



# How RSW/US Helped a NYC-based Social Media Agency Close with a 200+ Location Regional Bank



CASE STUDY



## Agency Profile

NYC-based social media agency that drives meaningful engagement between brands and consumers.

Works with B2C and B2B brands across multiple verticals



## Prospect Profile

A regional bank company with 200+ locations in metro NYC and the southeast.

Offers basic consumer deposit products, home financing, wealth management, and comprehensive commercial services and solutions.

# The Challenge

- Prior to engaging with RSW/US, this agency's primary new business vehicle, referrals, was slowing.
- As with so many agencies, no one was dedicated to new business development internally, no formal process to diversify prospecting existed, and too large a percentage of billings was represented by a few key clients.
- Our client wanted a better strategy and approach for continuous growth.

# The Process

Every RSW/US Program Contains:



### Value-Driven Prospecting

Each client has a tenured New Business Director (NBD) with 15-20 years' experience in sales and marketing. Ongoing, value-based, and consistent exposure to prospects is part of every program



### Database Development

We are firm believers in combining human intelligence with technology to build lists – one company at a time and one prospect at a time. We meticulously and strategically develop each list.



### Tech Stack

Our tech stack is an integral part of every client program, from database creation to ongoing prospecting efforts. We pride ourselves in ongoing reviews of current technologies/platforms.



### Ongoing Content

Our MarCom team audits client content assets prior to program start, and make recommendations for additional content ideas they would like to see developed, working with your team to implement those ideas.



### Multi-platform Prospecting

We know successful programs must include multiple mediums used in concert with each other, including phone, email, social media, direct mail and technology in order to break through effectively.

# The Path To Success

Because our client's positioning was so broad, we thought it important to target one area of strategy and opportunity with certain segments our client hadn't focused on previously. The RSW/US team further refined the list by identifying prospect companies with a social media presence that could be improved.

Targeting a key group of prospects every 4-5 weeks, the RSW New Business Director (NBD) was able to focus her research, unearthing news that a mid-sized regional prospect was expanding. The NBD reached out to speak to what improving their nearly nonexistent social media presence could mean to the bottom line.

However, as the financial space is notoriously difficult to break into using email, the NBD also relied on an under-appreciated agency new business channel: the phone. She left concise VMs to further convey relevant social media insights. Little did she know that the VP of Marketing was forwarding these messages to their team as examples of what they could be accomplishing. After more than a dozen touches were made over 7 months, the NBD secured a meeting for our client.

On average, a new business director lasts 18 months.

RSW new business directors have an average tenure of 8 years.



Our client closed an initial **\$150K** piece of business, with work ongoing.

## Contact:

Lee McKnight  
VP Sales  
513.559.3111  
lee@rswus.com

***RSW/US is an outsourced agency lead generation and new business development firm that works exclusively with marketing service companies to find and win new business.***

***We help agencies by better positioning them in the market, finding qualified leads, setting meetings and helping move them closer to close.***