



MCT[®]
Your Trusted Capital Markets Partner

Sales Development Case Study

PREPARED BY CIENCE TECHNOLOGIES, INC





How CIENCE Reached Ideal Prospects in a Niche B2B Software Market

About Mortgage Capital Trading

Mortgage Capital Trading is a technology-centric capital markets advisory firm that uses industry experience to train clients on all aspects of capital markets. Mortgage bankers of every size trust MCT to manage risk, drive operational efficiency, and increase profitability.

Since 2001, MCT has evolved from a pipeline hedging services specialist into the industry leader for fully integrated capital markets software and services. The software solutions continue to support new advancements in mortgage technology that lead to more profits and business efficiency.

MCT has developed award-winning technology for residential mortgage investors. It helps them to scale their seller base, automate the bid process, source whole loan and flow co-issue production, automate the trade assignment, and analyze performance, all cost-effectively.

In 2018 and 2019, independent research firm STRATMOR rated MCT with the highest Lender Loyalty Score in the category of Production Pipeline Hedging. Further, MCT received the highest overall satisfaction of any vendor measured in the study that analyzed the entire mortgage industry.



Ian Thomas Miller

CMO

Industry

Marketing & Advertising

Website

www.mct-trading.com

The Story of Mortgage Capital Trading

MCT's services have a verifiable track record of improving profitability, and several MCT software platforms provide unique profit opportunities. The company's software platforms offer verifiable increases in efficiency by reducing or eliminating manual processes and increasing digitization.

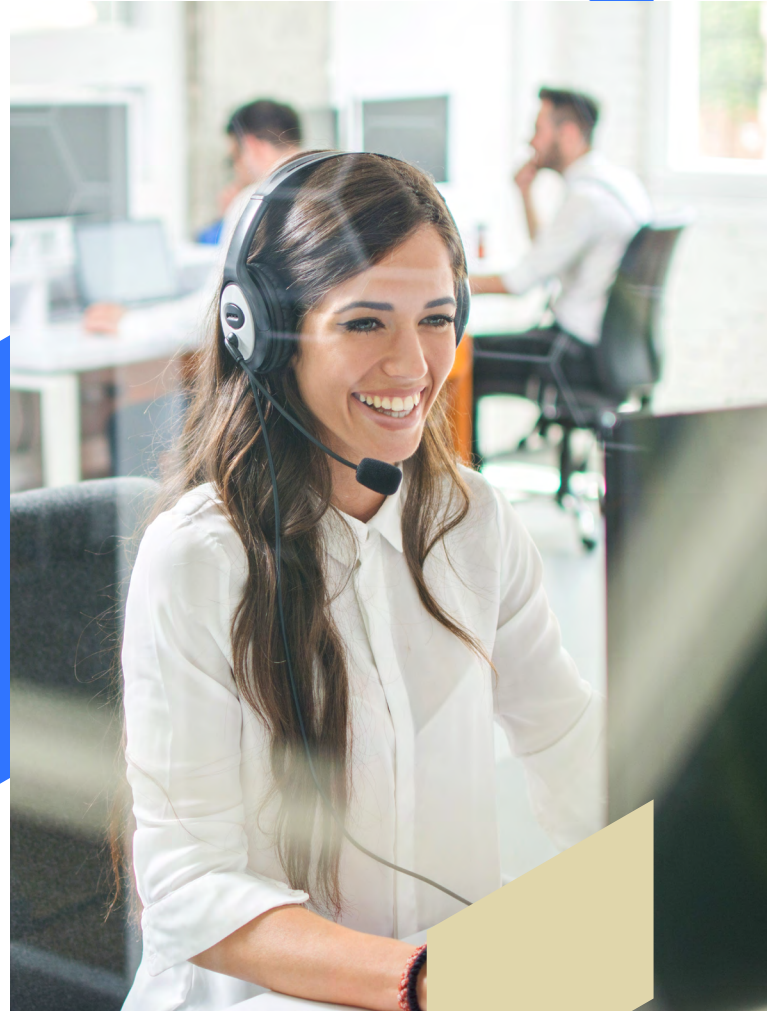
During the pandemic, MCT proved to be the most transparent, communicative, and reliable guide for lenders during periods of market volatility. At the onset of COVID-19 and while the mortgage industry was in turmoil, MCT subscribed to doing whatever it took to ensure mortgage lenders (not just MCT clients) remained in business and positioned to capitalize when the market calmed down.

"MCT has real value propositions for the client," said Dave Phillips, campaign strategist at CIENCE. "They have actual metrics and quantitative features that they're able to deliver." With such a unique selling point, MCT's team realized that outbound would enhance their company's growth and started looking for a partner to outsource this process.

"We have innovative technology with no shortage of angles, new software, and services to approach the market, which is a part of why we've been so successful," said Ian Thomas Miller, chief marketing officer at MCT. "I am excited to find a partner that can get in step with us." After meeting with several vendors, MCT chose CIENCE.

Challenges & Scope

With a unique product advertised to a niche market, MCT's outbound strategy would have to evolve significantly to reach its ideal prospects.



Challenges

MCT's industry had the benefit and the challenge of having a finite set of potential customers. "There's no one else that does what they do exactly," said Kael Lindstedt-Bendt, sales development manager at CIENCE. "The challenge is their total addressable market is very small."

Another challenge was the MCT's limited onsite sales resources. "For many MCT's prospects, it is all about timing," said Lindstedt-Bendt. "MCT required consistent and constant personalized touch and multiple retouches needed to be netting opportunities."



Need

MCT needed an outsourced service to help accelerate its growth out of the gate by securing appointments with ideal prospects. The ideal customer profile (ICP) consisted of mortgage lenders, including depository banks, credit unions, independent mortgage bankers, and correspondent investors.

Opportunity

MCT saw a perfect partnership with CIENCE for increasing its clientele and meeting its growth goals. CIENCE could generate more appointments as well as research the target audience to identify new prospects and the associated contacts. “We wanted CIENCE to be the tip of the spear on getting that into the market,” said Ian Thomas Miller.

Why CIENCE?

MCT was impressed by CIENCE’s comprehensive, data-driven approach to outbound. “We met with four or five different vendors in this space before selecting CIENCE due to their sophisticated process and technology and integrated marketing/sales outreach approach,” said Ian Thomas Miller. The CIENCE Client Activity Portal (CAP) was also the main attraction: “They have an excellent client

data portal that allows us to track their outreach efforts across all the channels nearly live,” said Miller. “This has been super helpful and was a key selling point.”

At the start of the partnership, CIENCE offered MCT a questionnaire for developing a highly targeted ICP that transformed into a lead contact list. MCT shared a starter prospect list from the company’s database with some input material on the target audience and differentiators, along with a do-not-contact list.

After enriching this data, CIENCE was able to build a highly personalized messaging playbook covering phone, email, and social media outreach. As a result of these activities, the success of the campaign was immediate. “Within the first two weeks, we were generating meetings with interested prospects,” said Miller.

Results

The partnership started in April 2022. Since then, The partnership started in August 2021 and is ongoing. Over the course of 2022, CIENCE generated over eighty appointments. Emails resulted in nearly half of the meetings, while calls made up for one-third. LinkedIn and web brought around 10% each. CIENCE’s re-engagement activities generated an





extraordinary total addressable market (TAM) outreach. “We have broken through to fifteen percent of their TAM, and we have gotten meetings with ten percent of their TAM,” said Dave Phillips.

“They did have an addressable market and a lot of great differentiators,” said Jay Evans, sales executive at CIENCE, about the campaign’s success. “And they sync up with prospects just beautifully.”

CIENCE consistently delivered outstanding results by securing appointments with MCT’s ideal prospects. “We signed our first two deals that came from CIENCE’s prospecting efforts,” said Ian Thomas Miller. “We are looking forward to more in the coming months as our sales process can be fairly long.”

Success in Partnership

For both teams, the most exciting campaign results were those of closed meetings with MCT’s dream prospects. “In a few instances, we scheduled meetings with somebody they’ve wanted to talk to for a while now,” said Kael Lindstedt-Bendt. “There were quite a few achievements where we could cross somebody off their unicorn list.”

MCT was impressed by various aspects of CIENCE’s work processes. “CIENCE’s ability to integrate staff from the U.S. and abroad seamlessly provides competency, creativity, and value,” said Ian Thomas Miller.

The team’s attention to detail and swiftness in making adjustments to the client’s needs contributed to campaign

success. “Our willingness to engage with them was an insurmountable metric for MCT,” said Jay Evans. Openness in their communication became an integral part of building a trusting relationship.

“A large aspect of success is that MCT’s team has always felt comfortable having conversations with us,” said Lindstedt-Bendt. “And that has been an achievement or one of the growing reasons for MCT to stay with us outside of results.

Many factors made MCT a good fit for CIENCE. “They truly and honestly have a good understanding of the values that a service like CIENCE can provide outside of just set engagements,” said Dave Phillips. “So, there wasn’t a service that CIENCE provided that they didn’t also see value in.”

This partnership is an excellent example of a synergy between teams that goes beyond successful campaigns and impressive metrics. “Working with them has been such a joy that it was like relearning how smooth and nice and joyful a campaign can be with a group,” said Lindstedt-Bendt. “Their team is passionate because they live, eat and breathe their industry.”

“They’re a great partner and amazing to work with,” said Phillips. “We partnered with them and enjoyed watching them grow as we worked together.”





Key Takeaways

- With a niche product advertised to a small total addressable market, focusing on re-engagement is a profitable strategy.
- Choosing a partner based on professional values leads to successful collaboration and enjoyable communication.
- If your business has limited time or resources, outsourcing lead generation is an excellent solution for enhancing your growth.



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