



# CASE STUDY

## Leading Foreign Exchange broker uses Zint's collaborative spreadsheets to streamline prospecting efforts...



**Industry:** Foreign Exchange

**Size:** 25+ FTEs

**Company:** Based in the heart of London's financial district and with over 10 years of experience catering to a variety of clients, we have a dedicated online payments platform, a dedicated account management team and a dedication to minimising your currency risk.

### **Challenge**

We have a team working to identify and make contact with target companies. They need to be equipped with insight on a prospect company's imports and how the currency has been dealt with. The team works with large volumes of target companies which can often be qualified in or out within the first outreach. Without shared visibility into which organisations had been contacted, we found that agents were losing precious time pursuing prospects that had already been disqualified or were in an active sales cycle.

### **Solution**

We needed a solution which provided the team with visibility into which organisations had already been contacted and the remaining "white space" opportunities. The collaborative spreadsheet in Zint has provided us with a means of visualising the entire UK market in real-time, allowing us to take a systematic approach to prospecting.

### **Outcome**

This has given our agents the autonomy to select and build lists of ideal prospects without duplicated effort or removing these prospects from other agents' pipelines. The ability to create collaborative tags and share notes, has ensured that discovery work is never done twice.

**Peter - Sales Manager**