

TERRY FORSEY CONSULTING GREW 50% IN FIRST YEAR WITH ACT-ON

In 2012 the UK-based specialist software marketing consultancy Terry Forsey Consulting had reached a point where their marketing services were growing and their client portfolio was expanding. While the increase in business growth was great for them, it also posed a problem. They'd been using a collection of specialized marketing tools to manage their own campaigns and programs. Over time, the difficulty of coordinating multi-channel programs and disparate tools grew, and they felt it was hampering the ability to scale the business.

"We used to have disjointed tools for email marketing, analytics, CRM, social, and the website," said Terry Forsey, Managing Director of Terry Forsey Consulting. "Nothing was properly integrated. We were the masters of multiple logins, importing and exporting data, and cutting and pasting to join things up. To be honest, the tools had become a hindrance rather than a help."

The consultancy offered a range of services, including lead generation and marketing strategy, but wasn't able to manage these activities on behalf of their clients. "We were all the time compromising what we were doing," said Terry.

When they stepped back and looked at their intricate mix of internal systems, it was obvious that they needed to find a better solution if Terry Forsey Consulting was to grow.



Terry Forsey Consulting delivers techniques, expertise, and processes to grow sales and boost profitability for small to medium software businesses. The consultancy pulls from in-house marketing knowledge and expertise, combined with revolutionary marketing automation tools, to offer consulting, marketing, and turnkey lead-generation-managed services that create qualified sales-ready leads.

The Search to Simplify

The team began to look for a marketing automation solution that they could use in-house and also recommend with confidence to their clients, who are predominantly smaller owner-managed software companies. Their initial goals were to save time, streamline processes, and provide a coherent view into the consultancy's own multi-channel marketing efforts.

"We wanted an integrated marketing solution that would enable us to master the world of inbound marketing, but it had to suit the small and medium business (SMB) market space," said Terry. "We started out looking not at any particular solution, but at the market in general. HubSpot was very, very prevalent in the marketplace. They were very strong in terms of promoting their brand. They had a lot of quality collateral. But the platform was very expensive; we just couldn't see the return on investment."

They looked at a number of other alternatives, including Marketo, but found what that company touted as a "small business edition" was in fact just a stripped-down version of their enterprise platform. Terry noted, "All of the useful bits were taken out. No analytics, no reporting, barely fit for purpose."

It was about this time that they discovered Act-On. "Act-On was unique in offering a complete solution at a fixed price, with all the components integrated into one solution," said Terry. "The pricing model was attractive to us. We decided that Act-On was a viable, affordable solution, and we chose it."

Creating a Managed Lead Generation Practice

Soon after adopting Act-On, the firm realized that a high-performance marketing automation system exposed two problems for their clients:

1) The new world of inbound marketing needs lots of relevant, compelling, fresh content. Their clients, while technical

gurus, usually lack the capabilities and relevant skills inhouse to produce a regular program of well-written content to engage potential customers.

2) Marketing automation drives a positive and valuable step change into a business.

The challenge for smaller businesses is combining management commitment and marketing resources to successfully manage the entire process, resulting in qualified sales leads. Many clients would struggle to commit the right level of resources.

Then the light bulb went on: Terry realized this could be a new business opportunity.

"Act-On was not going to be just a tool for us, but a major new revenue opportunity for us as a business," said Terry. "To successfully deliver Act-On's marketing automation capabilities to our clients we needed to provide the services to do this for them. In short, we needed to harness our in-house marketing knowledge and expertise with Act-On's marketing automation software. This would enable us to deliver a complete lead-generation-managed service that can help software businesses



Delivering managed services to clients using Act-On gives two key benefits: One, it makes the relationship much stronger. And secondly, it delivers an integrated and quantifiable sales and marketing approach to the client.



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Managing Director
Terry Forsey Consulting

manage the entire sales and marketing process – and generate sales-ready leads.”

They came up with an integrated sales and marketing methodology which delivers a complete process from targeting, engaging, nurturing, and qualifying a potential customer, to generating highly qualified sales leads.

“We now take the complete marketing process from our clients, and deliver sales-ready leads into their CRM,” said Terry. “Most of our customers don’t need marketing automation – because we’re using Act-On for them. We are their fully automated marketing service.”

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CRM Integration a Must-Have

Having a platform that works with multiple CRMs was an absolute requirement. Although the majority of their clients use Salesforce, others employ CRM platforms such as Sugar, or have homegrown systems, or have none defined at all. “When the client comes to us with a CRM that they’ve already got in place, then we will work with that CRM,” said Terry. “The starting point of the whole conversation is: What is the problem we’re trying to solve here? What are you trying to set as a goal at the end of this project? And what have you got in terms of tools that we need to interface to? Act-On’s ability to integrate with these CRM systems gives the consultancy

the flexibility it needs to work closely with each client in their own preferred system.”

Act-On Enables Delivery of Services Globally

While Terry Forsey Consulting has always delivered consulting services internationally, the Act-On platform has enabled them to scale and expand their services, too. “We’re delivering marketing services internationally now, which we were never really doing on a large scale before. It just seemed very difficult to do,” said Terry. “But with Act-On, once we’ve got the services defined, and once we’ve got the processes defined, it doesn’t matter if Australia is asleep during our day or we’re asleep during theirs.”

The ability to schedule, trigger, and automate content delivery has allowed them to work efficiently in every time zone around the globe.

Terry Forsey Consulting Grew 50% Year-Over-Year

Terry Forsey Consulting went live with Act-On on January 1, 2013. During that first quarter the consultancy began to slowly but steadily turn off the other tools. “We were negotiating with clients to start delivering some services based on Act-On. And we were gradually reengineering our own business,” said Terry. “I think it’s fair to say that our business today has grown 50 percent from this time last year.” The results speak for themselves. After launching the Act-On platform, Terry’s business grew 50 percent in one year.

About Act-On Software

Act-On Software is a marketing automation company delivering innovation that empowers marketers to do the best work of their careers. Act-On is the only integrated workspace to address the needs of the customer experience, from brand awareness and demand generation, to retention and loyalty. With Act-On, marketers can drive better business outcomes and see higher customer lifetime value. The Act-On platform provides marketers with power they can actually use, without the need for a dedicated IT resource.

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