

Tactics for introducing an insights and reporting service offering to clients and prospects

- Leverage demo company views to showcase it to your client
- Wrap the software up as part of a broader service offering
- Use a floating licence to upsell
- Incorporate an MI-Lite report as part of your annual meeting with a view to upgrading
- Use marketing techniques to make people aware of the offering (emails, social campaigns, joint webinars).

Tip 1: Involve the wider team to help you introduce/sell the offering

Tip 2: Have regular team meetings to cover off key wins, challenges and opportunities

CHECKLIST

- Have you segmented your clients?
- Do you have a current process for introducing MI to existing clients and new prospects?
- Does your process include a regular review with the team to share wins, challenges and general feedback?
- Do you advertise the MI service offering on:
 - Website
 - Social Media
 - Email Campaigns
 - Printed Collateral
- Do you have a case study of how your MI offering helped an existing client?



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