	<u>F</u>
1	April 1, 2024 // Email 1 (Role + Funding Segments)		Connect on LinkedIn	Email 2 Weekend Reads	
2	Phone Call		Email 3		InMail 1
3	Phone Call			Email 4	
4	Adjust cadences based on feedback and performance				
5	April 29, 2024 //Email 1 (ICP Segment - Tranche 1)		Connect on LinkedIn	Email 2 Weekend Reads	
6	Phone Call		Email 3		InMail 1
7	Phone Call			Email 4	

Sequence | [Index](#)

WEEK 1

Email 1 | *Monday preferred* | 3 Variations to target: ICP, Job, and Funding in a Freshsales Sequence

Connect on LinkedIn | *Wednesday preferred* | LinkedIn

Email 2 “Weekend Reads” | *Thursday / Friday preferred* | Freshsales Sequence

WEEK 2

Phone Call 1 | *Monday preferred*

Email 3 “We Keep Missing Each Other” | *Wednesday preferred* | Freshsales Sequence

InMail 1 “Have a great weekend” | *Friday preferred* | LinkedIn

WEEK 3

Phone Call 2 | *Monday preferred*

Email 4 “If anything changes” | *Tuesday preferred* | Freshsales Sequence

What are Freshsales Sequences? (from [Freshworks.com](https://www.freshworks.com))

Sales Sequences are automated workflows that help your salespeople manage their outreach better. They comprise a scheduled series of sales touch points like emails, phone calls, SMSes, and reminders. With Sales Sequences, create, send, and track perfect, personalized outbound campaigns that kickstart meaningful conversations with your customers.

Email 1 copy (ICP segment + Funding) | [Index](#)

From	Account_Owner@Finance5.com	
Subject	From Caffeine to Cash Flow: Celebrating Your Funding Milestones	<p>Notes:</p> <ol style="list-style-type: none">1. From is the Account owner2. Greeting: Hi [first.name],3. Signature: [Account.owner.full.name] [phone.number] [calendar.link] [on-demand.demo] <ul style="list-style-type: none">• \$5 SBUX eGift Card to complete Discovery call 1• \$20 Doordash / UberEats to complete Discovery call 2• CTA = Schedule a meeting
Body	<p>Congratulations on reaching this exciting milestone of securing new funding for [Company Name]!</p> <p>Amidst the backdrop of economic uncertainty, it's more crucial than ever for companies to optimize their efficiency and financial agility. Let's seize this opportunity to strategize and ensure that your funding is maximized to its full potential.</p> <p>Join me for a coffee chat where we'll delve into the complexities of managing and forecasting liquidity at a high-growth company. Together, we'll explore the challenges they pose and the opportunities they present, all while celebrating your funding milestones.</p> <p>What day this week would work best for you to connect and discuss further?</p> <p>Looking forward to brewing success together in 2024!</p>	<p>Double check new funding before sending</p>

Elements | [Index](#)

MarTech

1. Freshsales Sequences
 - a. Calendar sync needs to be connected.
2. Apollo.io
3. Tango (free platform for eGifting distribution)
4. Zapier (Integration platform - free version available)

Content

1. Finance5 fact sheet (landing page)
2. Ca\$hCa\$h® fact sheet (landing page)
3. Additional content on-demand

Complete Email + InMail Sequence Copy

Finance5:

Benjamin: BONUS on slide 20!!!


Email 1 copy (ICP segment) | [Index](#)

From	Account_Owner@Finance5.com	
Subject	Brewing Success: Navigating Caffeine & Cash Flow in 2024.	<p>Notes:</p> <ol style="list-style-type: none">1. From is the Account owner2. Greeting: Hi [first.name],3. Signature: [Account.owner.full.name] [phone.number] [calendar.link] [on-demand.demo] <ul style="list-style-type: none">• \$5 SBUX eGift Card to complete Discovery call 1• \$20 Doordash / UberEats to complete Discovery call 2• CTA = Schedule a meeting
Body	<p>Economic uncertainty continues to loom large, casting a shadow over our financial landscape.</p> <p>With whispers of an impending economic downturn, the need for companies to maximize efficiency is more pressing than ever.</p> <p>Let's discuss into the complexities of leading liquidity indicators, exploring both the challenges they pose and the opportunities they present, while enjoying a cup of coffee on me.</p> <p>What day this week would work best for you</p> <p>Brewing Success together in 2024!</p>	


Email 1 copy (ICP segment + Role) | [Index](#)

From	Account_Owner@Finance5.com	
Subject	Sip, Plan, Execute: Coffee and Strategic Liquidity Management	<p>Notes:</p> <ol style="list-style-type: none">1. From is the Account owner2. Greeting: Hi [first.name],3. Signature: [Account.owner.full.name] [phone.number] [calendar.link] [on-demand.demo] <ul style="list-style-type: none">• \$5 SBUX eGift Card to complete Discovery call 1• \$20 Doordash / UberEats to complete Discovery call 2• CTA = Schedule a meeting
Body	<p>As you embark on your new role, navigating through the current economic landscape may seem daunting. However, with the right strategies in place, we can turn challenges into opportunities.</p> <p>Join me for a coffee chat where we'll delve into the complexities of strategic liquidity management. Together, we'll explore leading indicators, discussing both the challenges they pose and the opportunities they present.</p> <p>Let's sip on some coffee while we strategize for success. What day this week would work best for you?</p> <p>Looking forward to brewing success together in 2024!</p>	<p>Double check new role before sending</p>

Email 2 copy | [Index](#)

From	Account_Owner@Finance5.com	
Subject	 Weekend Reads: Brew Success w/ Liquidity-Fueled Insights!	<p>Notes:</p> <ol style="list-style-type: none">1. From is the Account owner2. Greeting: Hi [first.name],3. Signature: [Account.owner.full.name] [phone.number] [calendar.link] [on-demand.demo] <ul style="list-style-type: none">● \$5 SBUX eGift Card to complete Discovery call 1● \$20 Doordash / UberEats to complete Discovery call 2● CTA = Schedule a meeting● Red text = placeholders
Body	<p>As the weekend approaches, it's the perfect time to unwind with a cup of coffee and dive into some thought-provoking reads. With that in mind, I wanted to share some insightful articles that resonated in recent conversations about maximizing efficiency and navigating financial landscapes.</p> <ol style="list-style-type: none">1. "The Art of Strategic Planning Over Coffee" - Discover how leading companies are leveraging strategic liquidity management to thrive in uncertain times.2. "Caffeine Chronicles: Fueling Productivity in Finance" - Explore the science behind caffeine consumption and its impact on financial decision-making.3. "Weekend Wisdom: Balancing Growth and Stability" - Gain valuable insights on striking the right balance between expansion and risk management. <p>I hope you find these articles both inspiring and informative as you embark on your journey towards success. Should you have any questions or wish to further discuss how we can support your enterprise liquidity management goals, feel free to reach out.</p> <p>Looking forward to brewing success together, one coffee and insightful conversation at a time!</p>	


Email 3 copy | [Index](#)

From	Account_Owner@Finance5.com	
Subject	 Let's Catch Up Over Coffee!	<p>Notes:</p> <ol style="list-style-type: none">1. From is the Account owner2. Greeting: Hi [first.name],3. Signature: [Account.owner.full.name] [phone.number] [calendar.link] [on-demand.demo] <ul style="list-style-type: none">● \$5 SBUX eGift Card to complete Discovery call 1● \$20 Doordash / UberEats to complete Discovery call 2● CTA = Schedule a meeting
Body	<p>Just a quick note to say that we keep missing each other! Let's remedy that over a cup of coffee and some meaningful conversation.</p> <p>I'm available [suggest a couple of dates and times], or feel free to suggest a time that works best for you.</p> <p>Looking forward to connecting and brewing up some success together!</p>	

InMail 1 copy | [Index](#)

From	Account Owner @ Finance5 LinkedIn Profile	
Body	<p>Hi [Recipient],</p> <p>As we head into the weekend, I wanted to reach out and see if we could connect over coffee next week. It seems we've been missing each other, and I'd love to chat about how we can brew up some success together.</p> <p>Are you available for a quick chat next week?</p> <p>Looking forward to catching up!</p>	

Email 4 copy | [Index](#)

From	Account_Owner@Finance5.com	
Subject	 Let the Conversation Keep Brewing!	Notes: <ol style="list-style-type: none">1. From is the Account owner2. Greeting: Hi [first.name],3. Signature: [Account.owner.full.name] [phone.number] [calendar.link] [on-demand.demo]<ul style="list-style-type: none">• \$5 SBUX eGift Card to complete Discovery call 1• \$20 Doordash / UberEats to complete Discovery call 2• CTA = Schedule a meeting
Body	<p>I hope this email finds you well. I wanted to touch base and express my regret that we haven't had the chance to connect yet.</p> <p>If any time opens up on your schedule to chat about finance and liquidity management, I'm here and ready to dive into the discussion over a cup of coffee.</p> <p>Looking forward to the opportunity to connect soon!</p>	

Observations + Recommendations | [Index](#)

Casual Observations

1. Informal content plan
 - a. written
 - b. video
 - c. client
 - d. + use conference sessions as a springboard for content plan
2. Informal sales & marketing segments
 - a. + Opportunity to build reporting from ground up
 - b. + ABM + Digital campaign would feed this data
3. Informal KPI reporting
 - a. + ABM + Digital campaign would feed this data
4. Informal marketing and PR strategy
 - a. + Series A is a good time to add intentionality into both.

Recommendations

- Navigate through the marketing audit process. It comprehensively identifies gaps, highlights successful strategies, and ensures measurability as well as documenting all actionable go-to-market assets.
- Empowered with information, we then enter Strategic Planning, taking a particular look at current scheduled speaking topics, and how to expand their reach. Fill gaps, meet agencies, build your digital and content plan.
- Marketing campaigns exist at the intersection of Content and Segmentation. Over the next few weeks, together we can make sure Finance5 has a strong start to Q2 2024.

3/4/24

Begin Marketing Audit

- Audit sales & marketing assets
- Document sales & marketing outcomes
- What is working and what is not?
- Define sales & marketing baseline KPIs
- Define segments
- Define & start to track keywords

3/18/24

Begin Strategic Planning

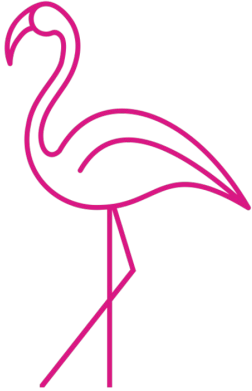
- Current speaking schedule & topics
- How can those be expanded?
- Meet & Greet with agencies
- Fill any MarTech gaps
- Build dashboard (single source of truth)
- Build digital & content plan

4/1/2024

Start Q2 Strong

- Activate digital plan
- Activate content plan
- Remaining programs phased on
- Happy selling & data gathering
- Bi-weekly "tuning meetings"

Wow, Thats Fantastic!



WTF

Winning The Future. This spin on the acronym aligns with the dynamic and ever-evolving nature of marketing strategies. To succeed in the competitive landscape, businesses need to continuously adapt, innovate, and embrace emerging trends.

WTF becomes a mantra for staying ahead, captivating audiences, and ultimately, winning the future market share.

It's a reminder that in the world of marketing, success often comes from boldly navigating the unexpected and creating campaigns that make people say, "Wow, that's fantastic!"

Ben@cwgs.wtf // (732)221-8599