



Business Process Services

Sales Management and Lead Generation

Background

A large Solar Energy provider based out of Victoria, Australia wanted a system to track and record the leads that were generated and followed by the Sales Team. It commenced operations in the year 2014 and is one of the fastest growing Solar Energy providers in Western part of Australia.

The project started with the Development of a Lead Management System that later transformed into a full-fledged Sales CRM with Account Management and Customer Service feature. The system is available across Mobile Devices.

The Client wanted to develop an efficient and scalable Business Process Management System so that it enables collaboration within the Marketing Teams. The Tele-Calling Team would set up Leads and Appointments for the Field Representatives. The Leads would be fed into the System from where each stakeholder would be able to do tasks the role demands.

It set up an offshore team for Lead Generation and setting of Appointments for the Field Sales. The offshore telemarketing team calls upon the prospects and based on the feedback, the information is fed into the CRM. Based on their role, users can see and update his set of information. The purpose was to maintain transparency and accountability across the Channel.

With 6 Vendors, 30 Field Sales Reps, 70+ Tele Callers, the system carried a robust Life Cycle that started as a Database System for managing leads, has transformed into a Complete CRM for the Solar Industry.

Summary

The Company wanted a credible partner for providing B2B and B2C high quality leads for its Field Sales Force. The Company was already working with a large call centre in Melbourne. However, seeing high productivity, low attrition and ethical practices, the Company made us its number 1 Call Centre Partner.

The process of Lead Generation witnessed the execution of company's Go to Market seamlessly and most effectively. The support from the Outsourced team at PTR was visible in the first month when more than 80% of the sales closure were from the leads and appointments generated out of here.

We developed the required Infrastructure in just 1 month including Dialler, Leased Line, Human Resource, Training etc. We were able to start the Pilot run in the stipulated timeframe and the Company could see ROI almost instantly.

In the next 3 months, the company was able to scale down its inside sales team whereby reducing costs and improving margins and profits.



The Solution:

1. Market Research and List Building:

- a. Pipeline creation for Tele Sales agents*
- b. Create Bespoke Campaign specific contact list*
- c. Data Cleansing, Enrichment and CRM Data maintenance*

2. Inside Sales and Lead Generation:

- a. Tele sales and Tele marketing*
- b. Qualify prospects and provide confirmed telephone or in-person meetings*

3. Back Office and Quality:

- a. Verification and Confirmation of meetings*
- b. Feed data into the system for seamless follow up*

4. Contact Centre Services:

- a. Responding to inbound calls for RFI and RFQ through phone, email and chat*
- b. Customer Support and Account Management*

Following tasks were performed to execute the complete Outsourced Marketing Function:

- Marketing Objectives
- Deliverables and Activities
- Campaigns and Scripts
- Product Training to Tele Agents
- Training the users on CRM
- Matrix and Target
- Execution of Calls: Verification and Quality
- Capture Prospect Details
- Measure Campaign Response and Perform Analysis

The Pilot batch of 7 Tele-Agents were able to generate about 150 warm leads in less than 2 weeks.

It is like setting up your own Inside Sales Team. The difference being, it operates from Offshore.

The process description is explained to you with the help of the following Flow Chart:

1. Call Makes a Call: No Response, Answer Machine, Not Interested: Update CRM
2. If Voice Contact then Educate on Plan and Benefits
3. Get Appointment or Call Back
4. Update CRM for Auto-Routing and Auto Follow up.
5. Once updated, the CRM routes the appointment or Call back to the Sales Rep who is governing the territory.