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### **Omgeo Company Overview**

Omgeo LLC is the leading provider of complete global trade management services, processing over one million trades per day and serving 6,000 broker-dealers, custodians and investment managers in more than 40 countries.

A unique partnership between the securities industry's leading utility and the commercial sector, Omgeo is industry-backed and market-oriented. Through its integrated suite of Intelligent Trade Management Solutions, Omgeo helps its clients move from traditional methods of trade processing to new unified solutions for trade management. Omgeo provides clients with a managed transition to a new and more efficient way of processing trades and reducing risk and costs while safeguarding existing technology investments.

### **The Campaign**

Omgeo's objectives were to launch a new product to the market place for small investment managers. They were looking to run a programme with the larger brokers and dealers and all wanted to target the same small investments managers. They also needed to generate leads and wanted to do this in a cost effective way.

Omgeo decided to use telemarketing as this would be the best way to reach their target audience and would be a low cost of sale. They researched a variety of telemarketing agencies, including Fizz Biz from whom they had received a direct mail piece. Fizz Biz won the contract.

"We decided on Fizz Biz because we liked the people." Said Malcolm Pobjoy, director of strategic business development. "They were also office based which meant we could pop into their office and see the whole operation. Fizz Biz was happy for us to be completely hands on and this provided a level of comfort. They also had excellent references."

The total campaign was for 14 days and would be run over a period of 3-4 weeks. The aim was to follow up on a direct mail piece that they had run which involved three mail drops. The larger brokers and dealers they were working with, had

nominated the targets selected. As this was a new market place speaking to the correct contact would be challenging. They provided the data though once calling had commenced it became clear the quality was less than good.

Fizz Biz continued to contact the investment managers – they identified who the correct target was and educated them on Omgeo's offering. Fizz then sent out the appropriate collateral and where possible gathered information on the company and key contacts.

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### **The Results**

Fizz Biz positive approach got results. We made 671 calls and secured 15 appointments with key contacts. We also got a further 4 hot leads and over 10 further potential leads. It was decided that we should undertake a further two days calling to follow up on these hot prospects we had found. Omgeo also gave us a specific list of a further 30 key targets – this generated an additional 7 appointments.

Malcolm Pobjoy said, "We were very happy with the outcome of this campaign. The aim was to generate leads and increase awareness and on both counts this was successful." He added, "As this was our first attempt using telemarketing we learnt a lot more than anticipated and will use this knowledge for future campaigns. I felt we got great value for money and the whole team were great, enthusiastic and fully engaged in the project."

