

Researching where buying needs emerge

Company and buyer research for specialist B2B firms.

Company overview
September 2026

Where our work fits

We investigate changes inside potential customers that could create a need for your expertise, then test whether there is an opportunity worth pursuing.

The commercial starting point

We assess your growth objective and what your current approach produces. Together, we establish whether better insight into buying needs would address a specific gap.

The work we take on

We research relevant company changes and speak with the people involved to test the need. Email and LinkedIn are channels within the agreed work. Your team leads sales and delivery.

Each account decision has a reason, source evidence and a record of what remains unconfirmed.

How we assess an opportunity

01 Assess the gap

Establish the objective, current approach and evidence of a constraint. Assess whether this work could help before recommending an engagement.

02 Investigate company changes

Connect a sourced business change to a possible need for your expertise. Record why the account fits and what would rule it out.

03 Test the buying situation

Ask the people involved whether the need exists. Record their answers, decision process and timing against the agreed criteria.

04 Decide the next step

Pass on suitable opportunities with their context. Revisit or exclude others based on the evidence. Use sales feedback to improve account decisions.

Qualification reflects your offer and the buyer's actual situation.

Before outreach begins, we agree what must be established for an introduction to count as qualified.

Qualification area	What we establish
Account fit	The organisation fits the agreed market and can use your service.
Commercial need	A relevant problem or initiative gives the buyer a reason to engage.
Decision process	The contact's role and the people involved in evaluating the work.
Budget and timing	The funding position and intended timeframe, as the buyer describes them.
Next conversation	The prospect agrees to a relevant discussion with your team.

We distinguish confirmed information from open questions in the handover.

A new consulting offer generated 48 qualified calls in 30 days.

\$2.3M

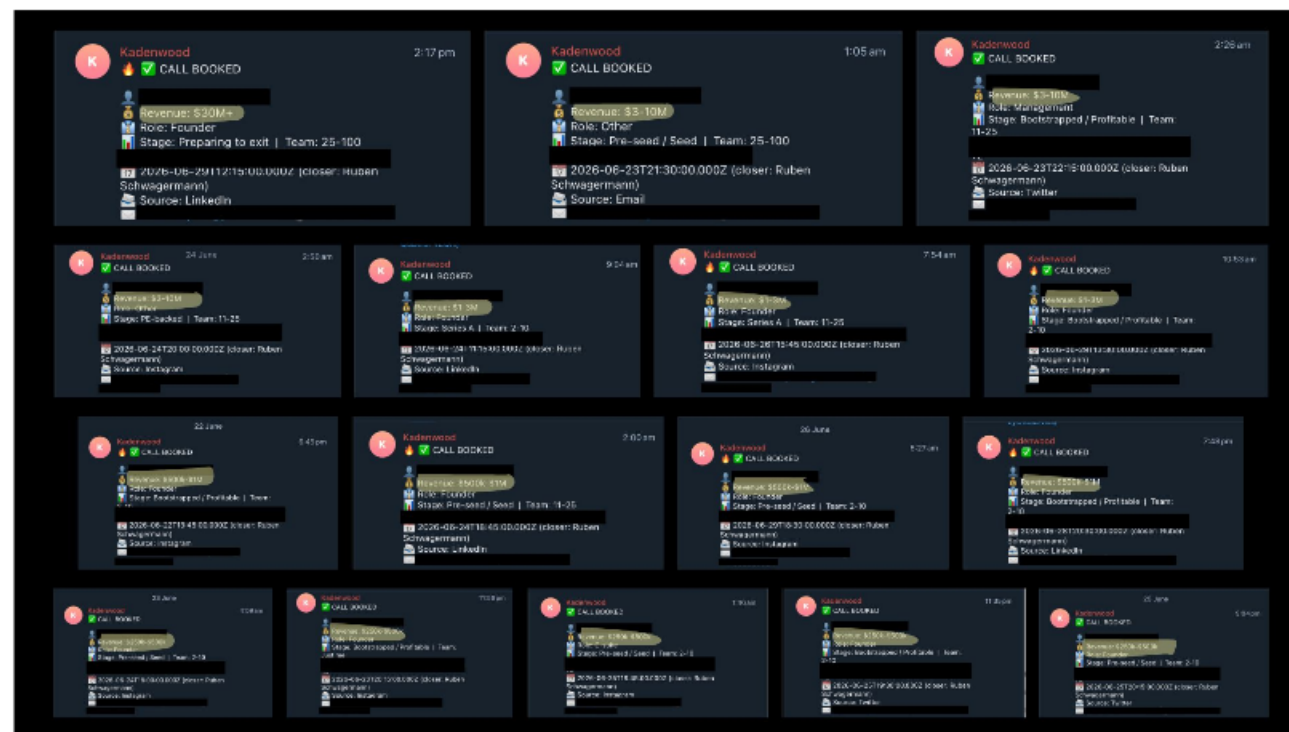
reported mandate pipeline

The starting point

An investment banking and capital advisory firm wanted established operators for its new consulting arm.

The approach

Refine the commercial proposition, validate it with previous programme opt-ins and use supporting material before the sales call.



Selected booking records from the case-study material.

Source: Campbell H&W, Multi-Channel Distribution Case Study. Pipeline is distinct from collected revenue. This engagement began with a reactivation audience.

The people shaping your engagement are involved in the commercial discussions.



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Managing Partner

Client strategy and account
research



Vas D

Partner

Discovery and business
development



Ayush U.

Chief Commercial Officer

Commercial strategy and
proposal review

A defined scope makes ownership and delivery clear before work begins.

Campbell's responsibility

Research the agreed market, test the account rationale and document what buyers confirm. Carry out the agreed contact and qualification work.

Your team's responsibility

Accurate offer information, approved proof and timely feedback. Your team leads the sales process and fulfils the service sold.

The proposal and scope of work

The documents set out the target market, qualification standard, activities, delivery expectations and responsibilities. Commercial terms depend on the scope and delivery requirements.

The first call establishes whether there is a commercial case to work together.

What we will discuss

Your priority service, the clients you want to win and how new business reaches you today. We also cover deal economics, sales cycle and capacity for new work.

What to have in mind

Your growth objective, what you have tried and whether the current approach can support it. Bring the questions you would need answered before considering outside support.

If there is a fit

We agree what to investigate and what a second conversation needs to resolve. You review the account evidence and proposed approach before deciding whether to proceed to a defined scope and commercial terms.