

## Driving Growth through Differentiation

Convergence Research was founded in 2007 by Drew Wildner and Steve Hartz. The Cincinnati-based company provides Credit Reporting Agencies (CRA's) with accurate, timely research used for background check reports. To achieve their mission, Convergence Research developed and continue to enhance a comprehensive, scalable, high quality process with best-in-class technology. They are a growing firm with what they believe is untapped potential. To support their efforts, in 2019, they set up a new sales team led by Kyle Warmouth, VP of Sales.



### Challenge

While Convergence Research's offering is superior, it's hard to differentiate in the industry. Warmouth quickly identified the need to develop a differentiated brand message and develop a consistent cadence of communication to support their sales efforts. Because Convergence didn't have an internal marketing team, Warmouth knew he needed to find an external resource to help.

### Solution

Warmouth reached out to Amy Connor, President and Owner of CMO-OnLoan to discuss the marketing needs based on his knowledge of the firm's expertise. "CMO-OnLoan was able to propose a partnership that met our needs in terms of cost and deliverables. Instead of using a one-size fits all approach, they worked within our budget to provide the help that meets our needs," said Warmouth.

### Approach

CMO-OnLoan broke up Convergence's marketing needs into pieces and tackled them one at a time. In order to fully understand the Convergence business, CMO-OnLoan conducted an analysis of current plans, results and processes, completed a competitive audit, and performed stakeholder interviews with company leadership, staff members and customers.

CMO-OnLoan then determined short-term marketing needs including the development of key marketing messages, sharpening of Convergence's unique brand positioning, and refreshing marketing materials including Convergence's website.

- In order to compete in the records research industry where differentiation is a challenge, Convergence needed to find a way to stand apart from competitors.
- Convergence reached out to CMO-OnLoan to help them define their brand, create an integrated sales and marketing playbook, and provide guidance during implementation.
- With the CMO-OnLoan, Convergence now has leading measures indicating they are on the path to their growth plan. Their clearly defined, strong and consistent brand will enable them now and the future to differentiate in the market.

CMO-OnLoan conducted a working session with the leadership team, shared findings of their research and together, determined Convergence's unique value proposition.

CMO-OnLoan also led the process of refreshing Convergence's website, from choosing an agency, editing copy and then guiding the implementation. The new site not only represents, showcases and supports the Convergence brand, but it serves as a sales tool.

Together with Warmouth, CMO-OnLoan created an integrated sales and marketing playbook. This is now the roadmap that Convergence uses to deliver their growth targets.

Now, CMO-OnLoan stays alongside Warmouth and the sales team to provide on-going marketing guidance. Convergence Co-Founder, Drew Wildner, says "CMO-OnLoan is a true partner, always willing to offer expertise and advice. They are responsive and talented collaborators. They approach the business holistically, starting from the top and bringing everything together to get results."

## Results

"We were impressed with how much CMO-OnLoan delivered in a short period of time. They quickly gained an understanding of the business and rolled up their sleeves to get the work done with us. After working with CMO-OnLoan, our leading measures indicate that we are on the path to the growth plan and we have a clearly defined, strong and consistent brand," concluded Warmouth.

CMO-OnLoan Delivered:

1. Integrated sales & marketing playbook
2. Clearly defined brand / Unique value proposition
3. Website refresh plan and implementation leadership
4. Ongoing marketing guidance



Previous Branding



Updated Branding

## About CMO-OnLoan

With CMO-OnLoan you gain marketing experts who:

- Are trusted and valued members of your team
- Provide expertise to help grow your business
- Have an entrepreneurial and problem-solving spirit
- Provide leadership from planning through execution
- Can connect you to a network of trusted, expert resources

## We're Here to Help!

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