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Sales and Lead Generation Strategies in the Courier and Logistics Industry: A Practice-Based Case Study of Appan Courier

A Reflective Analysis of Prospect Engagement, Follow-up and Franchise Partner Development

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Abstract

This paper examines sales and lead-generation practices in the Indian courier and logistics sector through a practice-based case study of Appan Courier, a Pune-based courier and logistics service provider. It draws on the author's on-the-job training (OJT) in the company's business-development function between March and May 2026. The paper describes the sequence of activities involved in acquiring business customers and franchise partners: prospect identification, field and telephonic contact, requirement discovery, service explanation, rate proposal, objection handling, follow-up, and conversion. These activities are interpreted through the sales funnel, segmentation-targeting-positioning, the extended services marketing mix, relationship marketing, and the AIDA model. The study follows a descriptive, exploratory design based on participant observation, prospect interactions, and the author's learning diary and fortnightly progress reports; purposive sampling was used. The observations suggest that structured follow-up, need-based service explanation, and pre-contact research on the prospect were associated with more productive prospect conversations, while inconsistent responses, limited access to decision-makers, and competition from larger national carriers were the main difficulties. No audited company figures were available, so the paper does not report conversion rates or claim causal effects. It offers a process framework, six propositions, and practical recommendations for small and regional courier firms.

Keywords: sales and lead generation; courier and logistics; customer acquisition; B2B marketing; franchise development; relationship marketing; India

1. Introduction

Courier and logistics services connect businesses, retailers, and households by supporting the collection, transport, tracking, and delivery of documents and parcels. The growth of e-commerce, small online sellers, and small and medium enterprises (SMEs) has increased demand for reliable parcel movement. A courier service is, however, intangible at the point of sale: a customer cannot inspect delivery performance before using it. Trust, responsiveness, and clear communication from the sales representative therefore form an important part of the value proposition.



Appan Courier operates in this market from Pune, Maharashtra. As explained to the author during the internship, the company is a privately held courier and logistics organisation offering domestic courier and express services, e-commerce support, and a courier franchise model for business partners. The author was placed with the business-development team as an intern and took part in prospect identification, field visits, customer communication, follow-up, and franchise-partner outreach. This paper organises that experience into a structured account of how a regional courier firm acquires customers and partners, and links it to established marketing concepts.

1.1 Problem Statement

Regional courier firms compete with large national carriers that have greater brand recognition and network reach. In this setting, leads may be lost when prospects are poorly qualified, shipment requirements are not understood, the service is explained in operational rather than customer terms, or follow-up is inconsistent. The problem addressed here is how sales and lead-generation activities in a regional courier business can be organised into a systematic, customer-oriented acquisition process.

1.2 Research Objectives

- To describe the business-development process followed at Appan Courier, from lead identification to conversion.
- To examine lead-generation and customer-acquisition practices, including field visits, telephonic and online outreach, and referrals.
- To understand the role of digital and local marketing in generating business opportunities.
- To analyse customer interaction and follow-up practices and the challenges encountered.
- To propose practical improvements to lead management, follow-up, and partner development.

2. Literature Review

Relationship marketing emphasises trust, cooperation, and continued interaction rather than isolated transactions. Anderson and Narus (1990) modelled working partnerships between firms and showed why business relationships are better understood in terms of cooperation and relationship quality. Morgan and Hunt (1994) identified trust and commitment as central to successful relationship marketing. Both ideas are relevant to courier sales, where a prospect is asked to entrust time-sensitive shipments to a provider it has not yet used.

Service intangibility makes quality difficult to judge before purchase. Parasuraman, Zeithaml, and Berry (1985) proposed a conceptual model in which gaps between customer expectations and delivered service explain perceived quality. In logistics, Gupta et al. (2023) studied the relationship between service quality dimensions and customer satisfaction among Indian logistics service providers, and Kusumawardani and Hastayanti (2020) examined how perceived service quality and logistics service innovation relate to repurchase intention for instant courier services through satisfaction and trust. Together these studies suggest that reliability, responsiveness, and trust matter to courier customers, and that sales communication can set realistic expectations early.

Standard marketing frameworks also inform the analysis. The sales funnel describes progressive narrowing from awareness to purchase. Segmentation, targeting, and positioning (STP) guides the choice of customer groups, and the extended marketing mix for services adds people, process, and physical evidence to the four Ps (Kotler & Keller, 2016). The AIDA model (attention, interest, desire, action) is widely used to structure sales communication. In business-to-business (B2B) settings, longer decision cycles, several decision-makers, and consultative selling are typical.

2.1 Research Gap

Relationship marketing and service-quality research provide strong theoretical foundations, but they say little about the day-to-day sales process of small and regional courier firms. In particular, few accounts connect field-based lead generation, requirement discovery, follow-up, and franchise-partner development within one process. This paper proposes such a framework from a practice-based case.



3. Research Methodology

The study uses a descriptive research design with an exploratory approach. It is based on the author's direct participation in business-development activities during the OJT, supported by company materials shared during the internship and academic sources. The study does not attempt to measure the financial or operational performance of Appan Courier. Because the observations were not collected through a standardised instrument or a verified sales dataset, the paper does not claim statistical representativeness, and company-specific counts and conversion rates are not reported.

Research element	Description
Research design	Descriptive and exploratory; practice-based case study.
Study context	Business-development function of Appan Courier, Pune, Maharashtra (courier, parcel and logistics services).
Study period	OJT from 16 March 2026 to 24 May 2026, as recorded in the author's initial information report.
Primary data	Participant observation; telephone, email, and WhatsApp interactions with prospects; field and market visits; discussions with the business-development team; interaction and follow-up records.
Secondary data	Company materials shared during the internship; logistics-sector information; journal articles.
Sampling	Purposive sampling of business prospects likely to have recurring shipment needs: e-commerce sellers, retailers, SMEs, shops, and corporate offices. Prospects handled during the OJT formed the sample; no statistical sample size was calculated.
Recording of observations	Learning diary and fortnightly progress reports prepared under the university OJT process.
Analysis method	Qualitative reflection and conceptual process mapping; no statistical analysis.

4. Conceptual Framework

Lead Generation → Qualification → Requirement Discovery → Service Explanation and Rate Proposal → Objection Handling → Follow-up → Conversion → Service Experience → Retention / Referral

The framework treats acquisition as a sequence of connected stages. Lead generation draws on field visits, outbound calls, digital enquiries, and referrals. Qualification screens prospects on shipment volume and frequency, decision-making authority, and timeline. Requirement discovery establishes shipment type, destinations, turnaround expectations, and cash-on-delivery (COD) needs, which then shape the service explanation and rate proposal. Follow-up maintains continuity until a decision is made, and post-sale service experience may support retention and referrals. A parallel track applies to franchise partners, who evaluate investment, earning potential, location suitability, and operational support rather than shipment needs. These are proposed relationships and are not presented as empirically confirmed.

Proposition 1: Lead qualification may help identify prospects whose shipment needs fit the courier service.

Proposition 2: A service explanation tailored to the prospect's business type and requirements may be more relevant than a generic pitch.

Proposition 3: Timely and structured follow-up may support continuity and keep prospects engaged during longer B2B decision cycles.



Proposition 4: Trust, responsiveness, and clear communication may increase customer confidence in an intangible service.

Proposition 5: Satisfactory early service experiences may encourage repeat business and referrals.

Proposition 6: Clear information on investment, support, and location suitability may help franchise prospects evaluate the partnership opportunity.

5. Analysis and Discussion

This section presents the author's practice-based observations. They are reflections informed by the conceptual framework and are not verified measurements of Appan Courier's performance.

5.1 Lead Generation and Qualification

Leads came from field visits to clothing shops, medical stores, gift and jewellery shops, and corporate offices, from outbound calls and messages, from digital enquiries, and from referrals within the team. Approaching businesses with the same pitch proved ineffective. Shipment frequency, destinations, type of material, urgency, and existing courier arrangements differed across segments, so qualification before a detailed pitch made effort more productive. In line with STP, e-commerce sellers, retailers, and SMEs with recurring parcel needs were the most relevant targets.

5.2 Customer Decision Factors

Factor	Observed relevance in courier purchasing
Reliability and delivery reach	Prospects asked whether their destinations were served and whether delivery would be dependable.
Price and value	Prospects compared rates with existing providers and asked for quotations.
Pickup, tracking, and COD support	Convenience features were important, especially for sellers and retailers.
Trust and credibility	A new or smaller provider had to establish confidence before prospects would switch or trial it.
Responsiveness and follow-up	Prompt answers on rates, documents, and next steps helped maintain interest.

5.3 Requirement Discovery, Service Explanation and Follow-up

Asking discovery questions before presenting services improved the relevance of conversations. Explaining rate slabs, delivery timelines, and COD remittance cycles in terms of the prospect's own business, rather than operational jargon, made the offer easier to evaluate. Many prospects did not respond promptly or asked for time, so a structured follow-up cadence across calls, email, and WhatsApp was needed. Where records were kept consistently, follow-up was more reliable; where tracking was manual, the risk of neglected leads increased. These observations are consistent with Propositions 2 and 3.

5.4 Franchise Partner Development

Approaching prospective franchise partners differed from selling courier services. These prospects focused on investment, expected earnings, operational support, location, and business risk. Explaining the booking and delivery-point models clearly, and following up with prospects who needed time, were central. This supports a distinction between customer-sale and partner-sale conversations within a single business-development function (Proposition 6).



5.5 Challenges and Responses

Challenge	Response adopted
Inconsistent or delayed prospect response	Structured follow-up with reminders and re-engagement across call, email, and WhatsApp.
Difficulty reaching decision-makers	Pre-contact research on the business and requests for introductions from initial contacts.
Differentiating from larger national carriers	Pitches emphasising reliability, responsiveness, and local service rather than generic feature lists.
Balancing outreach volume with follow-up quality	Prioritising qualified leads for deeper follow-up over high volumes of unqualified contacts.
Limited domain knowledge at the start	Regular study of service offerings and sector context alongside daily tasks.

5.6 Discussion

Overall, the observations are consistent with a funnel-based view of acquisition in which prospects drop out at successive stages and long B2B decision cycles leave many prospects unresolved at any given time. They also fit the relationship-marketing emphasis on trust and continuity. As a regional provider, Appan Courier cannot rely on brand recognition or network scale; responsiveness, clear explanation, and consistent follow-up are the levers available to a sales team. The OJT report also contained illustrative funnel and activity charts prepared for academic formatting; as these were not verified company data, they are excluded here.

6. Practical Implications

- Use a consistent lead-qualification checklist covering shipment volume and frequency, destinations, COD needs, decision-making authority, and timeline.
- Adopt a simple CRM pipeline recording each prospect's stage, last contact, next action, and expected decision date, replacing manual tracking.
- Prepare segment-specific pitch material for e-commerce sellers, retailers, and SMEs, and a separate information pack for franchise prospects.
- Use consultative selling: ask discovery questions first, then explain the service in terms of the prospect's own needs.
- Introduce scheduled reminders or lightweight automation for follow-up messages to interested prospects.
- Strengthen local digital presence and formalise a referral programme with existing clients to build warm introductions.
- Track defined indicators such as prospects contacted, qualified leads, proposals shared, conversions, repeat shipments, and referrals, and review them weekly or monthly.

7. Limitations and Future Research

The study rests on a single company, a short internship period, and the author's assigned responsibilities, so it cannot be generalised to all courier firms or to Appan Courier's full marketing strategy. Access to confidential financial information and customer lists was restricted, observations were not collected through a standardised instrument, and prospect responses may reflect unobserved factors such as timing, budgets, and competing vendor conversations. The short period also meant that long-cycle B2B decisions could not be observed to completion. The paper is therefore a reflective, practice-based study rather than a completed empirical evaluation. Future work could, with company permission and



ethical clearance, use anonymised CRM or sales-funnel records, structured interviews with customers and franchise partners, or comparative cases across regional couriers to test the propositions.

8. Conclusion

This paper organised an OJT experience at Appan Courier into a process view of sales and lead generation in a regional courier business, covering lead qualification, requirement discovery, service explanation, follow-up, and franchise-partner development. The observations suggest that need-based communication, structured follow-up, and pre-contact research support more productive prospect engagement, and that trust and responsiveness are central for a smaller provider competing with national carriers. Because the paper relies on practice-based observation without a verified dataset, these points are practical reflections and recommendations rather than measured outcomes. Further research with documented methods and appropriate permissions is needed to test the proposed relationships.

Declarations

Ethics approval and consent to participate. This study is based on the author's observations during an on-the-job training placement. No formal survey or interview with research participants was conducted, and no personal or identifiable data of any prospect, customer, or franchise partner are reported. Formal ethics approval was therefore not required.

Consent for publication. Not applicable. The paper contains no identifiable participant information or confidential company material, and the company is referred to only by its publicly available name.

Data availability statement. No new dataset was generated or analysed. The paper draws on publicly available sources and the author's qualitative observations; internal company records are confidential and cannot be shared.

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