

Speeding Up Lead Flow for Leading Payment Processor

THE CLIENT

The Client comprises of regional directors and division managers of one of the leading independent payment processors in the United States, handling credit and debit card transactions as well as payroll services for over 100,000 restaurants, hotels and other retail merchants. They employ over 400 staff, and over 800 sales representatives. Their company, headquartered in the east coast, has numerous regional offices that handle large sales territories such as Ohio, California, Texas, Arizona and Indiana.

THE CHALLENGE

The Client needed a reliable marketing strategy to keep its services clearly faster and more accessible than that of the increasing number of competitors in the highly-competitive mercantile arena. Specifically, the Client aimed to help their operational level Relationship Managers manage their sales pipeline to encourage increased business development.

The Client chose to:

- grow their vested organization substantially with heavy emphasis on quality people and low sales professional turnover
- leverage their 800 strong nationwide sales force coverage

THE SOLUTION

The Client realized they could meet both these objectives with the Callbox Appointment and Lead Generation program. Callbox assigned a personal Inside Sales Agent to each Salesperson in the campaign, and provided each Salesperson his or her own online appointment book. This sales force then had their schedules saturated with pre-qualified appointments. Without the need to cold call, the sales force was free to concentrate on closing. The result was a substantial increase in sales leads without increasing the sales force.

The experienced sales force was delighted to have fresh leads delivered throughout each day, enjoyed more commission, and were thrilled to be free of cold calling. This resulted in markedly lower sales force turnover for The Client.

The Callbox Inside Sales Agents took on these responsibilities:

- raise contacts on the phone
- educate contacts about the products and services
- gauge interest in the services by asking qualifying questions, making notes on all targets, instantly viewable by the assigned Salesperson and the regional supervisor.
- set appointments for the sales force
- provide real-time reporting via the Callbox PipelineCRM

THE RESULT

As a result of working with experienced Callbox Inside Sales Agents, and the Callbox online real-time appointment calendaring to schedule individually all the agents in the campaign, the Client was free from micro-managing the sales force and could concentrate on the larger implications of the numbers coming in.

The Client now enjoys:

- substantial volume increase in sales activity and closings for sales agents under the program
- improved lead quality dictated by strict Callbox qualification standards
- significant reduction in costs associated with generating new business
- additional coherent feedback from one source about the current pulse of the market in various territories

As a pleasant side-effect of allowing Callbox to take care of the entire lead generation part of the business, as well as the management of the sales force, the Client has become capable of delivering tailored solutions to additional demanding markets such as retail and community banks, making it one of the largest payment processors to date with \$32.9 billion in annual processing volume from current merchants.

