



**sf** | Stage 1 Financial

# Sales Development Case Study

PREPARED BY CIENCE TECHNOLOGIES, INC





## About Stage1Financial

Stage 1 Financial provides outsourced accounting and finance solutions that align with their clients' organizational and strategic priorities. They work with fast-growing, investor-backed companies.

Stage 1 Financial has developed an automated financial reporting system tailored for each customer with easy-to-navigate dashboards and data analysis generated on-demand to suit customer needs. By providing real-time reporting, the company places data at the fingertips of business leaders, allowing them to focus on building their companies and impressing potential investors.



**Katy Triefenbach**

CEO

### Industry

Financial Services

### Website

[www.stageonefinancial.com](http://www.stageonefinancial.com)

## Challenges and Scope

**ICP:** Industry-specific

**Product:** The accounting, finance, and reporting solution for investor backed brands.

Katy Triefenbach, CEO: *"We needed a sales support representative who understood data research."*

Many CIENCE clients want an SDR that also excels in sales intelligence. We offer to work with our Sales Assistants (SA). These are people who generate leads and then perform targeted outreach via email, phone, and/or social networking websites.

*"I did a test research project with them for lead generation. I was pleased with the results, their timing, and their communication. Their sales team spoke with me about an ongoing monthly relationship and I considered the options they offered. Based on the value and the price point, I opted for the full-time sales assistant."*

Human-driven, software-augmented sales research is what CIENCE takes extreme pride in delivering. Every contact list is generated in accordance with the client's Ideal Customer Profile several days before the actual outreach to make sure the data is up-to-date. The quality of the leads is held to extreme standards.

## Why CIENCE

*"I've had a very good experience with CIENCE. They joined us very early in our company's lifecycle and I've never felt the need to look for someone else. They're super responsive and they do a fabulous job. About 95% of our communication is via email and about 5% by phone."*

Flexibility is the guiding principle of our work at CIENCE. We believe that every client is unique and adapt each campaign to meet their specific needs.

*"CIENCE has been a long-term partner. They are cost-effective and deliver on assignments. They offered us a very customized approach to fit our needs. They tailored the workload to meet our specific sales cycles and desired customer interface."*

Cost-efficiency is one of the major reasons why companies choose to outsource their sales research and development. The difference between monthly expenses for an in-house SDR vs. our dedicated team is quite significant.

**Extension of your Team:** The CIENCE model is People-as-a-Service, and our employees are our major resource. We help our clients find targeted leads and start valuable business conversations with them in personalized and authentic outreach. In a world of increasing automatization, we see that the human touch is still crucial for implementing these tasks.

*"We have one full-time sales assistant who works remotely. We tempered her role to fit our unique situation and she was solely responsible for our account. CIENCE provided a communicative, well-organized team member to manage the account. I interface with my sales assistant on a daily basis. I also speak with the sales representative from their executive team once or twice a year."*

## RESULTS

At the time of publishing this case study, we have been working with Stage 1 Financial for a year. As a result, our Sales Assistant has built a strong working relationship with CEO Kate Triefenbach.

*“The SA executes the deliverables I give to her. She has a very structured role and has been able to produce what I need. She’s a cost-effective, value-driven team member and we’ve had several successes with her. The CIENCE Sales Assistant is responsive, communicative, and well-organized. It’s nice having an external employee who I don’t have to manage. We have a very good working relationship.”*

*“Write out your statement of work clearly and agree upon it upfront so they can find the right team member. Very clear communication will help ensure success early on.”*

We successfully launched over 10 campaigns targeting different industries and set over 190 appointments for Stage 1 Financial, helping them grow their sales and business.

### CIENCE’s Evaluation

Overall Score		★ ★ ★ ★ ★
Scheduling		★ ★ ★ ★ ★
Cost		★ ★ ★ ★ ★
Quality		★ ★ ★ ★ ★
NPS		★ ★ ★ ★ ★



548 Market St #99737  
San Francisco CA  
94104-5401 US

+1 (949) 424-2906  
[hello@cience.com](mailto:hello@cience.com)  
[www.cience.com](http://www.cience.com)