



# Aligning sales and marketing for success.

As the sales funnel continues to evolve for both B2B and B2C, part of keeping up means staying inventive and searching for those areas of improvement—as small as they may seem. For Lauren Weiner, Director of Marketing at Ipreo Private Capital Markets, provider of iLEVEL, a leading monitoring, analytics, and transparency platform, that meant tweaking the process to qualify leads faster.

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## Qualifying Leads Faster with a Conversation

Refining the very beginning of the sales process was where Weiner saw the most potential.

“As a tech company, we’re always trying to be innovative. We want to be at the forefront of our industry and we needed something that would give us an opportunity to qualify leads faster and show potential clients what we have in store for them,” she explained.

This approach led Weiner and her colleague, Melissa Ferraz, Ipreo’s Managing Director of Global Client Development for the Private Capital Markets to using Prezi to create a sales and marketing asset for iLEVEL that would inspire a softer conversation than a direct sales call.

What they ended up with was a dynamic presentation that focused on who they were as a company, the gaps they saw in the industry, plus a sneak peek at their products. In a lot of ways, allowing the sales team to determine which part of the Prezi they displayed during a call was a much better kind of pitch, as it allowed a natural conversation to arise and flow.

“Prezi’s format helps the sales team make faster, better decisions,” Ferraz said. “By focusing more on the needs of the prospect rather than what exactly it is we can do for them, the team can better gauge reactions, qualify leads, and guide the prospect to a buying decision.”

In addition to efficient conversations, Ferraz reported that presenting information as an all-encompassing document rather than a slide deck with an agenda changed the demo process. “We used to have to show the slide-based presentation, then set up another meeting to demo the product. Now, if we see a client is interested, we can pan over to the product right in our presentation and it looks like they’re in the platform,” she continued. “It’s like a demo without an actual demo—which can be too time consuming.”

### **Change Management and Bridging the Department Gap**

To get team members used to this new way of engaging a potential customer, each salesperson had to undergo a Prezi training with the more seasoned members. Focusing on engraining Prezi into their overall process enabled a comprehensive understanding before the selling

process even began—and that effect spread across the organization.

For Weiner, Prezi’s main benefit was the connections it created internally. “Prezi makes people more dynamic and better thinkers,” she explained. “Presenters have to learn how to read their audience. They can’t just rely on the next slide. And people that normally wouldn’t talk about the product or the business in this way—such as sales directors and sales developers—get enough information from reviewing the Prezi to feel good about talking about it. It’s giving our departments a bridge, which has been great for our overall business culture.”

iLEVEL was acquired by Ipreo in August 2015 to become a flagship offering of its Private Capital Markets division. Ipreo is a global leader in providing market intelligence, data, and technology solutions to all participants in the global capital markets, including sell-side banks, publicly traded companies, and buy-side institutions. Ipreo is private-equity held by Blackstone and Goldman Sachs Merchant Banking Division, and has more than 800 employees supporting clients in every major financial center around the world. For more information, please go to [pcm.ipreo.com](http://pcm.ipreo.com).

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