RingCentral

RingCentral for Financial Services

CAMPAIGN IN A BOX

Market Opportunity

RingCentral for Financial Services empowers financial institutions to complete their digital transformation journeys while minimizing risk. With more excellent reliability, compliance, built-in redundancy, and unbreakable security in the cloud, firms can gain value from unified communications while attracting and retaining great employees and enhancing customer expectations to please the most fickle customers.

RingCentral's cloud communications and contact center platform delivers unified message, video, phone (RingEX), and contact center capabilities for improved employee and client experiences.

Campaign Prospecting and Content

Components

Email copy	Subject line	Call to action	Asset
#1	"Getting our scattered phone systems streamlined and centralized was like straightening out a giant ball of string."	Read the **SoFi case study** or **schedule a meeting**	Case Study: SoFi
#2	Ensuring compliant communications in Financial Services	Read the **guide** or **schedule a meeting**	Compliant cloud communications: A guide for investment advisors
#3	See a return on investment with RingCentral UC+CC	Read the **eBook** or **schedule a meeting**	The True Value of Unified Communications and Contact Center in Financial Services

Additional Resources

- RingCentral for Financial Services Discovery Questions
- RingCentral for Financial Services Pitch Deck
- Intelligent and Connected Experiences Drive Customer Experiences and Customer and Employee Engagement in Financial Services eBook

Campaign Implementation Guidelines

The most successful prospecting campaigns include a regular cadence of emails plus follow-up calls. Assuming you have an email system like MailChimp, Act-On, or another email marketing automation tool, it should be fairly straightforward to track and report on your email programs from within the email tool and your CRM system. You can easily identify those who click through to your email offers as "hand raisers" who are interested in learning about switching to RingEX or RingCX.

You can then call the most qualified people by starting with those who click through to your content.

Steps for implementing this RingCentral for Financial Services "Campaign in a Box"

1 Identify the right list of decision makers. Typical decision-maker titles include:

Primary:

- IT Manager/Director/VP
- CIO, CTO, COO, or other C-level professionals

Secondary:

- Manager/Director, Unified Communications or Manager/Director, Telecom & Network Services

2 Import the RingCentral email copy into your email system.

Set up a cadence of emails that will go out every other week (excluding/working around holidays).

Tuesday/Wednesday/Thursday, early in the morning (between 5:00 a.m. and 7:00 a.m.) are the best times to optimize open rates.

3 Testing has shown that if an email goes out from a person's name and includes a personal signature with contact information, the response rates are higher than if the email goes out from an anonymous "team" or a company.

Best practices are also to be sure your email system personalizes the email so the prospect's name appears in the salutation, such as Hello [first name], or Dear [first name, last name].

4 Be diligent about calling the "hand raisers" within 48–72 hours of their clicks.

Research shows the majority of activity will occur within the first 48 hours of the email send. Immediate follow-up ensures you reach the prospects before they go cold.

5 Contact your Channel Manager to schedule a demo once you have qualified the lead.

Prospecting Campaign Suggested Schedule:

Schedule	Components
Week 1	Send email #1
Week 1.5 & 2	Follow-up calls: connect with hand raisers
Week 3	Send email #2
Week 3.5 & 4	Follow-up calls: connect with hand raisers
Week 5	Send email #3
Week 5.5 & 6	Follow-up calls: connect with hand raisers
1x/week	Report on opportunities, pipeline, closed/won

QUESTIONS? CONTACT PARTNER SUPPORT
PARTNERS@RINGCENTRAL.COM | 800-595-8110

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