



# Callbox Revs Up Tax Consulting Firm's Sales Efforts

## THE CLIENT

The Client is an independent property tax consulting firm specializing exclusively in providing taxpayers of commercial, industrial, multi-residential, and special purpose properties with full-range property assessment and tax management services.

They have a national reach with 19 offices that handle large sales territories across the United States including New York, California, Illinois, Pennsylvania, Massachusetts and Texas.

## THE CHALLENGE

The Client needed a way to help all their Managing Consultants who head each regional office across the country in bulking up their sales pipeline.

## THE SOLUTION

The Client approached Callbox to conduct an aggressive telemarketing campaign that would fill their calendars with qualified appointments on a daily basis. Starting with a test campaign for one location in November of 2005, Callbox now conducts the appointment setting campaign for 14 of the Client's 19 locations including its head office in Arizona.

To meet the Client's requirements, Callbox decided to assign a personal appointment setter to the Main Specialist for each location. Appointments are set based on a detailed script and strict qualifying criteria provided by the Client including:

- Introduction of the Client to the decision maker
- Explanation of the coverage of the appointment being set on behalf of the consultant or specialist
- Initial qualification of the prospect based on the amount currently paid in personal taxes
- Delivery of proper rebuttals when necessary

Callbox appointment setters then e-mail the prospect companies copies of the Client's marketing collateral and Statement of Qualifications.

Appointments are then delivered via PipelineCRM, an online CRM tool developed by Callbox especially for clients with distributed offices and disparate territories. This enables consultants and specialists to access their up-to-date sales pipeline anytime, anywhere, maximizing their time to develop new business. Sales people can follow-up the appointments even when the Specialists are not available, making sure no leads fall through the cracks.

## THE RESULTS

Callbox experienced appointment setters coupled with the Callbox online appointment setting tool allowed the Client to concentrate on their core business- delivering exceptional property tax consulting services rather than cold-calling and managing each sales person.

The Client now enjoys:

- Over 100 highly qualified appointments every month
- Higher conversion rate as a result of improved lead quality
- Coherent single-source feedback on the current pulse of the market in various territories.

