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Sales and Marketing Strategies for Customer Acquisition at ClearTax

Chaitali Biswas[1*], Mukesh T.[2]

[1,2]*Post Graduate Diploma in Management, Dayananda Sagar Business School (DSBS)*

[*]*Corresponding author*

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Abstract

This internship project, titled "Sales and Marketing Strategies for Customer Acquisition at ClearTax," was carried out during a three-month internship at ClearTax, one of India's leading fintech SaaS companies. ClearTax provides solutions in tax filing, GST compliance, business management, and investments. The main aim of the project was to understand how sales and marketing strategies can be effectively designed to acquire new customers and strengthen the company's market presence.

In today's fast-paced fintech and SaaS environment, customer acquisition is a key challenge. ClearTax primarily relies on inside sales—a model that allows sales teams to connect with potential clients remotely, saving time and cost while reaching a wider audience. However, the effectiveness of these efforts depends heavily on understanding customer behavior, needs, motivations, and decision-making patterns. Without this understanding, even well-designed sales strategies may not convert potential clients into actual customers.

During this project, both existing and potential ClearTax clients were analyzed to identify the factors that influence their decisions to choose ClearTax's services. The study looked into customer preferences, buying triggers, pain points, and the effectiveness of current sales and marketing activities. By doing this, the project sought to provide insights on aligning sales and marketing efforts more closely with customer expectations.

Based on the findings, several recommendations were proposed:

Buyer-centric training for sales executives: Equipping the sales team with knowledge about customer behavior can help them engage more effectively.

Targeted marketing strategies: Creating campaigns that speak to the specific needs and interests of different customer segments can improve engagement and conversion.

Structured engagement approach: Implementing a clear process to nurture leads throughout the sales journey ensures better customer acquisition results.

Overall, this project highlights the importance of combining sales expertise with marketing insights to attract and retain customers. The insights and recommendations provided aim to help ClearTax strengthen its sales approach, improve customer engagement, and achieve sustainable growth in a competitive market.

CHAPTER 1: INTRODUCTION

1.1 INTRODUCTION

In today's highly competitive business environment, companies are constantly looking for effective ways to attract and retain customers. With changing customer expectations, digital transformation, and the rise of innovative business models such as **Software-as-a-Service (SaaS)**, organizations must design strategies that go beyond traditional selling. In the fintech space, this shift is even more evident, as customers now prefer **digital-first platforms** that offer speed, transparency, and convenience.

For a company like **ClearTax**, one of India's leading fintech SaaS providers, customer acquisition is not just about selling products but about **building trust and offering value-driven solutions**. ClearTax provides tax filing services, GST compliance, investment planning, and business-related financial solutions. These services address both **individual customers (B2C)** and **business clients (B2B)**, making customer acquisition strategies central to the company's growth.

Sales and marketing strategies work together to support customer acquisition. While marketing creates awareness, builds brand perception, and generates leads, sales focuses on nurturing those leads and converting them into long-term customers. In the case of ClearTax, strategies include digital marketing campaigns, brand positioning, pricing models, personalized sales pitches, and trust-building initiatives. This study focuses on how ClearTax applies different sales and marketing strategies to acquire customers in both B2C and B2B segments, and how these strategies can be refined to improve conversions, customer satisfaction, and loyalty.

SCOPE AND IMPORTANCE OF THE STUDY

This study has been undertaken during my three-month internship at **ClearTax**, one of India's leading fintech SaaS companies specializing in tax filing, GST compliance, investment solutions, and business management software. As an **Inside Sales Executive**, my responsibilities involved direct interaction with both individuals and business clients. The experience allowed me to understand customer requirements, handle queries, resolve objections, and guide prospects through the sales funnel.

These insights form the foundation of this study, which focuses on **Sales and Marketing Strategies for Customer Acquisition at ClearTax**.

Scope of the Study:

The scope of the study extends across multiple dimensions of sales and marketing strategies adopted by ClearTax.

Sales Strategies

Lead Nurturing: The process of engaging prospects through continuous communication and providing them with relevant information to keep them interested until they are ready to convert.

Personalized Communication: Offering customized solutions based on the client’s profile, needs, and preferences to build trust and relevance.

Follow-ups and Conversion Techniques: Using structured follow-up calls, emails, and reminders to ensure prospects move forward in their buying journey. Different persuasion methods and consultative selling approaches were analyzed to measure their effectiveness in customer conversion.

Marketing Strategies

Brand Positioning: The way ClearTax positions itself as a reliable, technology-driven, and customer-friendly brand in the highly competitive fintech space.

Digital Outreach: Leveraging digital platforms such as Google Ads, search engine optimization (SEO), and online campaigns to reach target customers.

Social Media Presence: Using platforms like LinkedIn, Instagram, Facebook, and Twitter to engage with customers, build awareness, and create a brand recall.

Pricing Policies: How flexible pricing and package deals act as a key motivator for customer acquisition, especially for small businesses and startups.

Customer Education Campaigns: Through webinars, tutorials, blogs, and FAQs, ClearTax not only markets its products but also educates customers about compliance and financial literacy, making its offerings more attractive.

Customer-Centric Factors

Trust and Transparency: The role of trust in financial transactions and compliance-related services is crucial. Customers evaluate whether they can rely on ClearTax to securely handle sensitive data.

Brand Perception: How customers perceive ClearTax in terms of credibility, ease of use, and innovation directly influences their purchase decisions.

Value-for-Money: In a price-sensitive market like India, the perception that ClearTax provides more value than its competitors can significantly improve conversion rates.

Overall, the scope is not limited to understanding just sales performance but also covers the interrelationship between marketing efforts, customer behavior, and organizational positioning.

Importance of the Study

The significance of this study can be understood from multiple perspectives:

Organizational Relevance: For ClearTax, customer acquisition is at the core of its growth strategy. The insights from this study highlight how the company can align sales and marketing approaches to reduce the cost of acquisition, improve customer lifetime value, and maintain a competitive edge in the fintech sector.

Strategic Insights: The findings provide evidence on how digital-first companies can scale sustainably by combining **customer behavior insights** with targeted sales and marketing strategies. This includes creating a seamless customer journey where marketing generates quality leads and sales ensures effective closure.

Practical Implications: For sales executives and marketing teams, the study identifies actionable strategies—such as the importance of follow-ups, consultative selling, and transparent communication—that can directly impact conversion rates.

Industry Contribution: The study contributes to the broader fintech ecosystem by showing how companies can build customer trust in a digital-first model, where face-to-face interactions are limited. It emphasizes the importance of balancing technology with a human touch in sales conversations.

Academic Relevance: From a management perspective, the study serves as a real-world application of concepts such as **buyer behavior, customer relationship management, marketing mix strategies, and brand positioning**. It bridges the gap between theoretical knowledge and practical industry applications.

REVIEW OF LITERATURE

Customer acquisition has always been a central concern for organizations, but with the rapid digital transformation of businesses, the role of sales and marketing strategies has become more dynamic and complex. Several scholars and industry practitioners have examined the evolving role of marketing, sales, and consumer behavior in shaping acquisition strategies. The following review brings together some of the key contributions from literature and industry reports relevant to this study.

Marketing and Customer-Centric Strategies

Kotler & Keller (2009) emphasize that effective marketing strategies, such as **positioning, branding, and customer-centric campaigns**, are critical for creating customer trust and influencing purchase decisions. Their work underlines that organizations cannot rely solely on product features or price but must also build a strong perception of value in the minds of customers. This is particularly important in competitive industries like fintech, where customers seek reliability, ease of use, and assurance of data security.

Aaker (1996) contributes to this discussion by focusing on the concept of **brand equity**. According to him, strong brand equity creates familiarity, reduces perceived risk, and builds loyalty, which directly supports customer acquisition. In the context of ClearTax, where trust in handling sensitive financial data is essential, brand equity becomes a crucial driver of conversions.

The Shift Toward Digital Sales

Moncrief (2017) identifies a major transformation in sales processes, shifting from traditional face-to-face interactions to **digital-first and inside sales models**. He notes that organizations must design sales strategies that leverage technology, data, and digital touchpoints to engage customers effectively. This finding resonates strongly with the fintech sector, where inside sales, webinars, and online demos are now more common than physical meetings.

Gartner (2021) reinforces this point by reporting that **over 50% of SaaS revenue is now generated through inside sales teams**. This highlights not only the effectiveness of digital sales channels but also the need for organizations to invest in skilled inside sales teams who can nurture leads, provide timely responses, and close deals remotely.

HubSpot Sales Trends Report (2020) further reveals that today’s customers expect **transparency in the sales process**, including clear communication about pricing, product features, and value. Customers are less receptive to aggressive selling tactics and more inclined to trust brands that provide honest, value-driven communication.

Trust, Behavior, and Decision-Making

Gefen (2000) stresses the importance of **trust in online transactions**, especially in industries dealing with sensitive customer data such as finance, compliance, and taxation. His study indicates that without trust, even the best marketing campaigns or competitive pricing may fail to convert customers. This aligns closely with ClearTax’s business model, where secure handling of tax and financial information is a fundamental expectation.

Thaler & Sunstein (2008), in their work on behavioral economics, introduce the concept of **nudges**. They argue that small changes in the way options are presented—such as limited-time offers, testimonials, simplified pricing displays, or personalized messages—can significantly influence customer decisions. For fintech companies, applying behavioral nudges can help reduce hesitation and speed up the conversion process.

Muzumdar, Basyal & Vyas (2021) add that a **customer-oriented and non-aggressive sales approach** enhances trust and strengthens the relationship between the brand and the customer. They suggest that customers today prefer brands that act as consultants or advisors rather than pushy sales representatives. This insight is especially valuable for companies like ClearTax, where customer confidence and advisory-style selling are critical to building long-term relationships.

Synthesis of Literature

Taken together, these studies underline that **successful customer acquisition is no longer dependent on isolated sales tactics or generic marketing campaigns**. Instead, it is the result of an **integrated approach** where digital tools, brand trust, and adaptive selling strategies come together to create a seamless customer journey. The literature highlights three recurring themes:

Trust and Brand Equity – Customers make decisions based not only on product features but also on their perception of the brand's credibility and reliability.

Digital-First Engagement – The dominance of inside sales and online channels requires organizations to adopt strategies that resonate with digitally savvy customers.

Customer-Centric and Behavioral Approaches – Transparency, personalization, and the use of behavioral nudges are critical in guiding customers toward conversion.

OBJECTIVES OF THE STUDY

The primary objective of this study is to analyze how **ClearTax uses sales and marketing strategies to acquire customers** and how these strategies can be improved for better outcomes.

Specific objectives include:

- To study ClearTax's sales strategies for acquiring both B2C and B2B customers.

- To examine marketing strategies such as branding, digital marketing, and pricing in driving customer acquisition.

- To identify customer behavior factors (trust, price sensitivity, value perception) that influence acquisition outcomes.

- To recommend ways to align sales and marketing strategies for improved conversion and customer retention.

STATEMENT OF THE PROBLEM

In today's digital-first economy, businesses are operating in an environment that is both highly competitive and constantly evolving. While technology has made it easier to reach potential customers at scale, it has also created new challenges. Customers are exposed to multiple alternatives, endless promotional messages, and competing brands, which makes winning their trust and attention increasingly difficult. Unlike traditional sales models, digital interactions often lack the human touch and face-to-face rapport-building that help in building credibility. As a result, organizations must rely more heavily on brand perception, trust, and clear value communication to successfully acquire customers.

For a company like **ClearTax**, which has established itself as a leading player in the fintech sector, these challenges are very real. Despite offering reliable tax filing solutions, GST compliance tools, and other financial services, the company faces certain persistent hurdles in its **customer acquisition journey**:

Lead Drop-Offs: A significant number of prospects who initially show interest do not proceed to conversion. This indicates potential gaps in nurturing, follow-ups, or communication of value.

Price Sensitivity and Decision Delays: Many potential customers hesitate or postpone their decision due to cost concerns or the perception that alternatives might offer better value.

Limited Awareness of Benefits: While ClearTax offers a comprehensive suite of solutions, not all customers fully understand how these services can simplify their financial compliance and add long-term value to their business.

The core of the problem lies in the disconnect between marketing and sales efforts. Marketing campaigns generate visibility and awareness, but this does not always translate into actual conversions. On the other hand, the sales team often struggles to close leads if prospects are not sufficiently educated, nurtured, or convinced about the value proposition beforehand. This gap results in wasted leads, higher acquisition costs, and missed opportunities.

Bridging this gap requires a deeper alignment between marketing communication and sales execution. Marketing strategies must do more than just create awareness—they must also educate, build trust, and prepare the customer for decision-making. Similarly, sales strategies need to focus on consultative engagement, where the customer's unique needs are understood and addressed with clarity and empathy. Both functions must work hand-in-hand, supported by **data-driven customer insights**, to create a seamless journey that moves prospects smoothly from awareness to conversion.

1.3 HYPOTHESES FORMULATED

The following hypotheses were developed based on the goals and problem statement of the research to examine the relationship between the buyer behavior factors and inside sales performance at ClearTax:

To help you with your report, here is a clear and concise version of the Hypotheses Formulated section including Null Hypotheses and Alternate Hypotheses for your study!

Null Hypothesis (H_0): here is no significant relationship between ClearTax's sales and marketing strategies and its customer acquisition rate.

Hypothesis (H_1): There is a significant relationship between ClearTax's sales and marketing strategies and its customer acquisition rate.

LIMITATIONS OF THE STUDY

All research studies have limitations that can potentially impact findings, and this study of Sales and Marketing Strategies for Customer Acquisition at ClearTax is

no different. While we think these studies add value, it is critical to note the limitations in order to clarify and contextualize findings.

- It is limited to ClearTax's sales and marketing functions and does not cover other operational areas.
- The analysis is based on a three-month internship, so long-term seasonal trends may not be captured.
- Data is derived from observations, discussions, and limited internal records, which may have subjectivity.
- The study is focused on ClearTax and cannot be directly generalized across all fintech companies.

• It emphasizes digital and inside sales strategies, excluding traditional face-to-face sales models.

1.4 CHAPTER SCHEME

- Introduction
- Scope of the Study
- Importance of the Study
- Review of the literature
- Objectives of the Study
- Statement of the Problem
- Limitations of the Study

CHAPTER 2:- COMPANY PROFILE

2.1 ABOUT COMPANY

ClearTax is among India's leading fintech platforms, aimed at making taxation, compliance, and financial planning simple and seamless for individuals and businesses alike. ClearTax started with a simple goal of saying it isn't that hard to do tax filing, making it easy, transparent, and affordable. It was founded in a country where tax filing is perceived to be complicated and painful. ClearTax is a 100% online platform that offers everything from filing income tax returns, GST compliance, investment advisory, and business incorporation.

Over the years, ClearTax transformed from a simple tax-filing website into an integrated financial technology ecosystem, serving millions of users across the country. It is currently used by salaried employees, freelancers, small and medium enterprises (SMEs), and corporate players, making it one of the most prominent players in the Indian tax-tech space.

2.1.1 History

ClearTax was established in 2011 by Archit Gupta, an IIT graduate and computer science major in the US. Following his return to India, Archit found income tax filing to be tedious, paper-intensive, and confusing for most tax payers. He wanted to build a platform where anyone with a few minutes could file tax with little to no technical expertise or prior knowledge of the current laws.

At first, ClearTax gained traction with free tax-filing tools for individuals. In 2017, ClearTax witnessed a tidal wave of demand when the Goods and Services Tax (GST) was introduced in India.

When every business in India was required to start filing monthly GST returns, a (huge) demand arose for enterprises to be able to file for digital GST compliance. ClearTax quickly established itself as the preferred platform for SMEs for agreement signing and GST filing compliance. Since then, ClearTax has expanded to a suite of paid services for: tax, wealth, investment, portfolio management, business incorporation, and consulting services.

2.1.2 Departments

ClearTax operates across several departmental divisions, which include:

• Taxation and Compliance Department—composed of experts in direct and indirect taxes that design services for income tax, GST, and Corporate compliance;

• Product and Technology Department—responsible for the development of the ClearTax platform, product development and completion, and ultimately the security of users' data using advanced technology;

• Sales and Marketing Department—driving new customer acquisition via campaigns, partnerships, and inside sales;

• Customer Support Department—provides real-time user support via phone, email, and chat features and ensures the user’s issue is resolved;

• Finance and Operations Department—manages the company's internal finance, investments, and ensuring operational efficiency;

• Human Resources Department—plays a critical role in training and retaining talent because skilled professionals are particularly important in fintech companies.

2.1.3 Organisational Structure

ClearTax employs a startup-style flat organisation structure. Unlike traditional organisations that have many levels of hierarchy, ClearTax has an open culture and collaboration, with a flat organisational structure. The org chart shows the Founder and CEO at the top, followed by senior leaders responsible for product, technology, finance, compliance and marketing departments. Teams are small, and cross functional, which enables more rapid innovation and experimentation, even with products already launched. This flexibility enables ClearTax to respond quickly to changes in tax regulations and customer needs, which is a competitive advantage over more structured traditional service providers.

2.2 Range of Products and Services

ClearTax has rapidly extended its services since it launched. Its primary services are as follows:

• ITR Filing – Offers easy-to-use, step-by-step online tax-filing platform for individuals, freelancers, and salaried employees without the burden of manual documentation.

• GST Solutions – Offers automated GST return filing, invoice generation, and reconciliation services particularly useful for SMEs who are obligated to file GST monthly.

• Investment Services – Allows users to invest in mutual funds, tax-saving investments, and track their portfolios.

• Business Compliance Services – Helps entrepreneurs with company registration, TDS filing, and compliance with regulatory requirements.

• Advisory Services – Provides professional financial advice, tax planning and business advisory solutions for complex cases.

With such a broad range of services, ClearTax is more than a tax-filing portal; it's a complete financial partner.

2.3 Product Profile

ClearTax's tax filing software, a flagship product, is presented as a website and mobile app, and designed to be easy to use so that someone with minimal or no accounting knowledge can file returns. Users can upload Form 16 or link their PAN and the software will automatically prepare the tax return.

The other key product that has contributed to ClearTax's growth is the GST platform. The GST platform automates GST filing and reduces errors made with manual data entryand ensures adherence to all government stipulation. This was especially valuable to SMEs, freelancers and small businesses that do not have in-house accountants.

The investment and compliance products augment ClearTax's product suite, allowing users to manage taxes, investments and auditing rules and regulations all in one integrated manner.

2.4 Major Competitors

ClearTax is operating in an environment where they face competition from both digital players and traditional service providers including:

• TaxBuddy – Offers online tax-filing and advisory services and is growing their customer base.

• myITreturn – A digital ITR filing platform in India and one of the earliest.

• Government E-Filing Portal – Provides free e-filing, but not considered as user- friendly.

• Chartered Accountants (CAs) – Have a strong base of clients of long-standing relationships who procure their personalized financial advice.

With this mix of competition, ClearTax needs to develop its differentiation through technology, customer service and cost.

2.5 Future Plans

For the future, ClearTax is looking to evolve itself into a full financial technology ecosystem. The company stated its strategic priorities for the future include:

• Deepening AI-powered tax advisory services, so users can receive personal insights.

• Strengthening its reach to semi-urban and rural regions through awareness campaigns and low-cost solutions.

• Integrating tax filing, compliance, and investments into a single product.

• Building trust in the financial services industry, which requires prioritising data security and transparency.

Each of these actions provides insight into ClearTax's long-term vision, which is to maintain prominence in the digital taxation sector while expanding into the bigger picture of financial services.

2.6 SWOT Analysis

Strengths

- Strong brand reputation and early mover advantage in digital taxation.
- Wide service portfolio covering tax filing, GST, compliance, and investments.
- User-friendly platform supported by advanced technology.
- Backed by reputed global investors like Sequoia Capital and Y Combinator.

Weaknesses

- Revenue is heavily dependent on seasonal tax-filing periods.
- Reliance on internet access and digital literacy among users.
- Limited offline presence compared to traditional CAs.

Opportunities

- Rising digitisation and government push for e-filing.
- Expansion into rural markets with digital inclusion programs.
- Growing demand from SMEs for affordable compliance solutions.
- Potential to introduce AI-driven financial advisory and personalised tax planning.

Threats

- Strong competition from other fintech startups and government portals.
- Data privacy and cybersecurity concerns that may affect user trust.
- Reluctance among some taxpayers to shift from trusted traditional CAs.
- Frequent tax law changes requiring constant product updates.

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2.7 Conclusion

ClearTax has revolutionized the Indian perspective and approach to taxation. Originally a startup focused solely on income tax filings, it has evolved into a full-fledged fintech company with an entire suite of products: compliance, investments and advisory and become a trusted financial partner for millions of users.

ClearTax's greatest advantages are its innovation, user- centric design, and the ambit of its services. However, it still faces significant obstacles: data security, reliance on digital literacy, and competition from incumbents.

Chapter 3: METHODOLOGY AND DATA BASE

TYPE OF RESEARCH

The type of research employed for this study is descriptive research. Descriptive research characterizes the environment so that the factors affecting buyer behavior becomes more fully known and how it relates to inside sales performance. Descriptive research helps to understand existing patterns, preferences, and trends within customer buying behavior and how it relates to successful sales strategies or techniques. The research draws upon understanding of customer decisions, motivations, and buying patterns in a purely observational and analytical manner with no attempts to manipulate the environment.

In keeping with the purpose and objectives of this study, aspects of analytical research are included in order to investigate the dimensions of a relationship between buyer behavior patterns and sales performance. An example of this type of analysis would be simply relating the buyer preferences or buying frequency to product selection or the effectiveness of inside sales techniques, so that correlations can be made.

3.1 Sampling Technique

In this case, non-probability sampling utilizes convenience sampling, and judgmental sampling.

• With convenience sampling, the researcher is allowed to choose subjects who are convenient; for example: Clients who accepted a phone call from the sales team, clients who replied to an email or clients who responded as an online inquiry request.

• Judgmental sampling is used to choose subjects based on certain identifying factors; such as these buyers either bought recently from the team, they purchased multiple times or they bought from the supplier during the six months preceding the study.

This approach allows for an emphasis on sampling relevant specifications and deed to represent meaningful buyer behavior patterns, and allowing for practical data collection based on the timeframes the internship provides.

3.2 Sample Size

The study will have a sample size of 79 respondents selected from the customers of the organization in which the internship was conducted. While the

sample size could be larger, it is deemed appropriate for understanding trends in buyer behavior and generating insights relevant to inside sales performance.

The sample includes respondents across several dimensions including:

3.2.1 Demographics: Age, gender, occupation

3.2.2 Purchase history: New customers, repeat customers, and premium customers

3.2.3 Interaction channel: Email, phone, and digital

A sample this size provides a reasonable balance in understanding trends and behavior while keeping the organization of the analysis appropriate for the internship level.

3.3 Sample Design

The study uses a structured sample design to produce data that is purposeful and relevant to the objectives.

1. Segmentation by Buyer Type: Customers are segmented according to first time buyers, repeat buyers, and high value customers.

2. Segmentation by Purchase Behavior: Customers are segmented using information on purchase frequency, purchase preferences, and promotional activity response.

3. Segmentation by Point of Contact: Comparative insights are gained from customers using telephonic, digital or electronic contact channels.

In structured sample design, the researcher is able to compare behavior across buyer groups and capture trends that influence sales performance.

3.4 Source of Data

Primary Data:

Obtained via questionnaires and telephone interviews with chosen customers.

3.4.1 Collects information regarding purchasing preferences, buying decision making processes, satisfaction level, and persistence to following sales techniques.

3.4.2 Provides a real-time picture of buyer's behavior from actual known customers that relates directly to sales performance across each month and season.

Secondary Data:

- Involves fashion sales reports, CRM details, historic customer feedback and market research reports.
  - Provides support and verification of the primary data results.

3.5 Research Technique

The following research methodologies are used to evaluate the data:

1. **Questionnaire Method:**

   Structured questionnaires that include open-ended and close-ended questions collect primary data. - The close-ended questions help to quantify the buyer preferences, and the open-ended questions provide qualitative material.

2. **Telephonic Interviews:**

   Engaging directly with customers, to understand what motivated their purchase, how they made their purchasing decision, and feedback about their experiences with our sales approach.

CHAPTER 4:
DATA ANALYSIS AND INTERPRETATION

INTRODUCTION

Data analysis is a crucial step in understanding customer behaviour, evaluating marketing strategies, and improving business performance. In the context of this study on *"*Sales and Marketing Strategies for Customer Acquisition at Clear Tax*"*, data analysis helps uncover patterns, preferences, and trends that influence how customers choose Clear Tax's services. By systematically examining the responses collected through surveys, the study aims to provide actionable insights that can guide sales teams in optimizing their approach to attract and retain customers.

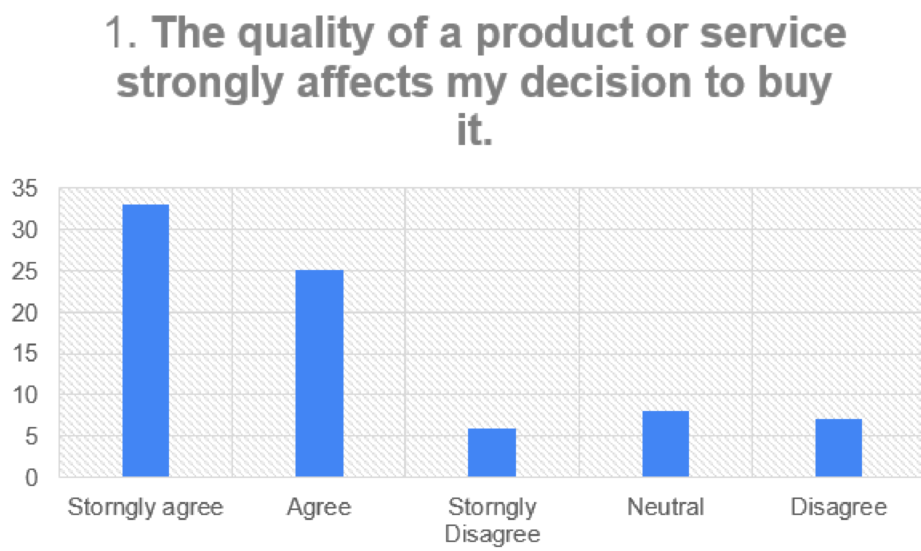
The main objective of data analysis in this study is to interpret the opinions, preferences, and behaviour of customers regarding sales interactions, communication, personalization, and trust-building. It enables the identification of key factors that drive customer decisions, such as the quality of service, responsiveness of sales representatives, personalized recommendations, and effective follow-ups. By analysing this data, the company can assess which strategies are most effective in creating a positive customer experience and fostering loyalty.

Furthermore, data analysis helps in quantifying customer perceptions. Responses from survey participants are categorized and examined to understand the proportion of customers who agree, disagree, or remain neutral about various sales and marketing practices. Visual representations such as graphs and charts are often used to simplify complex data, making it easier to identify trends and draw conclusions.

In essence, the data analysis section of this study serves as the foundation for making evidence-based recommendations.

4.1 Analysis of Survey Responses and Graphical Representation of responses

Q1. The quality of a product or service strongly affects my decision to buy it.



Interpretation:

The responses clearly highlight the importance of quality in consumer decision-making. A majority of respondents—**35 strongly agreed** and **25 agreed**—indicating that most people give top priority to product or service quality before making a purchase. Only a small portion of respondents expressed disagreement, with **9 disagreeing** and **6 strongly disagreeing**, while **8 remained neutral**.

This shows that while there are a few exceptions, overall, **quality is the most influential factor** shaping purchasing decisions.

Q2. The price of a product or service plays a big role in whether I choose to purchase it.

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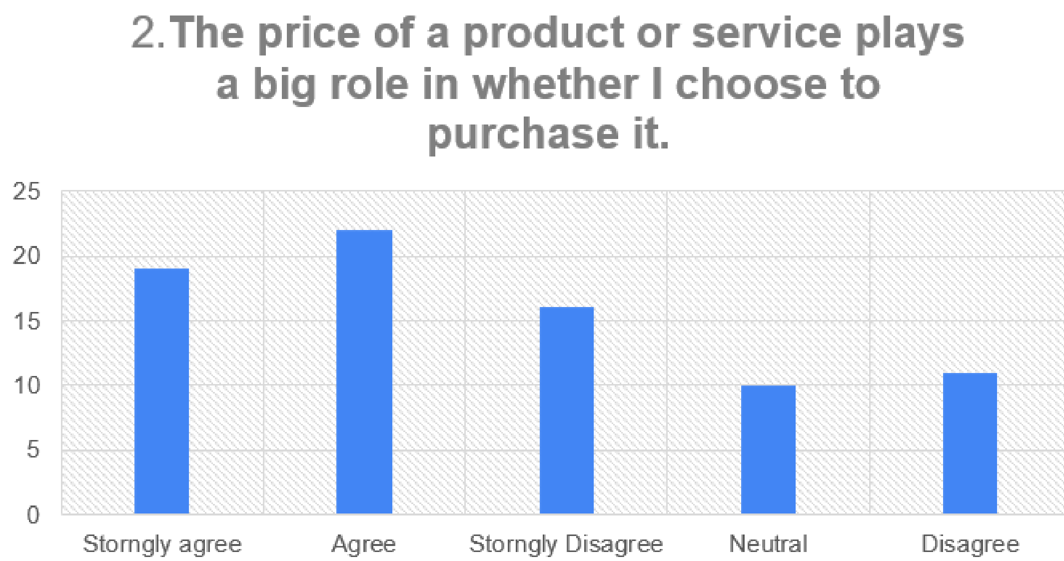
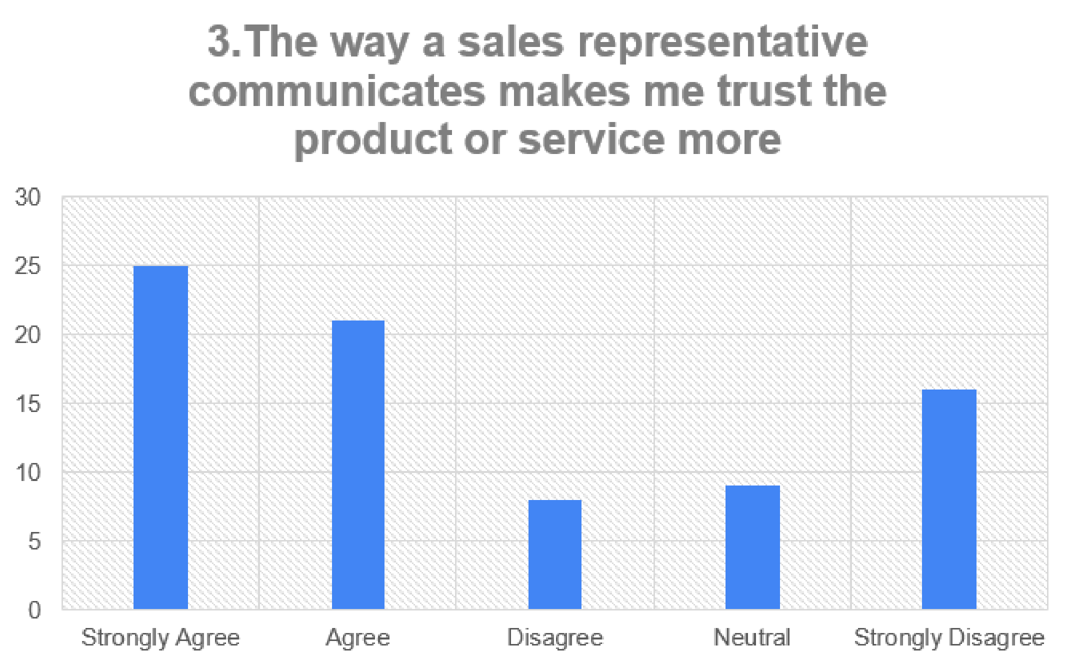


Interpretation:

I am more likely to stay loyal to a company when sales representatives respond to my needs and preferences", the responses reflect mixed opinions. A good number of respondents—**19 strongly agreed** and **24 agreed**—suggesting that many customers value personalized attention and responsiveness from sales representatives as a key factor in building loyalty. However, a significant portion—**16 strongly disagreed** and **11 disagreed**—indicated that not everyone sees this as a decisive factor for loyalty. Meanwhile, **9 respondents remained neutral**.

Overall, the findings suggest that while **responsiveness and personalization from sales representatives can positively influence customer loyalty**, companies should also recognize that other factors beyond sales interaction may play a role in retaining all customers.

Q3. The way a sales representative communicates makes me trust the product or service more.



Interpretation:

The results show that communication plays a vital role in building customer trust. A majority—**25 strongly agreed** and **20 agreed**—feel that clear and effective communication from sales representatives increases their confidence in the product or service. On the other hand, **16 strongly disagreed** and **6 disagreed**, showing that some customers are less influenced by sales interactions. Additionally, **8 respondents remained neutral**.

Overall, the findings suggest that **good communication from sales representatives is a powerful trust-building factor**, though a section of customers may rely on other elements, such as product quality or brand reputation, to form trust.

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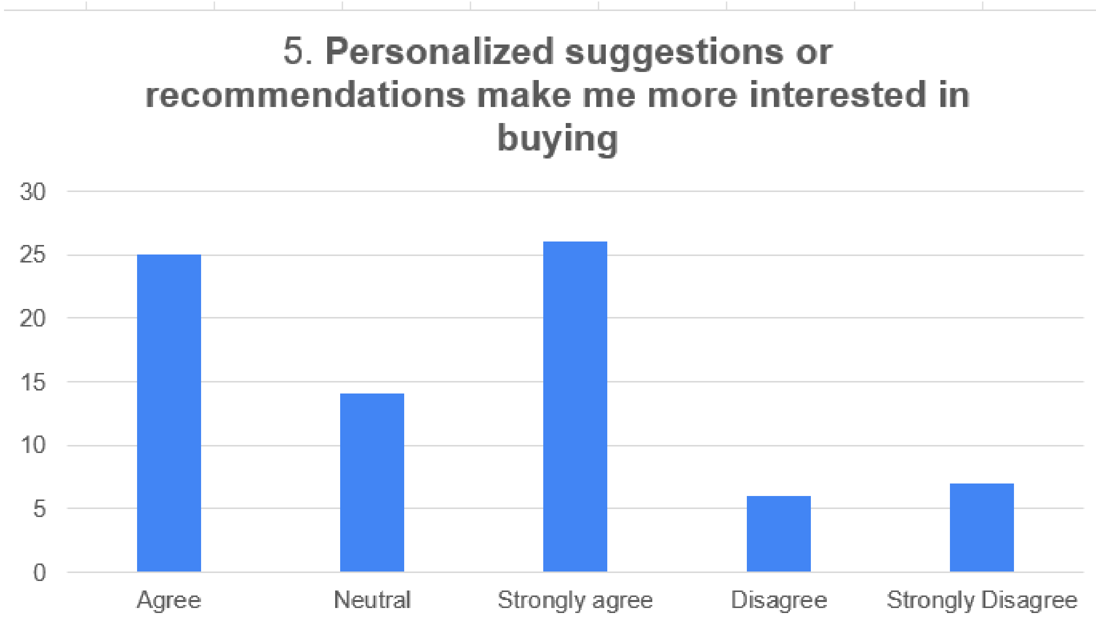
Q4. When a sales representative understands my needs, I feel more likely to buy from them.

Interpretation:

- When a sales representative understands my needs, I feel more likely to buy from them*"*, the responses show that understanding customer needs has a strong impact on purchase decisions. A majority—**21 strongly agreed** and **24 agreed**—indicated that they are more inclined to buy when sales representatives listen and respond to their requirements. Meanwhile, **10 strongly disagreed** and **8 disagreed**, showing that for some customers, buying decisions are not heavily influenced by sales representatives. **12 respondents stayed neutral**, suggesting they may consider other factors as equally important.
- Overall, the results highlight that **a personalized sales approach, where representatives genuinely understand customer needs, significantly increases the likelihood of purchase**, even though not all customers rely on this factor.

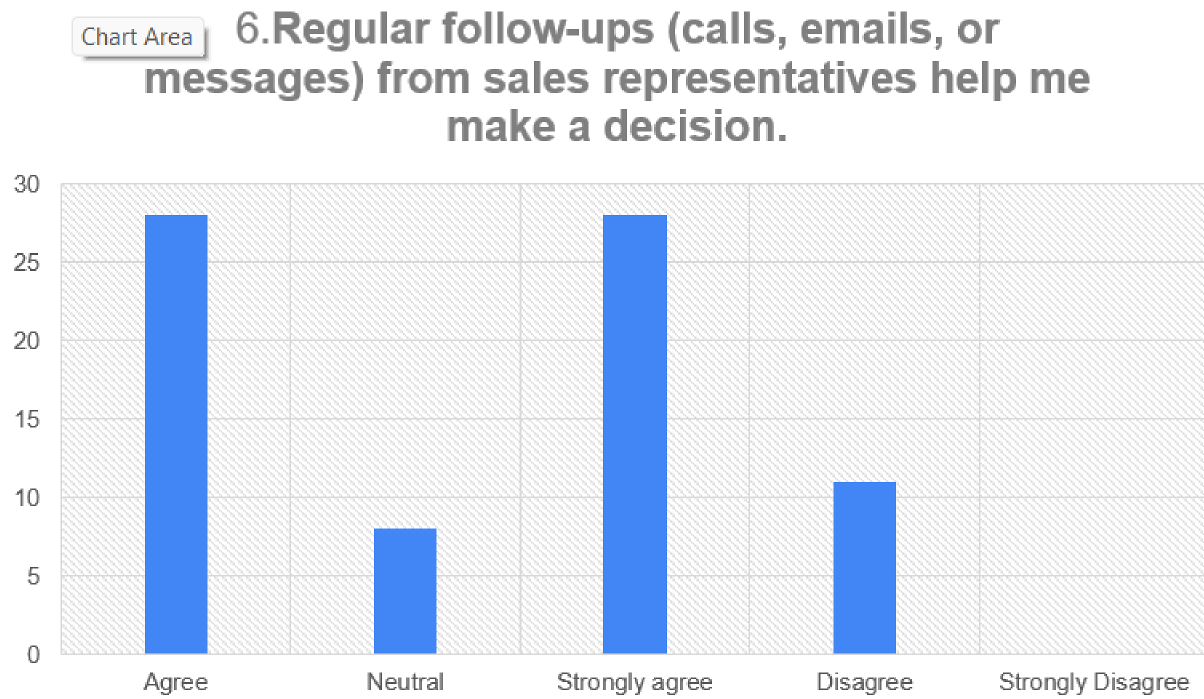
Q5. Personalized suggestions or recommendations make me more interested in buying.



Interpretation:

- The responses clearly indicate that personalization strongly influences customer interest. A majority—**27 strongly agreed** and **25 agreed**—believe that tailored suggestions make them more engaged and likely to consider purchasing. On the other hand, **9 strongly disagreed** and **6 disagreed**, showing that a small portion of customers are not swayed by personalized recommendations. Meanwhile, **12 respondents remained neutral**, suggesting that personalization alone may not be enough for everyone.
- Overall, the findings highlight that **personalized recommendations are a powerful strategy to spark customer interest and drive purchase decisions**, though companies should also balance personalization with other factors like price and quality.

Q6. Regular follow-ups (calls, emails, or messages) from sales representatives help me make a decision.



Interpretation:

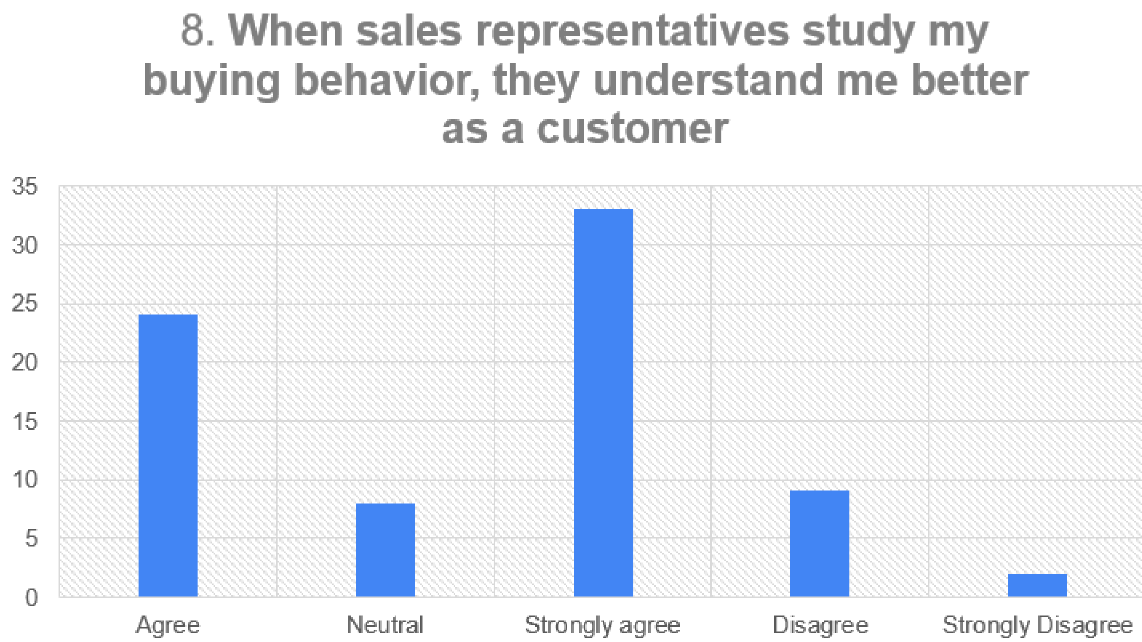
- The responses strongly highlight the importance of follow-ups in influencing customer decisions. A large majority—**29 strongly agreed** and **28 agreed**—indicated that consistent communication from sales representatives helps them finalize their purchase decisions. Only **11 respondents disagreed**, and interestingly, **no one strongly disagreed**, showing very little resistance to follow-ups. Meanwhile, **7 respondents remained neutral**, suggesting that follow-ups may not make a big difference for them.

Q7. Customer reviews, testimonials, or success stories shared by sales representatives influence my decision.

Interpretation:

- The responses show that social proof plays an important role in shaping buying decisions. A majority—**30 strongly agreed** and **25 agreed**—revealed that they trust and feel more confident when sales representatives share positive experiences of other customers. On the other hand, **6 disagreed** and **7 strongly disagreed**, suggesting that a smaller group does not consider testimonials a major factor in their decision-making. Meanwhile, **10 respondents remained neutral**, indicating mixed feelings.
- Overall, the findings suggest that **reviews and success stories act as powerful trust-building tools**, making customers more likely to purchase.

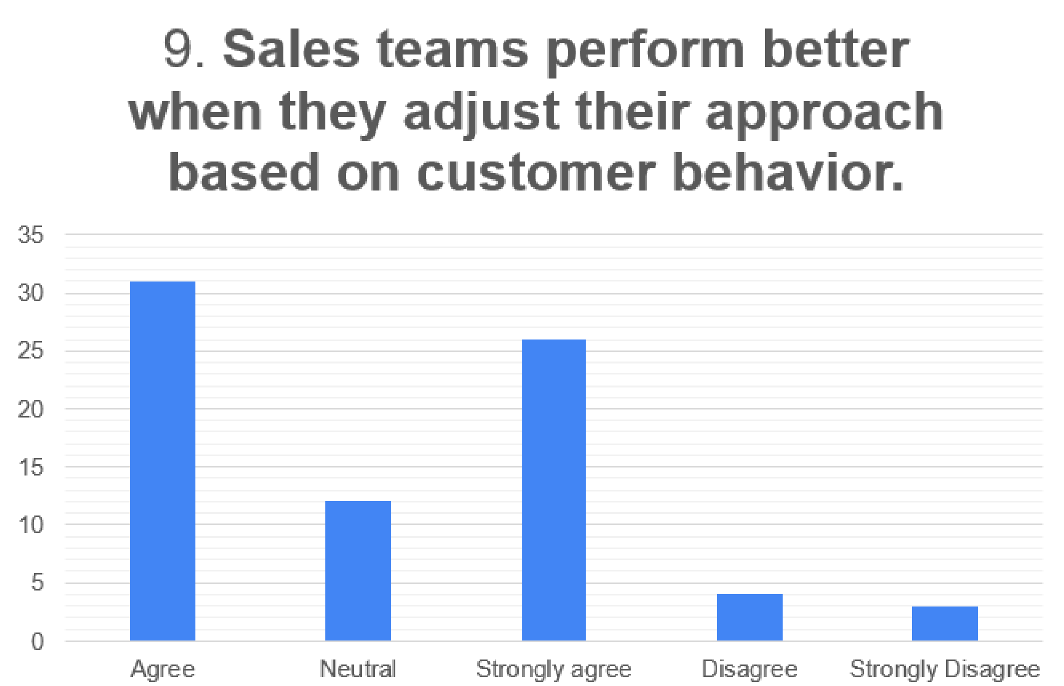
Q8. When sales representatives study my buying behavior, they understand me better as a customer.



Interpretation:

- The responses show a strong positive outlook. A large majority—**34 strongly agreed** and **24 agreed**—feel that analyzing customer buying behavior helps sales representatives connect with them better and offer more relevant solutions. Only a small portion—**9 disagreed** and **3 strongly disagreed**—do not feel this approach makes much difference. Meanwhile, **6 respondents remained neutral**, showing mixed opinions.
- Overall, the findings highlight that **most customers appreciate when sales representatives study their buying behavior**, as it makes them feel understood and valued, ultimately strengthening the relationship and trust with the company.

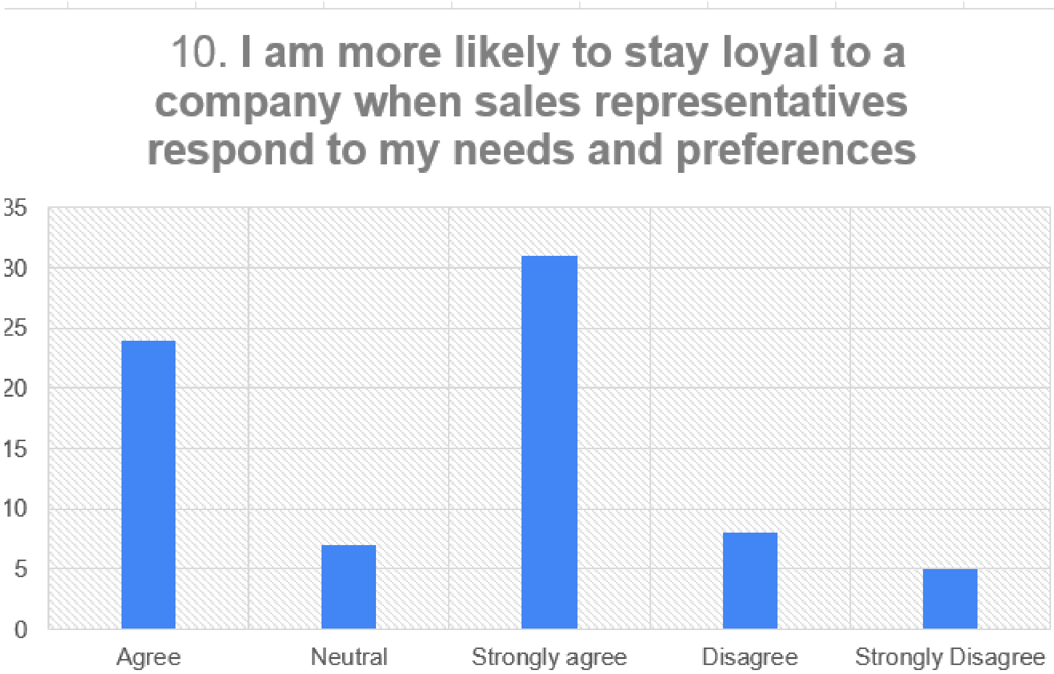
Q9. Sales teams perform better when they adjust their approach based on customer behavior



Interpretation:

- the responses strongly emphasize the importance of flexibility in sales strategies. A clear majority—**26 strongly agreed** and **31 agreed**—believe that adapting to customer behavior leads to better sales performance and stronger results. Only a very small group—**4 disagreed** and **2 strongly disagreed**—did not share this view, while **11 respondents remained neutral**, suggesting they may not see direct evidence of its impact.
- Overall, the findings highlight that **most customers recognize the value of sales teams adjusting their approach to individual behaviours**, reinforcing the idea that personalization and adaptability are key drivers of success in sales.

Q10. I am more likely to stay loyal to a company when sales representatives respond to my needs and preferences.



Interpretation:

- the results highlight the strong link between responsiveness and customer loyalty. A majority **32 strongly agreed** and **24 agreed**—indicated that when sales representatives listen and adapt to their needs, it builds trust and long-term commitment to the company. Only a small group—**6 disagreed** and **5 strongly disagreed**—felt otherwise, while **7 respondents remained neutral**, showing mixed opinions.

- Overall, the findings suggest that **personalized attention and responsiveness from sales representatives play a major role in fostering customer loyalty**, making it an essential strategy for businesses to retain their customers.

CHAPTER 5:

SUMMARY OF FINDINGS, RECOMMENDATIONS AND CONCLUSIONS

Summary and Findings.

The research titled "A Study on the Role of Buyer Behavior Analysis in Enhancing Inside Sales Performance" was conducted to investigate the role of buyer behaviour in shaping purchase decisions,

customer engagement, and loyalty with reference to inside sales. A structured questionnaire was administered, and feedback recorded across 10 main dimensions: product quality, price, communication, need recognition, personalization, follow-up, testimonials, buyer behaviour analysis, flexibility of approach, and customer loyalty.

The findings show support for the factors related to buyer behaviour significantly impact customer decision-making and sales.

The survey conducted provides valuable insights into how customers perceive the role of sales representatives, product quality, and personalized interactions in shaping their buying decisions and loyalty. The responses reveal a clear pattern—customers do not just purchase based on price or availability, but rather on a combination of quality, trust, personalization, and responsiveness**.** These findings emphasize that businesses looking to improve customer acquisition and retention must focus on building strong, customer-centric sales strategies.

One of the most important findings is that quality remains the top priority for customers. The majority of respondents strongly agreed that the quality of a product or service plays the most influential role in their decision-making process. This indicates that no matter how effective sales representatives may be, customers will rarely compromise on quality. Companies, therefore, must view quality not just as a baseline requirement but as a strategic advantage that drives loyalty and long-term relationships.

The study also highlights the importance of sales representatives in building trust**.** Many respondents agreed that the way a sales representative communicates significantly affects their level of trust in a product or service. This shows that communication is not just about providing information—it is about creating confidence, reducing doubts, and making customers feel comfortable with their choices. Sales representatives who can communicate clearly, transparently, and with empathy have a higher chance of winning customer trust.

Equally important is the understanding of customer needs. A majority of respondents agreed that when sales representatives understand and respond to their individual needs and preferences, it makes them more likely to buy and stay loyal to the company. This suggests that responsiveness and attentiveness are critical to loyalty-building. Customers are more inclined to remain committed to companies that treat them as individuals rather than just transactions.

Another strong theme across the responses is the role of personalization. Personalized suggestions, recommendations, and even testimonials shared by sales representatives were seen as effective tools to influence purchase decisions. Customers feel more connected to a company when sales representatives tailor their approach to their specific buying behavior and preferences. In particular, many respondents agreed that studying buying behavior allows sales representatives to better understand and serve them, which enhances the overall customer experience.

The findings also highlight the significance of consistent follow-ups. Regular communication—through calls, emails, or messages—was widely appreciated by respondents, as it helped them make better and more confident purchase decisions. This suggests that follow-ups should not be seen as pushy or aggressive but rather as a supportive mechanism that guides customers through the decision-making journey.

Additionally, adaptability emerged as another key factor. Respondents strongly agreed that sales teams perform better when they adjust their approach based on customer behavior. This reinforces the idea that a “one-size-fits-all” sales strategy is no longer effective. Modern customers expect sales approaches to evolve based on their preferences, buying patterns, and interactions. Sales teams that remain flexible and customer-oriented are more likely to succeed in a competitive environment.

At the same time, the survey revealed that a smaller group of customers either disagreed or stayed neutral across different questions. This suggests that while personalization, communication, and responsiveness are highly valued by most, some customers still base their decisions on other factors such as price, convenience, or brand reputation. For businesses, this means striking a balance between personalized service and competitive offerings to cater to diverse customer needs.

The findings from this survey clearly show that customer behavior is shaped by a mix of quality assurance, personalized engagement, effective communication, and adaptive sales strategies.

Businesses that empower their sales teams to listen actively, personalize their approach, and maintain consistent follow-ups are more likely to build trust, foster loyalty, and influence purchase decisions.

In essence, customers today are not just buying products or services—they are buying experiences, trust, and relationships. Companies that understand this shift and focus on customer-centric sales strategies will not only perform better in the short term but also build sustainable growth and long-term loyalty.

Conclusion:

The research "A Study on the Role of Buyer Behaviour Analysis in Improving Inside Sales Performance" is important because buyer behaviour shapes purchaser decisions, customer interactions and loyalty. The survey results identify buyer behaviour factors that influence purchasing behaviour include product quality, pricing, communication style, needs recognition, personalized customer interactions, follow up, building trust with testimonials and cases of customer success.

The findings also highlight how buyer behaviour analysis gives sales representatives insight into customer behaviour to better understand customers, tailor sales methods, and improve sales performance. In addition, buyer behaviour can increase long-term loyalty as customers could return with the personalised behaviour-based sales techniques.

The study also indicates that:

1. Trust-building tactics (like reviews and testimonials) add to credibility and work as a significant support to a sales process.
2. Sales using adaptive strategies based on behaviours result in conversion improvements, but most importantly, they also help develop meaningful customer relationships.
3. Sales using data-based strategies will give the sales team a competitive advantage aligning for success with buyers' expectations.

In summary, the research titled "A Study on the Role of Buyer Behaviour Analysis in Improving Inside Sales Performance" showed that using a customer- centric behaviour-based sales methodology can improve sales conversion rates and build relationships for long term customer loyalty which is essential for developing sustainable inside sales growth.

Direction for Future Research:

While the findings from this study offer valuable considerations regarding buyer behaviour's influence on inside sales, there are many additional areas of exploration for future researchers:

1. Cross-Industry Differences – This study explored general buyer behaviour in inside sales. Future research could explore cross-industry differences on buyer behaviour in sectors like pharmaceuticals, technology, e-commerce, and financial services to better understand specific behavioural drivers in each sector.
2. Cultural and Regional Influences – Often there are different patterns of buying behaviour across geographies due to cultural preferences, communication styles, and trust mechanisms. A comparison of buying behaviour across regions or countries would give sales teams greater insight to understand how best to design strategies specific to a region.
3. Longitudinal Studies on Loyalty – Since customer loyalty emerged as an important finding, future studies could take a longitudinal approach to see how behaviour-driven sales efforts affect long term loyalty and the purchasing behaviour of the same person over time.
4. Digital Sales Channels – With the increasing presence of AI, chatbots, and digital-first interactions, future studies could look at buying behaviour in online or hybrid sales environments compared to traditional inside sales models.
5. Psychological and Emotional Drivers - In addition to product quality and price expectations, emotional factors such as trust, urgency, or aversion to risk can create psychological conditions

6. for decision making. Future research might use psychological frameworks or behavioural economics to better understand what might motivate someone to buy.
7. Role of Technology and Data Analytics - The impact of the behaviour of buyers is increasingly being analysed through Customer Relationship Management (CRM) tools, AI based predictive analytics, and with big data. Future research, however, can investigate how these technologies can enhance personalization and sales results.

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ANNEXURE

1. **The quality of a product or service strongly affects my decision to buy it.**
    - **Strongly Disagree**
    - **Disagree**
    - **Neutral**
    - **Agree**
    - **Strongly Agree**

2. **The price of a product or service plays a big role in whether I choose to purchase it.**
    - **Strongly Disagree**
    - **Disagree**
    - **Neutral**
    - **Agree**
    - **Strongly Agree**

3. **The way a sales representative communicates makes me trust the product or service more.**
    - **Strongly Disagree**
    - **Disagree**
    - **Neutral**
    - **Agree**
    - **Strongly Agree**

4. **When a sales representative understands my needs, I feel more likely to buy from them.**
    - **Strongly Disagree**
    - **Disagree**
    - **Neutral**
    - **Agree**
    - **Strongly Agree**

5. **Personalized suggestions or recommendations make me more interested in buying.**
    - **Strongly Disagree**
    - **Disagree**
    - **Neutral**
    - **Agree**
    - **Strongly Agree**

6. **Regular follow-ups (calls, emails, or messages) from sales representatives help me make a decision.**
    - **Strongly Disagree**
    - **Disagree**
    - **Neutral**

- **Agree**
- **Strongly Agree**

7. Customer reviews, testimonials, or success stories shared by sales representatives influence my decision.

- **Strongly Disagree**
- **Disagree**
- **Neutral**
- **Agree**
- **Strongly Agree**

8. When sales representatives study my buying behavior, they understand me better as a customer.

- **Strongly Disagree**
- **Disagree**
- **Neutral**
- **Agree**
- **Strongly Agree**

9. Sales teams perform better when they adjust their approach based on customer behavior.

- **Strongly Disagree**
- **Disagree**
- **Neutral**
- **Agree**
- **Strongly Agree**

10. I am more likely to stay loyal to a company when sales representatives respond to my needs and preferences.

- **Strongly Disagree**
- **Disagree**
- **Neutral**
- **Agree**
- **Strongly Agree**

Weekly Progress Report

Name of the Student: Chaitali Biswas

Programme PGDM Reg No: PGDM24017 Section: A

Title of the Project: Sales and Marketing Strategies for Customer Acquisition at ClearTax

Company: Clear Tax

Internship supervisor (Institution): ~~Dr. Suresh Mani~~ Dr. Jyoti Mishra

External Supervisor (Company): Syed Imran

Phone: 8116712310

Progress Report No - 01

Period		Major Duties Performed	Learning Outcome	Student Signature
From	To			
5th May	11th May	• Attended onboarding orientation on company rules, culture, and expectations. • Got introduced to LeadSquare and Ozonetel calling tool. • Understood the filing categories: ITR-1, ITR-2, ITR-3, ITR-4.	• Familiarized myself with workplace culture and expectations. • Gained a basic idea of tax filing categories. • Learned the importance of LeadSquare in managing sales leads.	

Signature of Supervisor
(External / Company)

Signature of JM
(Institution)

Progress Report No - 02

Period		Major Duties Performed	Learning Outcome	Student Signature
From	To			
12th May	18th May	• Participated in training sessions on ClearTax Assisted Filing Plans. • Learned about plan features – Basic, Premium, Elite, and Luxury. • Observed live client calls to see how objections were handled.	• Understood different tax plans and how to match them to customer needs. • Learned customer handling strategies by listening to senior team members. • Improved knowledge of service features.	

Signature of Supervisor
(External Company)

Signature of (Institution)

Progress Report No - 03

Period		Major Duties Performed	Learning Outcome	Student Signature
From	To			
19th May	25th May	• Practiced sales pitch structuring and objection-handling scripts. • Answered queries from customers about filing window status. • Updated lead details on LeadSquared after mock calls.	• Gained confidence in communicating with clients. • Learned how to respond to initial rejections politely. • Developed skills in lead tracking and updating entries.	

Signature of Supervisor
(External Company)

Signature of (Institution)

Progress Report No - 04

Period		Major Duties Performed	Learning Outcome	Student Signature
From	To			
26th May	31st May	• Attended soft skill sessions focused on call etiquette and follow-up importance. • Learned alongside senior executives during live sales calls. • Responded to queries on assisted filing timelines.	• Learned the value of structured communication during sales calls. • Understood how timely follow-ups impact conversion rates. • Gained exposure to handling real client objections.	

Signature of Supervisor

(External / Company)

Signature of JM

(Institution)

Progress Report No - 05

Period		Major Duties Performed	Learning Outcome	Student Signature
From	To			
2nd June	8th June	• **Started outbound calling using Ozonetel for ITR services.** • Introduced clients to multiple plans available on ClearTax. • Highlighted the advantages of filing early.	• Developed confidence in initiating conversations with customers. • Learned to explain complex features in simple terms. • Understood customer hesitation during initial calls.	

Signature of Supervisor

(External / Company)

Signature of JM

(Institution)

Progress Report No - 06

Period		Major Duties Performed	Learning Outcome	Student Signature
From	To			
9th June	15th June	• Promoted Pre-Booking Offer with discounts up to 60%. • Guided customers on uploading documents later after booking. • Handled objections from customers unwilling to buy early.	• Learned how discount schemes influence buying decisions. • Strengthened skills in objection handling. • Improved ability to explain promotional offers clearly.	

Signature of Supervisor
(External/ Company)

Signature of ZM
(Institution)

Progress Report No - 07

Period		Major Duties Performed	Learning Outcome	Student Signature
From	To			
16th June	22nd June	• Simplified pitch to focus on 4 main plans instead of 11. • Educated customers about discount codes and coupon availability.	• Understood the benefit of simplifying product offerings for customers. • Learned how to encourage purchase using coupon codes. • Improved efficiency in monitoring personal sales performance.	

Signature of Supervisor
(External / Company)

Signature of ZM
(Institution)

Progress Report No - 08

Period		Major Duties Performed	Learning Outcome	Student Signature
From	To			
23rd June	30th June	• Observed the impact of extended deadline till 15th September on customer interest. • Reworked sales strategies due to customer delay mindset.	• Learned to adapt strategies based on external factors like deadlines. • Understood how teamwork drives performance. • Gained motivation through performance-linked incentives.	

Signature of Supervisor
(External/ Company)

Signature of JM
(Institution)

Progress Report No - 09

Period		Major Duties Performed	Learning Outcome	Student Signature
From	To			
1st July	7th July	• Continued outbound calling during peak filing season. • Handled objections from customers dissatisfied with past filing. • Attempted service recovery by reassuring clients of improved service.	• Learned to handle tough customers with patience. • Improved trust-building and reassurance skills. • Understood the role of customer experience in sales success.	

Signature of Supervisor
(External/ Company)

Signature of JM
(Institution)

Progress Report No - 10

Period		Major Duties Performed	Learning Outcome	Student Signature
From	To			
8th July	14th July	• Managed customer calls after ITR-2 and ITR-3 went live (11th July). • Observed an increase in conversions due to wider availability. • Followed strict call routing guidelines via Ozonetel.	• Gained practical experience in working during peak demand. • Understood the impact of ITR form availability on customer decisions. • Learned the importance of compliance with call audit protocols.	

Signature of Supervisor
(External / Company)

Signature of JM
(Institution)

Progress Report No - 11

Period		Major Duties Performed	Learning Outcome	Student Signature
From	To			
15th July	21st July	• Dealt with challenges as plan prices increased. • Faced resistance from customers unwilling to purchase at higher rates. • Updated leads in Smart View and maintained pipeline compliance.	• Learned to sell by focusing on value when price becomes an objection. • Gained insight into customer price sensitivity. • Strengthened skills in lead management and compliance.	

Signature of Supervisor
(External / Company)

Signature of JM
(Institution)

Progress Report No - 12

Period		Major Duties Performed	Learning Outcome	Student Signature
From	To			
22nd July	31st July	• Handled high-pressure calls with daily performance monitoring. • Balanced customer service with sales targets. • Completed internship tasks with regular audits and reporting.	• Built resilience in high-pressure situations. • Learned how incentives and monitoring shape performance. • Developed adaptability to changing work expectations.	

Signature of Supervisor
(External Company)

Signature of
(Institution)

JM

Post Graduation Diploma In Management

(AICTE Approved, ministry of Education, Government of India, new Delhi)

WEEKLY LOG BOOK

Date of Meeting	Term III/IV	Suggestion Offered	Signature		Remarks
			Guide	Student	
1. 10/05/25		Issues Discussed: • Initial discussion focused on framing the problem statement and identifying the research gap in the organization.			
		Suggestion: • The guide recommended clarifying the problem and highlighting the gap more precisely.			
2. 17/05/25		Issues Discussed: • Discussed about the selected topic and the way forward for the study.			
		Suggestion: • The guide advised modifying the title of the study and suggested drafting clear objectives.			
3. 24/05/25		Issues Discussed: • Discussion revolved around preparing the questionnaire, the type of questions, and its structure.			
		Suggestion: • Advised to design the questionnaire in Google Forms and make changes to the study's limitations.			
4. 31/05/25		Issues Discussed: • Shared the summary of Chapter 1 with the guide.			
		Suggestion • Asked to refine the statement of the problem and improve the literature review section.			

Post Graduation Diploma In Management

(AICTE Approved, ministry of Education, Government of India, new Delhi)

WEEKLY LOG BOOK

Date of Meeting	Term III/IV	Suggestion Offered	Signature		Remarks
			Guide	Student	
5. 07/06/25		Issues Discussed: • Review of Chapter 2 and its components.			
		Suggestion: • Suggested to study and analyze company competitors for better insights.			
6. 14/06/25		Issues Discussed: • Talked about improving the report presentation.			
		Suggestion: • Recommended inserting charts and diagrams to support the analysis.			
7. 21/06/25		Issues Discussed: • Examined Chapter 3 with emphasis on sample size and methodology.			
		Suggestion: • The research methodology needed revisions as the content lacked clarity.			
8. 28/06/25		Issues Discussed: • Questionnaire preparation was discussed again.			
		Suggestion • Suggested dividing the questionnaire into sections aligned with objectives.			

Post Graduation Diploma In Management

(AICTE Approved, ministry of Education, Government of India, new Delhi)

WEEKLY LOG BOOK

Date of Meeting	Term III/IV	Suggestion Offered	Signature		Remarks
			Guide	Student	
9. 05/07/25		Issues Discussed: • Format of Chapter 4 was discussed in detail.			
		Suggestion: • Guided on the dos and don’ts for presenting Chapter 4.			
10. 12/07/25		Issues Discussed: • Focused on including tables and visual data.			
		Suggestion: • Recommended adding interpretations and inferences along with charts.			
11. 19/07/25		Issues Discussed: • Talked about Chapter 5, especially findings and references.			
		Suggestion: • Asked to prepare findings and practical suggestions from the questionnaire.			
12. 26/07/25		Issues Discussed: • Final discussion on overall report structure and presentation.			
		Suggestion • Suggested correcting alignment and refining future scope of study.			

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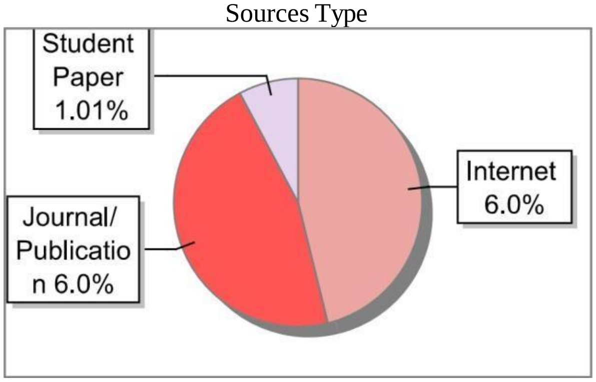

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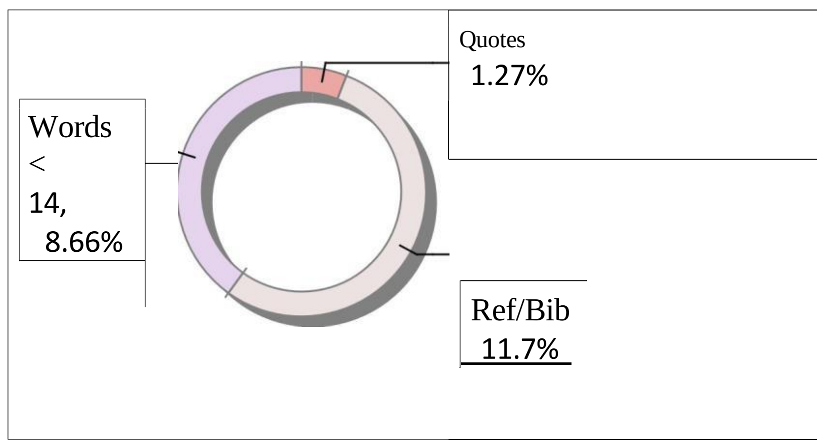

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