

Driving strategic sales planning for a European fintech events company



- **Account planning**
- **Pre-engagement support**
- **Strategic due diligence**



Business need

- A leading European fintech events company was looking to drive a strategic and structured sales planning process for its networking platform.
- It needed support in carrying out due diligence of its key growth accounts that would feed into its overall account plan.
- The focus categories of the existing set of clients under consideration included banking, payments, fintech and technology.

To develop a robust sales growth plan for the client's key growth accounts.

The client outlined two key reasons for selecting RocSearch:

- Our ability to rapidly deploy customised teams with the necessary skills.
- Our flexible client-centric engagement models.

Approach & Methodology

- We conducted extensive targeted research, by focussing on payment solution offerings of the in-scope companies and created insightful business profiles of each account.

Each sales account profile covered operational and financial highlights of the company, its market share, customers and partners, funding rounds, IPO, share price performance and recent M&A activity with strategic focus on developing new service offerings.



- We also mapped out key stakeholders to be targeted for outreach in financial services/payments teams, marketing (chief marketing officer), in addition to chief innovations officers, heads of products, heads of strategy & partnerships.
 - We conducted a detailed analysis of industries that provide similar payment solutions or cater to payment support services. It involved identifying and shortlisting leading firms that provide fintech services and emerging start-ups providing payment services
- We examined the competitors' activities, studied their payment ecosystems in depth and captured key M&As, investment activities undertaken by them and recent developments in the cryptocurrency market.

Business outcomes

- The sales account profiles provided several sales triggers to the client such as launch of new offerings, fund raising for business growth, expression of interest in exploring partnerships for new product development and digitisation in payments business.
- These insights enabled the sales team to create an overall account plan.

The study provided several sales triggers to the sales team, which acted as building blocks for their overall account planning.

About RocSearch

Founded in 1999, RocSearch has been a pioneer in empowering our clients to overcome challenges and realize their goals. Our strength is delivering research and advisory solutions through managed and dedicated teams that produce the expert intelligence our clients require to gain a true competitive advantage.

We draw on proven expertise to deliver consistent value across all types of business requirements: ranging from digitization and analysis of business, financial, or customer data to the provision of 'act-on' insights for the most challenging business problems.

Our longstanding client relationships bear testament to the enduring value we create, alongside our consistent reliability and absolute discretion. We take great pride that many of the brightest global companies rely on us to help them achieve top-line growth, operational efficiency and increased profitability.

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