

## COMPANY PROFILE



Planitax, Inc. founded in 2000, provides software and tax technical services to help corporate tax departments transform their focus from tax compliance to tax strategy.

The company's solutions target a range of tax processes that represent the bulk of the cost, resource drain, and risk that accompany the entire compliance process. Current clients include Guidant Corporation, SBC Communications, and Hyperion Solutions. The company is venture-funded and located in Emeryville, California.

## Marketing Challenge

The four-year-old company had recently raised a new round of financing and management needed quickly ramp up revenue. Achieving that goal meant hiring more sales people and getting them productive—fast. To accelerate their sales and marketing efforts, Planitax first needed to analyze its in-house customer and prospect list and narrow down the target market. “We really needed to identify the market bull’s eye”, said Greg Morse, Planitax VP of Marketing, “we needed to focus our efforts on the best opportunities so that our marketing and sales efforts would be most effective.” After identifying its addressable market—under 3,000 companies—Planitax needed to provide

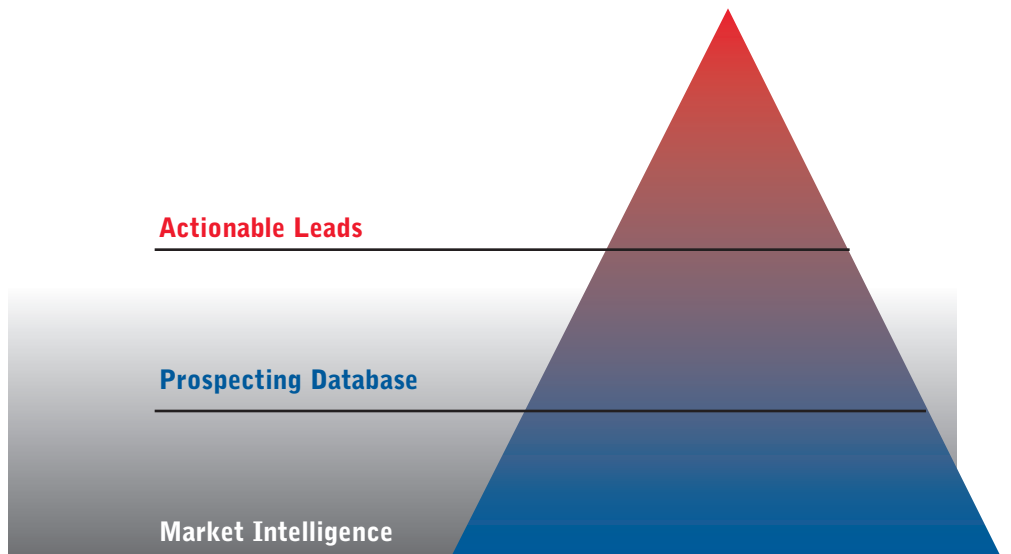
its sales people with high-value leads to help them build their sales pipeline. One of the drawbacks of traditional demand generation methods is low information value; frequently the “lead” only reveals that the individual prospect is interested in the solution offered, and little more about the context of that request. In a solution-selling approach this has low utility and forces the sales team to spend valuable time further researching and qualifying suspects. Since time-to-revenue was critical, Planitax knew traditional demand generation methods wouldn’t suffice. They turned to SimplyDIRECT.

“SimplyDIRECT offers the most intelligent marketing service I have ever found or used.”

Actionable Leads

Prospecting Database

Market Intelligence





## The Simply Direct Solution

Planitax and SimplyDIRECT went to work laying out a strategy to jump-start the company's sales and marketing efforts. SimplyDIRECT recommended a two phase approach—first, process the company's in-house database to identify target market characteristics and second, launch a survey campaign to profile individual sales opportunities within those markets. Planitax forwarded their entire in-house list (stored in Salesforce.com) to SimplyDIRECT where they went to work processing it to identify the market targets. The data analysis immediately yielded rich information on the market segments where the company was having the most success. Once having precisely identified their target markets, Planitax then needed to find live sales opportunities within those segments.

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SimplyDIRECT created a survey to profile each account, identify the decision-makers, their pain-points and buying plans. After two weeks of consultation with Planitax, they launched the survey campaign and results started coming in right away. Soon, Planitax's sales people were receiving high quality, detailed profile information on each opportunity such as company size, industry, "pain points", decision maker's names and buy times. This enabled the sellers to focus on the most likely opportunities and because of the rich information provided, they were able to engage high-level decision-makers right away.

## Results Delivered

The depth of information provided by SimplyDIRECT enabled Planitax's sales people to engage high-level decision-makers and get appointments. "This really got sales stoked up," said Morse "as new sales people came aboard, we handed them warm leads, which they quickly called and got meetings. It was a real success," said Morse. "In about 6 weeks, we had over 100 high quality opportunities in the pipeline—two of them later turned into six figure sales"

An additional benefit of the survey project was how it helped Planitax fine-tune their marketing messages. The same rich data provided to the sales force, gave the company valuable insight and helped Planitax build more effective marketing programs.

What they learned helped Planitax revamp their communications vehicles, from marketing collateral to the company website. "From a marketing perspective, this is very powerful intelligence," said Morse "What better way to validate and hone messaging? The smarter we got, particularly about market drivers, the more success we had. SimplyDIRECT offers the most intelligent marketing service I have ever found or used."

## Corporate Profile

Founded in 1996, Boston-based SimplyDIRECT is a marketing services firm that helps clients identify, engage and qualify prospects with maximum precision.

## The company offers three core services:

1. Custom contact database development
2. Opt-in, executive-level lead generation
3. Cleansing and updating of client databases

## Clients Include

Akamai  
American Express  
BearingPoint  
Computer Associates  
Dun & Bradstreet  
E2Open  
Genesys  
IBM  
MarkMonitor  
Perot Systems  
Veracode  
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