

## Summary

Students developed new tools for streamlining sales processes and identifying new business opportunities for a marketing technology provider.

## Project Snapshot

Focus: Sales and Marketing Research

Client: Branch Metrics

Industry: Marketing Technology

Type: For-profit

HQ: Palo Alto, CA, USA

## Challenge

Branch Metrics is an enterprise software-as-a-service (SaaS) company serving businesses with B2C mobile apps in the marketing technology space. Branch provides deep linking solutions that help companies influence and monitor how customers navigate their ecosystem, including channels such as mobile apps, web browsers, and physical advertisements via QR codes.

For this engagement, Branch partnered with the FCCP team to jointly assess their existing research and sales collateral, with the goal of reevaluating how they approach the early stages of their sales process.

## Approach

The FCCP team started by assessing the challenges that organizations in various target verticals were struggling with, and then connecting challenges in digital channels back to Branch Metrics' products and services. To accomplish this, they divided their project into phases.

First, the team dove into Branch's value proposition, developed an understanding of the competitive landscape, and learned how Branch approaches the sales process. They conducted stakeholder interviews, and studied what differentiated Branch from its competitors.

Next, students researched industries and verticals that Branch prioritized to understand each vertical's unique characteristics and pain points.

**“Our project team took on a very relevant workstream, with high visibility in our organization. They self-organized, researched, and adjusted on-the-fly as requirements shifted. In the end, they completed multiple deliverables that were immediately actionable for our teams.”**

Reed Kuhn, Senior Director of Business Strategy, Branch Metrics, Fuqua MBA '06

## Recommendation



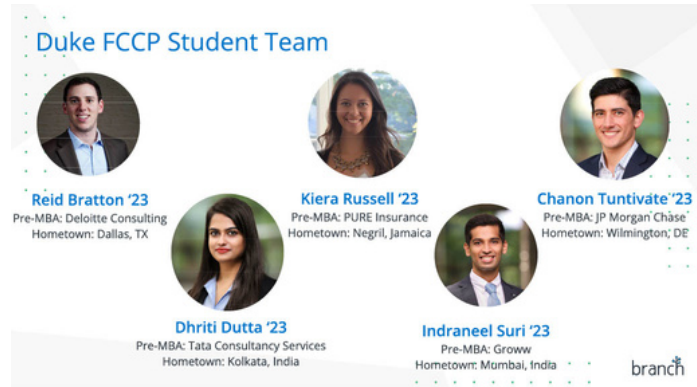
Students recommended an initial sales strategy with an individualized, client-centric approach. By tailoring sales pitches to the unique challenges facing each vertical, as identified by the team, a higher number of prospects could be converted to clients.

In addition to the extensive research conducted on each vertical, the team provided new marketing report templates and rubrics by verticals so that the Branch team could easily track findings and benchmark them against their competitors in the marketing technology industry.

"Our project team took on a very relevant workstream, with high visibility in our organization," said Reed Kuhn, Senior Director of Business Strategy and Fuqua MBA '06. "They self-organized, researched, and adjusted on-the-fly as requirements shifted. In the end, they completed multiple deliverables that were immediately actionable for our teams. Feedback was entirely positive."

**"The final presentation was attended by senior leaders, including one of the co-founders of the company. Feedback was entirely positive, and there was interest in recruiting from the Duke MBA program in the future."**

Reed Kuhn, Senior Director of Business Strategy, Branch Metrics, Fuqua MBA '06



*The Daytime MBA team was comprised of five students from three different countries, representing a variety of pre-MBA backgrounds such as consulting, banking and financial services.*

## About FCCP

The Fuqua Client Consulting Practicum is a for-credit experiential learning course at Duke University's Fuqua School of Business. In FCCP, students apply their business skills and relevant work experience to an active project engagement with an external client. Interested in engaging our students? Learn more at [www.fccp.fuqua.duke.edu](http://www.fccp.fuqua.duke.edu).