



Speeding Up Lead Flow for Leading Payment Processor

THE CLIENT



INDUSTRY
Merchant



LOCATION
US



HEADQUARTERS
Oklahoma, US

ABOUT

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, Indiana.



CAMPAIGN TYPE
Appointment Setting



TARGET LOCATION
US



TARGET DECISION MAKERS
Business Owners

TARGET INDUSTRIES

Lodging & Hospitality, Restaurant, Education, Petroleum/C-Store

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 wanted to:

1. Grow their vested organization substantially with heavy emphasis on quality people and low sales professional turnover
2. Leverage their 800 strong nationwide sales force coverage

HIGHLIGHTS

- 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

RESULTS TO DATE



110% Increase in response rates



1000+ Leads and Appointments

CALL

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THE CALLBOX SOLUTION

The Client realized they could meet both 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 their 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 were tasked to carry out the following:

1. Raise contacts on the phone
2. Educate contacts about the products and services
3. Gauge interest in the services by asking qualifying questions, making notes on all targets, instantly viewable by the assigned Salesperson and the regional supervisor
4. Set appointments for the sales force
5. Provide real-time reporting via the Callbox PipelineCRM

RESULTS

As a result of using Callbox experienced 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.

To date, the ongoing campaign has resulted in the following:

- A **3-fold increase** in sales team activity in terms of number of proposals made and sales meetings completed
- Improved lead quality as evidenced by a **70% reduction** in no-show sales appointments and a **110% increase in response rates**
- **Additional prospect-level sales intelligence** for all its 800 reps nationwide

More importantly, by farming out the bulk of its prospecting activities, the Client was able to deploy additional sales resources to support its expansion efforts into more competitive but potentially more lucrative markets such as retail and community banks, making it one of the largest payment processors in a segment with annual merchant transaction processing volume of **\$32.9 billion**.

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