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# Field Marketing and Personal Selling for B2B SaaS Onboarding in an Unorganised Market: A Case Study of PG Hub India at Vinorise Technologies, Pune

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## Abstract

**Purpose:** Independent Paying Guest (PG) accommodation owners in India mostly run their businesses on registers, spreadsheets and WhatsApp, and few actively search for management software. This paper examines how direct field marketing and personal selling (outbound calls, site visits, live demonstrations and structured follow-up) drive awareness and onboarding of PG owners onto PG Hub India, a PG-management software product.

**Design/methodology:** A descriptive, field-based case study was carried out during an on-the-job training at Vinorise Technologies, Hinjewadi, Pune (12 May – 12 August 2026). Quantitative funnel data (owners contacted, demonstrations given, owners onboarded) were recorded by locality for Hinjewadi, Wakad, Baner and other areas, using convenience sampling. These were supported by participant observation of owner profiles, pain points and objections. Funnel rates were computed with 95% Wilson confidence intervals.

**Findings:** Of 240 owners contacted, 171 (71.3%) received a live demonstration and 12 (5.0%; 95% CI 2.9%–8.5%) were onboarded, equal to 7.0% of owners who saw a demonstration. The firm's working target was about 10%. Roughly 20 owners had to be contacted per onboarding. Conversion was highest in Wakad (6.0%) and Hinjewadi (5.3%) and lowest in Baner (3.3%), but locality differences were not statistically significant. Observation indicated that owners responded more to pain-point-led demonstrations than to feature lists, that trust in the individual salesperson was important, and that most owners needed more than one interaction before deciding.

**Originality/value:** Evidence on how small-business software is sold in fragmented, relationship-driven Indian markets is scarce. The paper provides a transparent funnel benchmark, a mapping of AIDA and SPIN to field activity, and practical recommendations for early-stage SaaS firms.

**Keywords:** field marketing; personal selling; B2B SaaS; PropTech; PG accommodation; owner onboarding; lead conversion; India

## 1. Introduction

India's PropTech sector has grown as owners, tenants and managers look for digital alternatives to paper-heavy property management. Within it, PG and co-living accommodation serves a large population of students and young professionals who migrate to education and IT hubs such as Pune's Hinjewadi–Wakad–Baner corridor. Branded co-living operators have expanded quickly, yet most PG properties are still owned and run independently by small operators, and industry reports describe the segment as predominantly unorganised and informal (FICCI, 2019). These owners often handle tenant records, rent collection and vacancy tracking manually.



This creates an opportunity for purpose-built software, but also a go-to-market problem. The buyers are small, time-constrained owner-operators with low switching costs (free tools such as spreadsheets and WhatsApp already "work"), high price sensitivity and limited awareness that the software category exists. Digital advertising alone is unlikely to reach them, because many are not searching for a solution. A push-oriented, relationship-based approach is therefore a natural choice for a young product with little brand recognition.

This study examines that approach in practice at Vinorise Technologies, a Pune-based technology company that offers PG Hub India, a platform covering PG listing, tenant records, room and bed availability, rent collection and reminders, expense and staff tracking and tenant communication. The paper addresses three research questions:

- RQ1. What role does direct field marketing (calls and site visits) play in creating awareness of PG Hub India among independent PG owners in Pune?
- RQ2. What current management practices and pain points shape owners' interest in PG-management software?
- RQ3. How do live demonstrations and structured follow-up relate to the conversion of interested owners into onboarded users?

## 2. Theoretical Background

### 2.1 B2B buying by small owner-operators

PG owners behave as small-business buyers making an infrequent but operationally significant purchase. Their decisions depend on perceived time and cost savings compared with current processes, ease of use, price relative to the number of rooms managed, and trust in both the vendor and the person demonstrating the product (Kotler & Keller, 2016). Trust is widely regarded as central to buyer–seller relationships (Morgan & Hunt, 1994; Doney & Cannon, 1997; Palmatier et al., 2006), and for owner-operators without procurement departments it often attaches to the individual salesperson as much as to the brand.

### 2.2 AIDA and SPIN

The AIDA model describes how persuasion moves through Attention, Interest, Desire and Action (Strong, 1925). SPIN selling structures a consultative conversation around Situation, Problem, Implication and Need-payoff questions (Rackham, 1988). Together they suit a pain-point-led pitch: understand how the owner currently manages the PG, surface the problem (missed rent, no vacancy visibility), show the implication (lost revenue, tenant disputes) and then demonstrate the product as the payoff.

### 2.3 Diffusion of innovations and the adoption chasm

Rogers (2003) classifies adopters from innovators to laggards. Tech-comfortable owners of several properties tend to act as early adopters, while traditional single-property owners behave more like the late majority and need reassurance and hands-on proof. Moore (1991) argues that moving from early adopters to the mainstream requires a different and more reassuring approach, which is relevant to a product that is still category-creating.

### 2.4 Push marketing, pricing and retention

A push strategy relies on the seller approaching the customer, which is typical where category awareness is still developing. Subscription (SaaS) pricing is most persuasive when framed against the ongoing value delivered, such as time saved and revenue protected, and profitability depends on retaining subscribers beyond the first sale (Reichheld & Sasser, 1990). This makes realistic expectation-setting during onboarding important, since over-selling risks early churn.

### 2.5 Research gap

Research on small-business technology adoption is substantial. Studies of SME cloud and software-as-a-service adoption identify a range of technological, organisational and environmental determinants (Hassan et al., 2017; Holler & Westner, 2025). Evidence from developing economies points to performance expectancy, effort expectancy, data security and privacy, and perceived trust as significant predictors of adoption (Khayer et al., 2021), and to the



decision-maker's trust in the technology (Safari et al., 2015). Work on services selling similarly links salesperson behaviour to relationship quality, including trust (Crosby et al., 1990). These studies are largely survey-based and examine adopter intentions. Much less is documented from the seller's side: how field-based personal selling performs, stage by stage, when software is sold to micro owner-operators in unorganised Indian segments. This study addresses that gap by reporting an observed outreach funnel from a working firm.

## 3. Research Methodology

### 3.1 Design and setting

The study follows a descriptive, field-based case-study design with an exploratory component. It was conducted during an on-the-job training at Vinorise Technologies (12 May – 12 August 2026) under the supervision of the company's director. The intern worked on outbound calling, field visits, live demonstrations, follow-up and onboarding for PG Hub India.

### 3.2 Task and process flow

Each owner engagement followed a consistent sequence: prospecting (from listings, referrals, local directories and company-provided leads), outbound call, field visit, pain-point-led product demonstration, objection handling and scheduled follow-up, and finally account set-up and initial data entry for owners who agreed. The working target was 20–30 property visits per week, with an explanation of the software to each owner met, and a lead-to-onboarding conversion expectation of about 1 in 10.

### 3.3 Data and sampling

Quantitative data were the number of owners contacted, demonstrations given and owners onboarded in each locality, recorded in an owner/lead database. Qualitative data were field observations of owner profiles, current practices, pain points and objections, recorded during calls and visits. The sampling frame was PG owners and operators in Hinjewadi, Wakad, Baner and adjoining Pune localities, selected by convenience sampling from calling lists and visit schedules. Secondary data came from company training material and product documentation.

### 3.4 Analysis

Funnel stage rates were computed as simple proportions. Uncertainty was expressed with 95% Wilson score confidence intervals (Wilson, 1927). Differences between localities were tested with Fisher's exact test because of small cell counts. Qualitative observations are reported descriptively and are not treated as statistical evidence.

## 4. Results

### 4.1 Outreach funnel

| Locality | Owners contacted | Demonstrations given | Demo rate (% of contacted) | Owners onboarded | Onboarded (% of contacted) | Onboarded (% of demos) |
|---|---|---|---|---|---|---|
| Hinjewadi | 150 | 100 | 66.7 | 8 | 5.3 | 8.0 |
| Wakad | 50 | 38 | 76.0 | 3 | 6.0 | 7.9 |
| Baner | 30 | 29 | 96.7 | 1 | 3.3 | 3.4 |
| Other localities | 10 | 4 | 40.0 | 0 | 0.0 | 0.0 |
| Total | 240 | 171 | 71.3 | 12 | 5.0 | 7.0 |

*Table 1. Locality-wise outreach funnel*



| Measure | Value | 95% CI |
|---|---|---|
| Owners onboarded per owner contacted (12 / 240) | 5.0% | 2.9% – 8.5% |
| Owners onboarded per demonstration (12 / 171) | 7.0% | 4.1% – 11.9% |
| Owners contacted per onboarding | 20.0 | – |
| Demonstrations per onboarding | 14.3 | – |

*Table 2. Overall conversion with 95% confidence intervals*

At the assigned pace of 20–30 visits per week, one onboarding therefore required roughly 0.7 to 1.0 weeks of full-target field effort. The organisation's working target of about 10% lies outside the 95% interval for owners contacted and above the interval for demonstrations, so the target was not reached in this sample.

Hinjewadi supplied 62.5% of contacts and two-thirds of onboardings (8 of 12). Differences in conversion across localities were not statistically significant (Hinjewadi versus all other localities: Fisher's exact $p = 1.00$ for onboarded per contacted and $p = 0.76$ for onboarded per demonstration). Hinjewadi's demonstration rate (66.7%) was lower than the 78.9% in the other localities combined, a difference that was borderline ($p = 0.055$). Baner showed the highest demonstration rate (96.7%) but the lowest conversion among localities with any onboardings.

### 4.2 Current practices and awareness (RQ1 and RQ2)

Most owners met were managing their properties with registers, notebooks, phone calls, WhatsApp messages and manual records. Tenant details, room availability, rent collection, deposits and bookings were often kept separately, which made tracking difficult. Rent tracking and tenant record-keeping were the pain points cited most often. Many owners had never heard of PG-management software, so part of each conversation had to be spent explaining the category rather than the product, which lengthened the sales cycle. These observations were not coded into frequencies and should be read as qualitative.

### 4.3 Owner profiles

| Owner profile | Observed behaviour | Effective approach |
|---|---|---|
| Tech-comfortable multi-property owners | Fastest to see value; often already used a digital tool | Show clear improvements over the current tool; demonstrate multi-property dashboards |
| Traditional single-property owners | Relied on manual registers; needed time and reassurance | Simplified demonstration focused on ease of use rather than advanced features |
| Owners with another primary occupation | Time-constrained and hard to reach | Flexible visit timing and scheduled follow-ups |

*Table 3. Observed owner profiles and the engagement approach each required*

### 4.4 Demonstration and follow-up (RQ3)

Every owner who received a demonstration saw the app on a phone using their own property's context. Owners became more interested when the demonstration was sequenced around the pain point they had described, for example opening with rent reminders for an owner struggling with late payments or with the vacancy dashboard for an owner unsure of occupancy. Owners who saw the app demonstrated personally appeared more receptive than those who were only told about it by phone, though no controlled comparison was recorded. Many interested owners did not decide at first contact because they needed more time, more clarity or approval from a co-owner or family member. These leads were placed in a structured follow-up cycle rather than treated as lost.



### 4.5 Challenges and responses

| Challenge | How it was addressed |
|---|---|
| Reluctance to change from manual processes | Pitch built on specific pain points (missed rent, disputes over records) rather than a feature list |
| Price sensitivity among small owners | Subscription cost framed against time and revenue saved |
| Trust and data-security concerns about tenant data | Reassurance on data handling and security |
| Difficulty reaching owners by phone | Repeated call attempts and flexible visit timing |
| Peak move-in and move-out periods | Outreach timing adjusted around busy periods |
| Geographic spread of properties | Route planning to cover more owners per day |
| New product category | Time spent explaining the category before the product |

*Table 4. Principal objections and how they were handled*

## 5. Discussion

The funnel shows that field marketing is effective at reaching owners: more than seven in ten contacted owners received a full demonstration. Converting them is harder. About one in twenty owners contacted, and one in fourteen of those who saw the product, became customers. These figures are below the firm's 10% expectation, but the confidence intervals are wide and a single-intern sample cannot settle what the true rate is.

The pattern fits the theory. In an unorganised market where few owners search for software, a push strategy is the practical way to create awareness (RQ1). The pain points owners described, mainly rent tracking and record-keeping, match the SPIN logic of beginning with the owner's situation and problem, and the observed preference for pain-point-led demonstrations is consistent with AIDA's move from interest to desire. Variation among owners mirrors the diffusion pattern: multi-property, tech-comfortable owners converted most readily, while traditional single-property owners needed reassurance and simplified demonstrations (RQ2).

The locality results are informative but should not be over-read. Baner combined near-universal demonstrations with the lowest conversion, which suggests that demonstrating to everyone is not the same as demonstrating to the right owners. Lead qualification (profile, number of properties, current tool, decision-maker) may matter more than demonstration volume, a hypothesis for future testing. The estimate that two in three onboardings came from Hinjewadi mainly reflects that most contacts were made there.

On RQ3, the observations support the view that demonstration and follow-up work together. Because many owners needed time or a co-decision-maker, a single call or visit is a poor test of interest. Trust in the individual representative and realistic expectation-setting during onboarding matter for retention as well as for conversion (Reichheld & Sasser, 1990).

The trust and data-security objections raised by some owners are consistent with SME adoption studies that identify perceived trust, data security and privacy, and the decision-maker's trust as significant adoption factors (Khayer et al., 2021; Safari et al., 2015). The field observations suggest that, for micro owner-operators, these concerns are addressed through personal reassurance by the representative as much as through product features.



## 6. Managerial Implications

**1. Qualify leads before demonstrating. Record owner profile, number of properties, current tool and decision-maker, and prioritise owners with the strongest need.**

**2. Institute a fixed follow-up cadence (for example every 5–7 days) in a shared lead-tracking tool, so that interested but undecided owners are not lost.**

**3. Standardise a pain-point-led demonstration script so that new field marketers can be trained quickly and delivery is consistent.**

**4. Introduce referral incentives for onboarded owners, using peer influence among owners in the same locality.**

**5. Provide simple localised explainer material in Marathi and Hindi for owners less comfortable with English pitches.**

**6. Expand to additional PG-dense localities using the validated approach, and review conversion data weekly by locality and owner profile.**

**7. Address trust and compliance concerns explicitly. Platforms that store tenant data must meet the obligations under India's Digital Personal Data Protection Act, 2023, and clear communication on data handling can reduce a common objection.**

## 7. Limitations and Future Research

The study covers a limited set of Pune localities and a single intern's field activity, so it is a directional case study and not a statistically representative one. Convenience sampling was used. Only 12 onboardings were observed, which makes all conversion estimates imprecise and prevents reliable inference on locality differences. Qualitative observations (owner profiles, pain points, the effect of live demonstration) were not systematically coded or compared against a control group. The study concerns owners, not tenants, and onboarding was the only outcome measured, so post-onboarding usage and retention are unknown.

Future research could use a structured owner survey with coded pain points and objections, compare demonstration-led visits with call-only outreach, record the cost per onboarding, extend the work to other cities, and follow onboarded owners over a longer period to measure usage and retention.

## 8. Conclusion

Selling software to independent PG owners is a relationship-driven process. Direct field engagement reached a large share of owners and gave most of them a live demonstration, but only about 5% of contacted owners, and 7% of those who saw a demonstration, were onboarded within the study period. Conversion depended on understanding each owner's problem, demonstrating value in their own context, building personal trust and following up consistently. For an early-stage SaaS firm in an unorganised market, field marketing is effective for awareness and a credible route to early customers, provided it is supported by lead qualification, disciplined follow-up and realistic expectation-setting.

## Declarations

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**Conflict of interest:** The first author undertook the work as an intern at the company studied.

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**Data availability:** Aggregated funnel data are provided in Table 1; the owner-level database is confidential.



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