



## Coalesce Corporation

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## Building Prospects & Sales Via Seminars

The Seminar & Database building process is an integrated direct marketing program to multiply the number of sales prospects, accelerate the close of prospects already being pursued and to build a high-quality, client-owned database of all potential purchasers in North America. As such, it creates the basis for current and future database marketing programs.

### *Key components are:*

- *selection of theme and topics*
- *analysis and selection of potential target cities and dates*
- *selection and recruitment of potential speakers and collection of biographies, titles and abstracts*
- *selection and booking of hotels with appropriate room sizes & facilities*
- *refreshments & meal arrangements*
- *data collection, merging and deduping steps for component databases*
- *high speed updating of all database records*
- *development of invitation & telemarketing scripts to collect current and future product use, etc.*
- *build-out and enrichment of the database via outbound interviews with decision makers*
- *creation of databases for staged mailings of the seminar invitations*
- *staged mailing of invitations*
- *in-bound telemarketing registration via assigned 800 telephone and fax numbers*
- *out-bound telemarketing registration to selected target prospects*
- *customized mail/fax/e-mail confirmation followup to registrants with agendas and directions*
- *telephone followup to registrants just prior to the meeting*
- *creation of attendee rosters and name badges*
- *follow up letters to attendees and those interested, but unable to attend*
- *data entry and analysis of attendee satisfaction and sales interest*
- *distribution of attendees and prospects to the appropriate field sales personnel*
- *out-bound telemarketing qualification calls to attendees with immediate product interest*

*There should also be provision for periodic seminar attendee followup telemarketing to harvest prospects who are considering short-term purchase. It qualifies their interest, timing, application and key criteria for purchase. It allows field sales to focus their attention on short-term buyers.*

*All phases of the program are options, any combination of which can be handled by the client or Coalesce. Please use the attached checklist as a guide, and fax the selected items to **Coalesce for a detailed quotation on your program.***

# Detailed Seminar Program Steps, Options & Checklist

| Coalesce                 | Client   |
|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> <b>Selection of Theme &amp; Topics</b> - Brainstorming of topics for urgency, and educational and problem solving value.  |
| <input type="checkbox"/> | <input type="checkbox"/> <b>Seminar Site Analysis</b> - Analysis of laboratory and prospect density around target cities by counting from clients and LABS™ Database.  |
| <input type="checkbox"/> | <input type="checkbox"/> <b>Selection and recruitment of speakers</b> - Coalesce can assist in recruiting top quality outside speakers, which normally results in higher attendance.   |
| <input type="checkbox"/> | <input type="checkbox"/> <b>Selection and booking of hotels</b> - Evaluation based on site quality, meeting space, logistical support and cost   |
| <input type="checkbox"/> | <input type="checkbox"/> <b>Refreshment &amp; Meal Arrangements</b> - Selection of caterer, menu, and order placement  |
| <input type="checkbox"/> | <input type="checkbox"/> <b>Database Construction</b> - Key prospects for the seminar may be generated from field sales representatives' prospects, the client's existing in-house databases & Coalesce's LABS™ Database. Prospects from LABS™ are key individuals in targeted laboratories in the target organizations, updated annually by telephone interview with the lab manager.   |
| <input type="checkbox"/> | <input type="checkbox"/> <b>Bringing records up-to-date</b> - Any of the component databases may be brought up to 30 day recency by telephone, prior to initial deduplication and mailing  |
| <input type="checkbox"/> | <input type="checkbox"/> <b>Initial Deduplication</b> - Duplicate names in LABS™ and client Databases will be purged in the desired order. All databases are assigned source codes for results monitoring.   |
| <input type="checkbox"/> | <input type="checkbox"/> <b>Script Development</b> - Development of Scripts for Database Build out, In-Bound Registration, Out-Bound Registration, Confirmation and Post Symposia follow-up  |
| <input type="checkbox"/> | <input type="checkbox"/> <b>Invitation &amp; Reply Card</b> - Development of Mail Registration Invitation and Reply Card & Addressed Reply Envelope, usually in conjunction with the client's advertising agency. Features desired in the invitation include the ability of the registrant to mail or fax their registration form (and credit card number if there is a fee). Also they should be able to return it even if not attending and state their interest in one or more of the offered technologies. When appropriate, Coalesce will supply artwork with the Coalesce Address for the return envelope. |
| <input type="checkbox"/> | <input type="checkbox"/> <b>Seminar Collateral</b> - Development of Personalized Confirmation Letters, Symposia Binders, Evaluation forms, Post-Symposia "Thank You" letters and Post-Symposia, "Sorry you could not attend" Letters.  |
| <input type="checkbox"/> | <input type="checkbox"/> <b>Database Build out Phase</b> - Trained Technical telemarketers interview and qualify the desired number of prospects, in priority: 1) sales prospects, 2) sales representatives' target accounts, 3) local prospects, 4) more remote prospects around the target cities. They will be qualified as to their stated need for the client's products. The Telemarketers will expand the list by asking the prospect who else in the organization is a candidate, adding to the database all who are valid prospects for the client's products.  |
| <input type="checkbox"/> | <input type="checkbox"/> <b>Deduplication after build out</b> - The database is deduped again, after supplementing it with new prospects found during the course of the build out from referrals likely to be interested in the symposium. Those who have no interest are removed from the invitation list.  |

| Coalesce                 | Client  |
|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> <b>Staged mailing</b> - The mailing database will be sent to the clients' ad agency, which produces the mail piece and return card, and handles the mailing. There will be several mail drops to facilitate "compressed calling".  |
| <input type="checkbox"/> | <input type="checkbox"/> <b>Inbound Registration</b> - One dedicated Inbound Technical telemarketer via a dedicated 800 line, plus a rollover line that can be answered by another available telemarketer, will sign up incoming registrants. 800 telephone and fax numbers will be preassigned, for use in the mail piece and correspondence.  |
| <input type="checkbox"/> | <input type="checkbox"/> <b>Outbound Registration</b> - Technical Telemarketers conduct the specified number of outbound registration interviews, first concentrating on those who requested an invitation in the build out stage, and then using the same priority as in the build out for those not yet contacted. The Telemarketers personally invite them to the Symposium within 7 days of anticipated receipt of the mailing. To make this possible there will be staged mail releases. |
| <input type="checkbox"/> | <input type="checkbox"/> <b>Faxed Invitations</b> - Fax Symposia descriptions and registration forms as requested to interested professionals who have misplaced or not yet received their forms (generally about 15% of the number of interviews).   |
| <input type="checkbox"/> | <input type="checkbox"/> <b>Outbound Registration termination</b> - Terminate outbound telemarketing once it achieves outbound and inbound registrations totaling the number that will ensure the desired attendees for the Seminar   |
| <input type="checkbox"/> | <input type="checkbox"/> <b>Personalized Confirmation Letters</b> - Send by mail, fax or e-mail, personalized confirmation letters and registration packets on a daily basis to registrants.  |
| <input type="checkbox"/> | <input type="checkbox"/> <b>Confirmation Calls</b> - Technical Telemarketers will contact registrants within 48 hours of their Symposium date to remind them of the Symposium.  |
| <input type="checkbox"/> | <input type="checkbox"/> <b>Name Badges &amp; Rosters</b> - FedEx name badges and rosters into each location prior to each event.   |
| <input type="checkbox"/> | <input type="checkbox"/> <b>Event Evaluation forms</b> - Collect the attendance data from the Seminar Evaluation Forms, data enter the information, and do the analysis and report generation.  |
| <input type="checkbox"/> | <input type="checkbox"/> <b>Follow Up Letters</b> - Mail personalized letters to attendees thanking them for attending, and "Sorry you could not make it" letters to those wishing to attend, but unable to.  |
| <input type="checkbox"/> | <input type="checkbox"/> <b>Follow Up Qualification</b> - Immediately after the seminar and then periodically, follow up telemarketing to attendees and those stating they planned future purchase. This delivers high quality leads to the sales force.  |

***The seminar process/database process is one of the fastest ways to generate true prospects, and generates high market coverage. It builds a high quality corporate master database for future marketing activities. This database will be returned to the client or housed at Coalesce and available to client in suitable formats as requested. Coalesce provides full access to listen to Coalesce telemarketers speaking with prospects live and will produce detailed process metrics to monitor the program's progress.***

# Examples of Successful Seminar Campaigns

## Example 1

|                                |   |
|--------------------------------|---|
| <b>Target:</b>                 | <i>Biopharmaceutical companies - Genomic Assay Development Groups.</i>  |
| <b>Description</b>             | <i>One-day free seminar, two outside speakers. Featuring innovative a new instrument technology</i>   |
| <b>Cities</b>                  | <i>4</i>  |
| <b>Mail Count</b>              | <i>7200</i>   |
| <b>Build Out Interviews</b>    | <i>2400</i>   |
| <b>Registration Interviews</b> | <i>2080</i>   |
| <b>Attendees</b>               | <i>675</i>  |
| <b>Results</b>                 | <i>Tripled number of prospects for \$100K capital equipment including 300 new referrals. Forty percent of attendees came from LABS™ Database, balance from in-house databases. Completed 6,000 inbound and outbound interviews, eliminated 2,000 inappropriate records. Increased potential market by \$110 million based on newly generated prospects.</i> |

## Example 2

|                                |  |
|--------------------------------|--|
| <b>Target:</b>                 | <i>Biopharmaceutical companies - Drug Discovery, Development &amp; Clinical Analysis</i>   |
| <b>Description</b>             | <i>Target was upper level researchers and a fee was charged to ensure prospects were serious. Most speakers were outside speakers. Featured seven different instrument technologies.</i>   |
| <b>Cities</b>                  | <i>7</i>   |
| <b>Mail Count</b>              | <i>14,600</i>  |
| <b>Build Out Interviews</b>    | <i>3500</i>  |
| <b>Registration Interviews</b> | <i>5600</i>  |
| <b>Attendees</b>               | <i>396</i>   |
| <b>Results</b>                 | <i>Collected 500 future buying plans in 350 laboratories, a total of \$25 million in sales from attendees and outbound telemarketing. Half of the future buyers did not currently own any of client's products. Collected \$74,000 in registration fees to offset telemarketing costs. Twenty-five percent of attendees and 37% of buyers came from LABS™ Database, the balance from in-house databases. Eleven hundred new referrals were generated in a total of 8,000 inbound and outbound interviews. Thirty-six hundred inappropriate records were removed.</i> |