

Case Study: Rebuilding the Story

The Document the Champion Could Send to the CFO

How rebuilding a company's core commercial document around the buyer, rather than the platform, gave its champions something they could use inside their own organizations.

The Situation

A B2B software company sells an outbound communications platform to enterprises running high-volume voice and SMS campaigns. It handles compliance, number provisioning, spam remediation, caller ID branding and data purification in one place, replacing the five or more vendors a contact center would otherwise coordinate by hand.

The Problem

The commercial material was organized around the platform. It named the services, showed the architecture and explained what each component did. That works in a meeting where a salesperson is present to explain it. It stops working when the document is passed on to someone else, which in this market is what always happens. The person in the room was rarely the person who approved the spend, and nothing in the pack told them what it was worth in a form they could repeat.

The Approach

HEP rebuilt the story around the buyer and produced a two-page datasheet written to be passed on rather than presented.

- **Established the category before the product.** The document opens on why customer acquisition through digital channels has become more expensive and less reliable, so that outbound matters before the platform is mentioned.
- **Quantified the cost of the current approach.** Five or more vendors, manual coordination between them, and two to four weeks to stand up a campaign. The comparison a buyer was making was against what they already did, not against a competitor.
- **Wrote one claim for each member of the buying group.** Two to three times increase in conversion rates for the revenue owner. Operational costs reduced by 50% to 80% for the operations owner. TCPA exposure of up to \$10,000 per call for the risk owner.
- **Made the investment self-funding.** The document states that in many cases the platform is paid for out of the operational costs and carrier fees it removes, which is the argument a champion needs when the request reaches finance.

The Result

The datasheet was adopted immediately and became the primary commercial document the company put in front of prospects.

The company was subsequently acquired.

Growth Pillars Applied

Value Proposition Narrative	Proof of Value	Revenue Generating Assets
-----------------------------	----------------	---------------------------