

How BAO's Appointment Setting Helped InOutsource Overcome Bandwidth Challenges And Accelerate Pipeline Growth

InOutsource is a legal solutions company whose growth potential was constrained by the bandwidth of its business development team.

By partnering with BAO, the company is getting more at-bats with prospects, creating more pipeline opportunities, and expanding brand awareness in the market.

When you're a small company with limited bandwidth in a niche market, it can be difficult to allocate resources for business development. That's the situation InOutsource found itself in. The company has been in business for 20 years and has good name recognition among its target audience of large law firms. But with limited business development resources, it was difficult to find the time to introduce new service offerings to the legal market. Once they get a meeting on the calendar, they have good success rates, but they were limited in their ability to secure those appointments. As a result, "we were leaving business on the table," said Nancy Beauchemin, President of InOutsource.

AN INTRODUCTION TO BAO APPOINTMENT SETTING

InOutsource was introduced to BAO through a partner program. The company had never considered outsourced [Appointment Setting](#) before and it was a revelation. "They took the time to educate themselves on our business and articulating our value proposition very quickly," said Beauchemin. "They were very targeted and succinct with the message and extremely professional. It really felt like an extension of us, and that translated to appointments."

"Once we kicked off the first campaign, I was impressed that the BAO team really understood not just the solution but the pain point that the client might be experiencing, and were able to surface it through deliberate and careful questioning," said Tom Streeper, InOutsource's Director of Business Development. "That's how they got the appointments, and it was extremely effective."

The company was so impressed that when the program ended, they started working with BAO directly. "Even though we're growing, we don't have the bandwidth to build an inside sales program," said Beauchemin. "BAO already knows how to do that well, so it makes sense to continue to leverage their expertise."

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NANCY BEAUCHEMIN, PRESIDENT OF INOUTSOURCE

BAO + InOutsource

A TRUE PARTNERSHIP FOR GROWTH

Together, InOutsource and BAO have executed numerous Appointment Setting campaigns, targeting a variety of decision-makers to promote different offerings. BAO operates collaboratively as an extension of the InOutsource team, meeting weekly to refine their strategy, whether that's adding new targets, adjusting any messaging that may not be resonating, or trying something new. "I always say that success requires a true partnership where both sides are invested in the success, and BAO is very much invested in our success," stated Streeper.

With BAO as part of the team, InOutsource is able to stay in front of existing clients and uncover expansion opportunities to cross-sell various solutions. Calling these clients was an action item perpetually on Streeper's to-do list that always seemed to fall off in the wake of other priorities. Now he gives BAO the list of firms and they secure the meetings. "It's a huge burden off my plate to have an appointment with the firm I was going to reach out to but then never had the time to call."

The relationships go deeper than just a professional partnership. Because InOutsource has a consistent team of ISRs assigned to their campaigns, they have the opportunity to forge bonds and build strong relationships that further contribute to the success of the partnership. "I see in the people that BAO hires a strong sense of pride in their work and in the company, they represent, and that comes through," said Beauchemin. Streeper added, "At InOutsource we're very much a family environment and that's extended to BAO. We've really gotten to know each other. It's more than just having a discussion about the campaign and how successful it is—we're actually invested in and care about each other."

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NANCY BEAUCHEMIN, PRESIDENT OF INOUTSOURCE



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KEYS TO APPOINTMENT SETTING SUCCESS

InOutsource offers a variety of solutions and there's no one single decision-maker that covers them all—they're looking to target chief administrative officers or CIOs for new case filing intelligence, finance teams for analytics tools, and the information governance group for FileTrail, for example. Rather than going in broad and talking about the company as a whole, the team executes specific campaigns focusing on a particular solution or opportunity with a succinct, targeted message.

"This targeted strategy is highly successful," said Beauchemin. "Even if we reach someone who knows about InOutsource for one particular area—maybe we implemented new business intake software for them—but if we call them specifically about our cost containment practice or storage contracts or another area, we can get them to think about us for these other things."

Another key to success is maintaining constant open lines of communication to discuss what is and isn't working.

"Active collaboration is crucial, and without that there'd be a lot of wasted time and frustration all around," stated Streeper.

"Just recently, our ISR shared with us that the message for a particular campaign wasn't resonating, so we got together and refined it. We gave her some additional talking points and the impact was immediate—she was able to quickly get six new appointments."

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TOM STREEPER, DIRECTOR OF BUSINESS DEVELOPMENT, INOUTSOURCE



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RESULTS

The goal of the program is simple: deliver appointments to get the InOutsource team in front of potential opportunities. And it's working—the program has created more pipeline opportunities resulting in closed business for InOutsource. As an added benefit, BAO has also secured meetings in firms that InOutsource had been trying to get into without success.

It's not about selling the solution to the prospect in that moment, it's about selling a half-hour of time. "Just getting that time scheduled for us is huge," said Streeper. "The biggest success for us is just more exposure to more people, and having BAO help us get that exposure is a win."

LOOKING AHEAD

InOutsource is on a growth path. The company has added a lot of new people and is continuing to capture opportunities in the market. "If a law firm learns about another area where we can service them, especially if they've done business with us before, it's a win for us and a win for them," said Beauchemin. "As part of our team, BAO helps us drive that success with messaging and access."

"We help law firms with the big picture of information governance and almost all of our solutions connect in some way," added Streeper. "There's a lot of white space where clients don't know we can help them—looking at our biggest white space opportunity will always be the next campaign, and with BAO we can continue to fill in those gaps."

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HOW CAN APPOINTMENT SETTING FROM BAO HELP FUEL YOUR GROWTH?

If your team simply doesn't have time for prospecting...

If you're leaving business on the table because you don't
have the resources to capture all the potential that's out there...

If you're not getting enough meetings to support your
pipeline goals...

Contact us today at info@baoinc.com or 978-763-7500
to learn what Appointment Setting can do for you.