

A low-angle, upward-looking perspective of several modern skyscrapers with glass facades, reaching towards a bright blue sky with scattered white clouds. The buildings are arranged in a circular pattern around the center of the frame, creating a sense of height and architectural grandeur.

Building Sales funnels in Corporate Finance

James Moore
Converta

CONVERTA

A specialist lead generation agency that opens high quality sales opportunities and helps close more new business for the world's most powerful brands.



Easy-to-use email and social media marketing, data and pipeline management, CRM and dashboard tools that enable sales and business development



CONVERTA

A decorative graphic in the top-left corner consisting of several concentric, curved lines in shades of light green and light blue, sweeping from the top-left towards the center.

Data to DEFINE

Digital to NURTURE

Dialogue to ACTIVATE

Technology to MEASURE and MANAGE

Sales growth is in our DNA

A decorative graphic in the bottom-right corner consisting of several concentric, curved lines in shades of light green and light blue, sweeping from the bottom-right towards the center.

Considerations when building a NEW sales pipeline

What sort of business do you want?

How do you identify it?

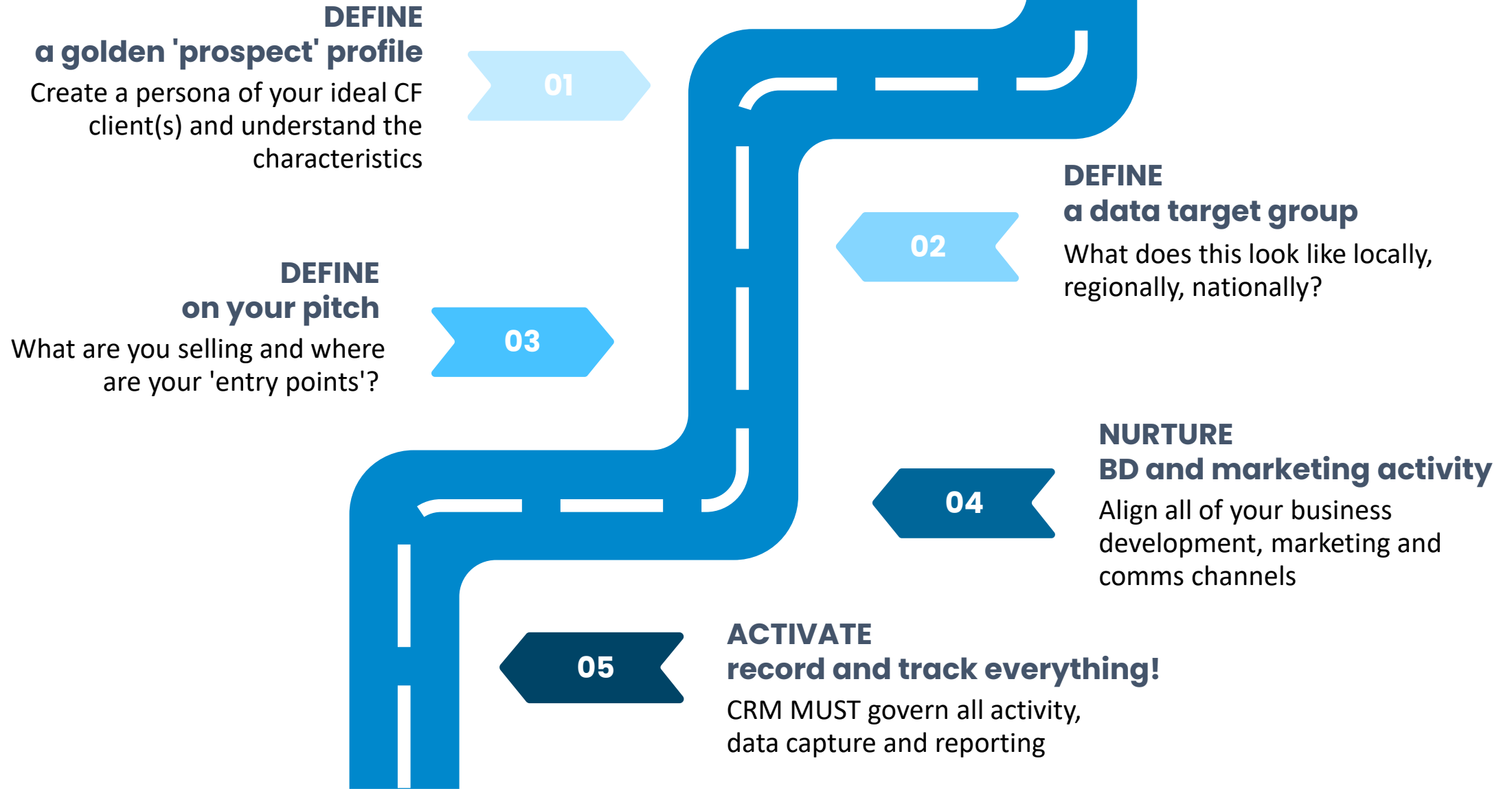
How do you reach and engage with it?

How long will it take to realise the investment?

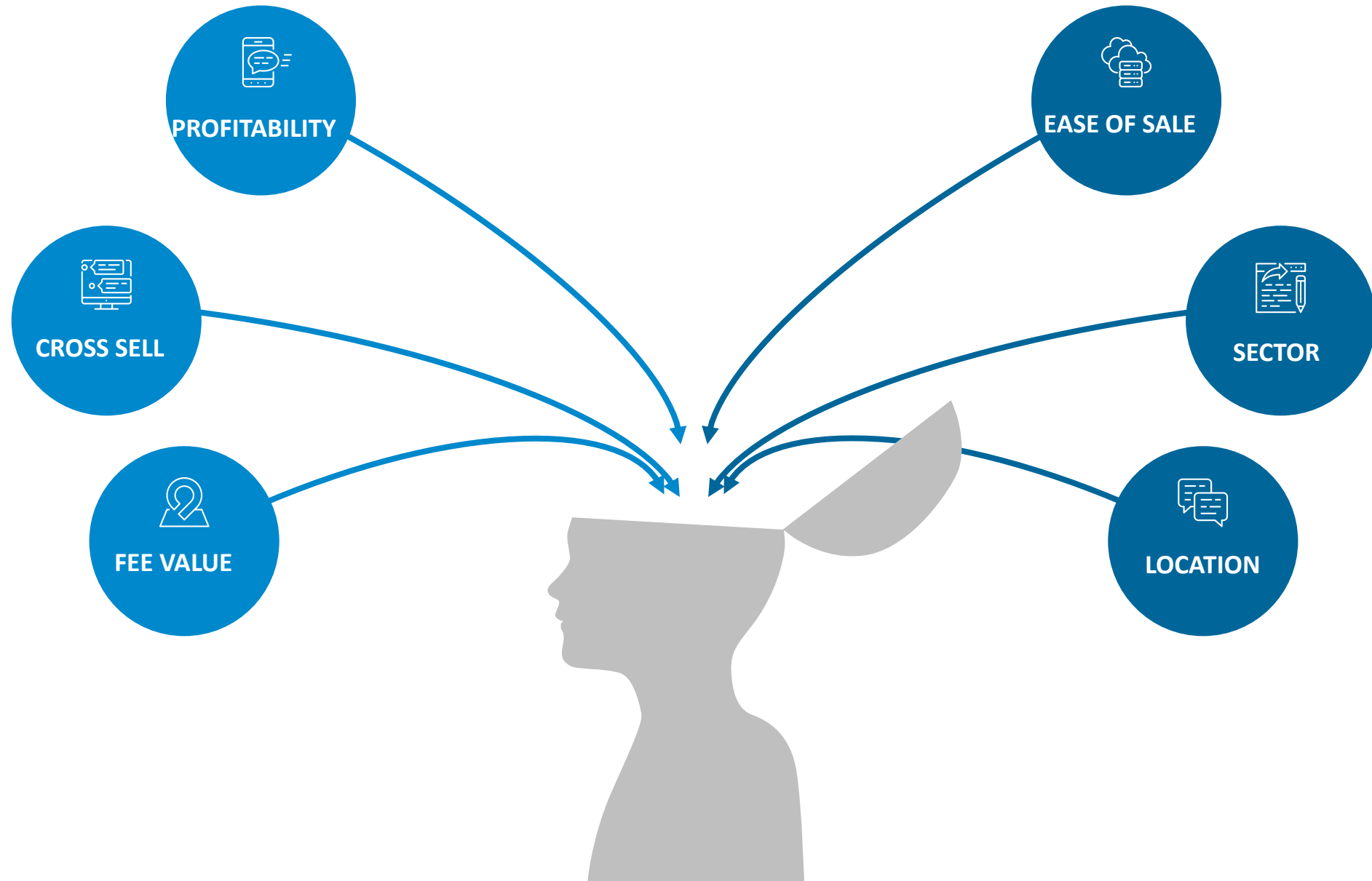
So where do
you start?



The Business Development Roadmap



DEFINE your perfect client



PREQIN

redflagalert

experian™

dun & bradstreet

Beauhurst



DEFINE your
target market



DEFINE your
audience and
understand
their **motivations**

Create shareholder profiles and overlay on your target companies

- ***Young entrepreneurs*** – on their way up
- ***Business butterflies*** – serial entrepreneurs
- ***Nearly deads*** – coming to the end of their careers (age and history)
- ***Flatliners*** - should be retired by now (family firms)

DEFINE your entry point

If the SPA is the end point, where do you start? Focus on 'readiness' services

- Business planning
- Exit planning
- Raising finance
- DD
- Taxation
- Valuations

Get your marketing in order before you start



WEBSITE



LINKEDIN
PROFILES



CONTENT
GENERATION



CASE STUDIES



TESTIMONIALS



REVIEWS



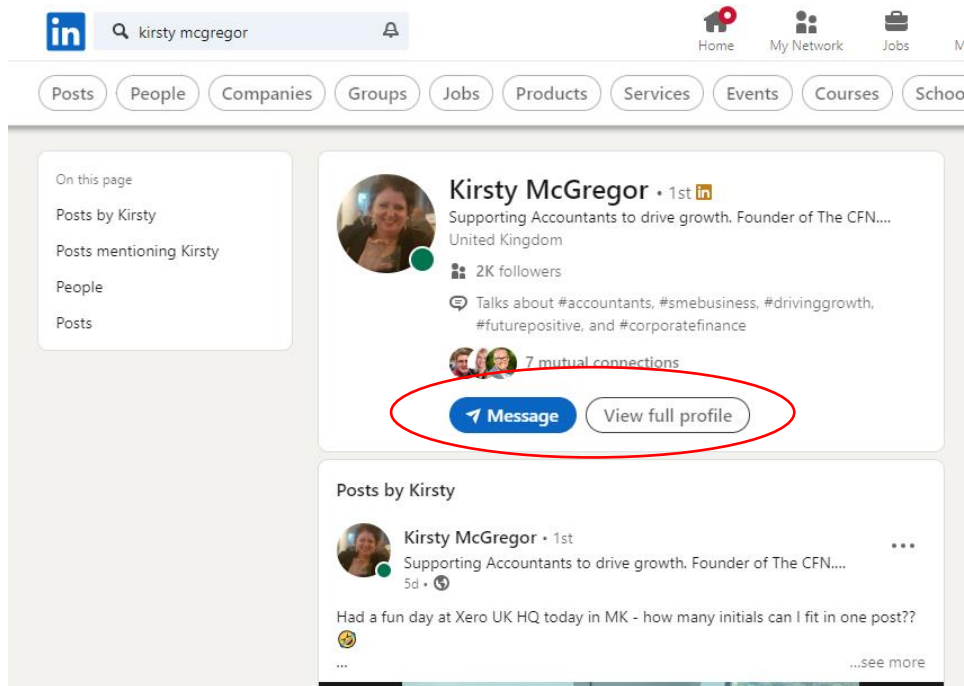
Time to be
proactive

- Use **digital** to reach out
- Use **dialogue** to engage
- Use **technology** to capture and record all activity (good and bad)
- Build a **pipeline** of warm contacts
- Be **consistent** in all activity
- Be **realistic** about outcomes



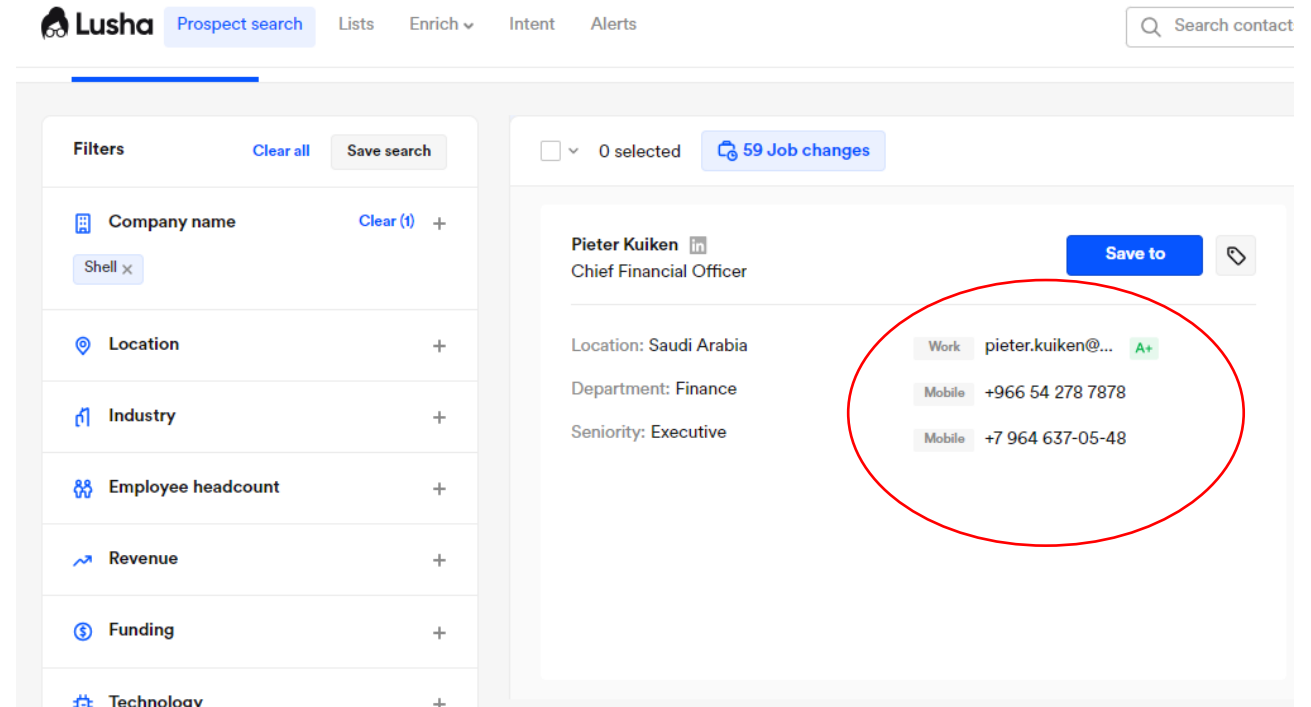
So, now what? You've identified businesses that look like 'a perfect match'

Do your homework



The image shows a LinkedIn profile for Kirsty McGregor. The profile is for a 1st-degree connection. It includes a profile picture, a cover photo, and a bio: "Supporting Accountants to drive growth. Founder of The CFN... United Kingdom". It also shows "2K followers" and "7 mutual connections". A red circle highlights the "Message" and "View full profile" buttons. Below the profile, there are posts by Kirsty, including one from 5 days ago about a day at Xero UK HQ.

LinkedIn search results for "kirsty mcgregor". The profile shows Kirsty McGregor, 1st degree, Supporting Accountants to drive growth. Founder of The CFN... United Kingdom. It lists 2K followers and 7 mutual connections. A red circle highlights the "Message" and "View full profile" buttons. Below the profile, there are posts by Kirsty, including one from 5 days ago about a day at Xero UK HQ.



The image shows the Lusha prospect search interface. It includes a search bar with "Search contact" and a "Prospect search" button. Below the search bar, there are filters for Company name, Location, Industry, Employee headcount, Revenue, Funding, and Technology. The results show a profile for Pieter Kuiken, Chief Financial Officer, with a "Save to" button. A red circle highlights the contact information: Work email (pieter.kuiken@...), Mobile phone (+966 54 278 7878), and another Mobile phone (+7 964 637-05-48).

Lusha Prospect search interface. Search bar: Search contact. Filters: Company name (Clear (1)), Location, Industry, Employee headcount, Revenue, Funding, Technology. Results: Pieter Kuiken, Chief Financial Officer. Contact information: Work (pieter.kuiken@...), Mobile (+966 54 278 7878), Mobile (+7 964 637-05-48). A red circle highlights the contact information.



Start the outreach



Right company – your
prospect pool



Right person –
shareholders/manager



Right channel –
LinkedIn, email, phone



Right content – proof
points



Don't be
corporate,
be personal

"Dear James, I came across your profile,
because I've just helped to sell a business
that looks very similar to yours.

And made the owners very wealthy.

Would you be interested in have a chat
about how we could help you?"

Be committed

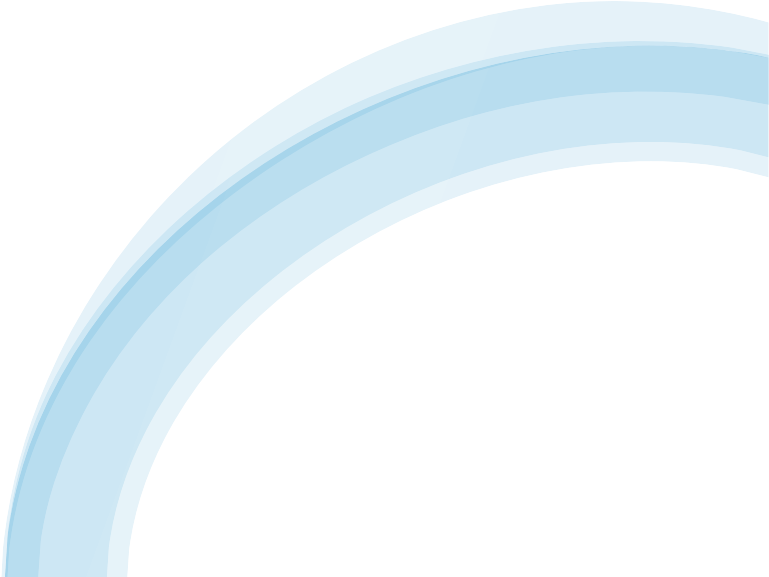
- You need to be in it for the long-term
 - Rarely are there quick wins
- Your pipeline will only grow if you are consistent
 - Daily and weekly activity
- Don't be afraid to talk
 - Connect online, engage offline (phone, F2F)



- Post your thoughts
- Post company updates
- Respond to posts – join conversations
- Make 20 connections a month
- Send 5 emails a day
- Make 20 phone calls a week to

IF YOU DON'T PUT THE EFFORT IN...

Be Active | daily | weekly | monthly

A decorative graphic consisting of several concentric, curved blue lines of varying shades, located in the bottom right corner of the slide.

Track every interaction in CRM



Connections



Emails



Conversations



Meetings

A chess piece, possibly a king, is positioned on a chessboard. The background is blurred, showing a warm, golden light source. The chessboard has a checkered pattern of light and dark squares.

Capture and prioritise vital information

- Opportunity timeframe
- Potential value
- Competitive landscape
- Barriers to entry

Be realistic

- Timeframes
 - 0-3 months is building your network and starting conversations
 - 3-6 months is leads turning into meetings
 - 6-12 months is meetings turning into fees
- Sales forecast
 - Start with DD, Valuations, business advisory services first
 - Deal flow second

A purple padlock with a gold heart-shaped cutout is the central focus. It is attached to a metal shackle. The background is a blurred image of a bridge with stone arches, suggesting a romantic or historical setting.

Nurture

No doesn't always mean no, it often means,
not right now



Manage
Motivate
Measure

We can help you

- DEFINE
 - Identify a prospect pool based on your 'perfect match'
- Nurture
 - Build a digital framework for outreach
- ACTIVATE
 - Create the right 'sales' environment to ensure focus on the programme
- TECHNOLOGY
 - Implement the tech platform to ensure you Manage & Measure





Thank you for listening