DEMAND GENERATION

Five to ten lender conversations a month, outside the referral network.

This firm could only place a loan with lenders it already knew would fund it, and every one of those lender relationships had arrived by introduction. We built a channel that adds them on schedule instead of by chance.

Client A commercial finance and debt advisory firm

5 to 10	6	13
Qualified conversations a month that lead to deals	Lender profiles the outreach is segmented across	Debt products it has to speak to

THE SITUATION

The firm was not short of lenders. It was short of lenders it knew how to route to.

The client is a debt advisory firm in the credit lending space, working the borrower's side of the table. It does not lend or set terms. It takes a transaction, sizes it against what the asset will support, frames the request, and puts it in front of the lenders most likely to compete for it.

That last step is the business, and it runs on knowing what each lender will actually fund: asset types, geographies, deal sizes, structures, and the constraints nobody publishes. The industry calls it the box. Knowing the box is what sends a deal to four lenders who might compete for it instead of forty who will not read it.

Every box the firm held had arrived by introduction. A lender met on a prior deal, a broker passing on what fell outside their remit, a referral from counsel. Good relationships, all of them, and not one that could be made to arrive in the week the firm needed it.

WHAT WE DID

- Segmented capital providers into the six lender profiles the firm routes across
- Built named lists by profile, product and state rather than buying a list
- Asked lenders the one question they always answer, which is what they fund
- Warmed sending infrastructure before volume, then ran outbound end to end
- Handed back booked conversations with the lender's criteria already captured

WHAT MADE IT WORK

A referral network cannot be scheduled.

The introductions were good. Not one of them arrived in the week the firm needed it. A channel the firm controls is the only way a relationship business adds relationships on purpose.

Audit first
The diagnosis comes before any proposal.

Fixed scope
Written and bounded. No open ended retainer.

Senior operators
The people who scope it are the people who do it.

One name owns it
A single lead is accountable for the number.