



# A \$200 Marketing Test That Rewrote a Company's Sales Process

A low-risk direct mail pilot didn't just generate leads — it exposed a broken demo process and drove lasting cross-functional change.

Valentine's Day 2018 · IDEA Data Analytics Training Campaign

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#### THE CONSTRAINT

# \$200

The entire test budget. No advertising spend. No safety net.

#### THE CHALLENGE

## Convert inherited leads by letting them experience the software — not just hear about it

- I had a book of inherited leads and prospects who hadn't converted. The goal was to **increase my own sales** — not drive registrations for the training itself.
- The free IDEA training program already existed and was typically used by new or existing clients. I repurposed it as a **use-case experience for prospects** — letting them see the software solve real challenges.
- This approach proved more effective than the standard sales presentation, which walked through **software functionality** rather than addressing the **specific challenges** that led prospects to seek out auditing software in the first place.

# I owned the campaign end to end — strategy through follow-up

## 01 Strategy

Framed the pilot, set the target audience, and built the case for approval.

## 02 Creative

Developed the direct-mail creative and the messaging across every touchpoint.

## 03 Execution

Ran mail, email, and landing pages, timing delivery around Valentine's Day.

## 04 Coordination

Aligned Sales on follow-up and connected feedback back into the process.

Led campaign strategy, creative development, execution, and cross-functional coordination.

# A multi-touch engagement path, launched on a holiday for visibility



WHY THE TIMING MATTERED

Delivering around Valentine's Day gave the piece a reason to be opened and cut through the inbox instead of competing with it.



## LISTENING BEAT THE BUDGET

# Prospect feedback exposed a gap that had nothing to do with marketing

Mowery & Schoenfeld was a lead that had gone cold the prior year but took us up on a **customized demo**. The next step surfaced a real problem: **Sales alone couldn't answer the technical and customization questions** that decided the deal.

The same outreach also revealed **significant CRM data-quality issues** — outdated and inactive contacts quietly degrading every future campaign.

# One lost deal reshaped how the whole team demos

BEFORE

**Sales-only demos**

- A single salesperson fielded every question.
- Technical and customization questions stalled the conversation.
- Client confidence dropped when answers had to wait.

AFTER — ADOPTED AS STANDARD

**Cross-functional demos**

- Subject-matter experts and programmers join Sales in the room.
- Technical questions get **real-time answers**.
- Client confidence rises, and this became the team's default practice.

**Recommendation adopted:** the cross-functional model became standard practice. The trade-off — more people per demo — was worth the lift in win confidence.

# A \$200 test returned outcomes across marketing, data, and sales

DEMAND

**Registrations & qualified engagement**

The pilot delivered greater visibility for the free online training and leads further along in the buying process.

DATA

**A cleaner prospect database**

We launched a cleanup effort that raised the value of every future marketing effort.

PROCESS

**A new demo standard**

Cross-functional demos with SMEs and programmers became the team's default.

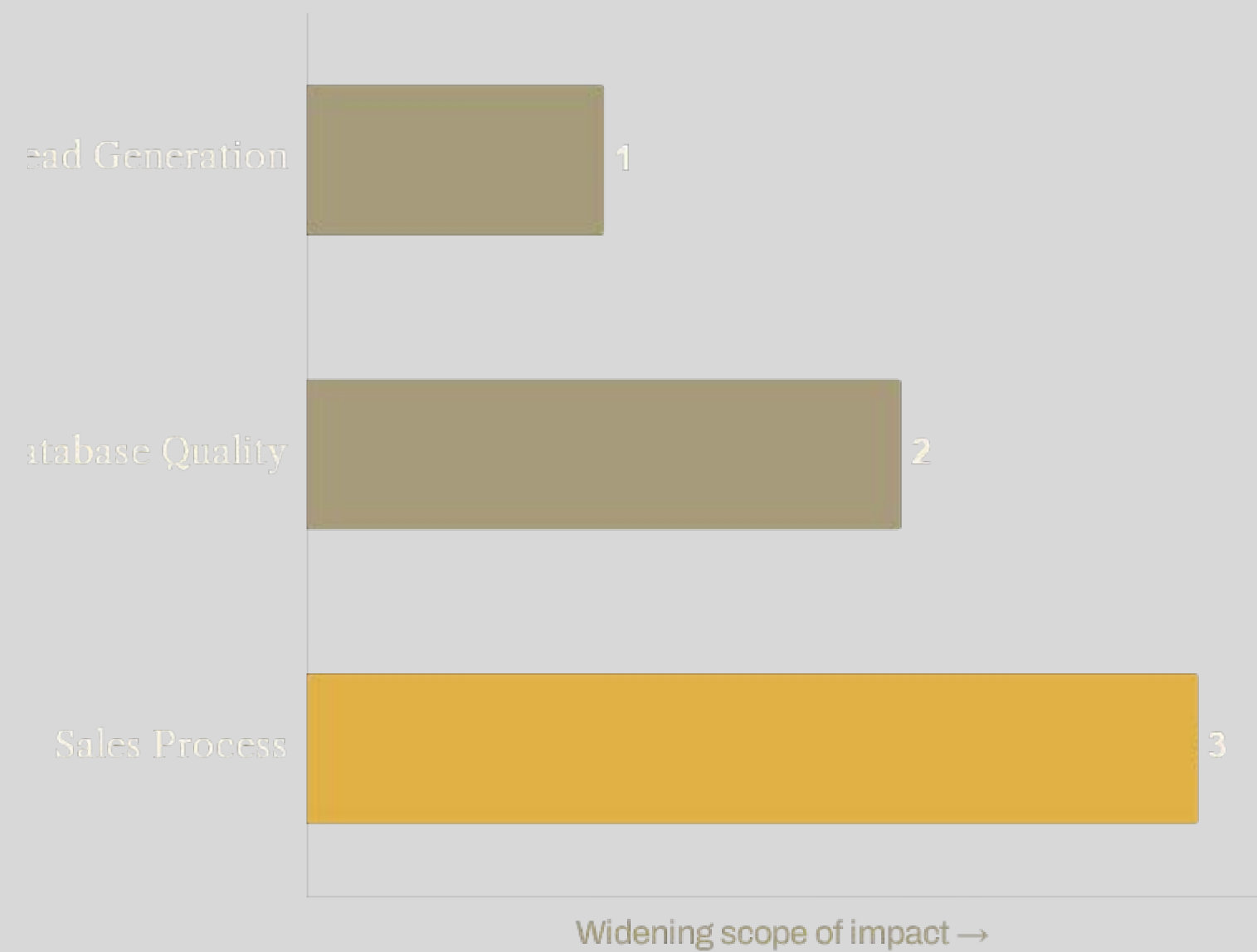
REACTIVATION  
STORY

**A dormant lead came back to the table**

Mowery & Schoenfeld re-engaged, requested a customized demo, and moved into the "home stretch" of a promising opportunity.

Source: Campaign case narrative & sales follow-up correspondence, Feb–Apr 2018. Qualitative outcomes as reported; no figures beyond the \$200 test budget were stated.

# Small input, layered return — value grew well past the campaign



## The scope widened at each stage

A \$200 lead-generation test became a company-wide process improvement because the campaign was treated as a listening tool, not just a promotion.

- **Lead generation** — the original, narrow goal.
- **Database quality** — a fix that improves every future effort.
- **Sales process** — a permanent change to how deals get demoed.

Bars show the relative *breadth of organizational impact* at each stage, qualitatively ordered from the source narrative — not a measured metric.

## KEY TAKEAWAY

# I don't run campaigns to generate clicks. I run them to find out what the business needs to change.

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A \$200 test evolved into a broader improvement initiative because I listened to customer feedback, named the process gap, and drove long-term organizational change alongside marketing results.

**What I'd bring to this role:** a marketing leader who treats every program as a source of insight, connects the dots across functions, and turns small bets into lasting change.

