

A Growing Company In Need of a Partner Up to the Challenge

As one of the fastest growing companies within Missouri, one company is making waves. Driven by a belief that sales is a craft mastered over a lifetime of experience and supported by its innovative technology and methods, it shows no signs of stopping and needed the right solution to complement its way of doing business.

Customer Profile

An inside sales and marketing company with product offerings in the areas of Health and Life.

Industry

Financial Services - Insurance

Challenges

- Heavily customized Salesforce CRM system
- Needed a better lead routing solution than current provider
- Ability to prioritize campaigns when running them simultaneously
- Inbound and Outbound capabilities with the ability for reps to view incoming calls on hold while handling outbound campaigns

Solutions

- Customized Salesforce integration to match the business's current setup as well as ongoing support to meet changing needs
- Advanced lead routing
- Campaign prioritization regardless of how many are running simultaneously
- Blended inbound/outbound contact center solution

Company Background

A Missouri-based inside sales and marketing company with product offerings in the areas of Health and Life Insurance has been making waves in recent years and was in search of a contact center solution capable of meeting its needs. Operating under its various subsidiaries, its origins can be traced back to humble beginnings in 2009 when a handful of Fortune 100 expats came together wanting to build something new. Fast-forward to the present day and it has grown exponentially, led by a veteran management team. With 2012 and 2013 sales increasing well over 200%, the organization prides itself on driving high quality leads to its sales team while using the latest technologies to help facilitate "the close."

The Challenge

With growth and success quickly demanding an operation that was both scalable and sustainable, the company made early investments in customizing their Salesforce platform to be uniquely suited to their business model. Applying a complex lead-allocation method across multiple campaigns, they sought to increase a sales rep's opportunities and overall conversion ratio only to discover their cloud contact center solution was not up to the task. "We realized fairly quickly that they [previous contact center solutions provider] were not the long-term solution to our needs," states the VP of Operations. And yet, with communications key to any successful sales attempt, the company knew any new solution would need to complement its Salesforce setup and overall way of doing business. "We had a problem on our hands for sure, and very little time to fix it."

The Contact Center Checklist

As they began to research possible alternatives to their current provider, it became readily apparent the chosen vendor would need to be willing to take on the challenge of molding to their current way of doing business. "We knew our needs would not fit within a pre-packaged solution and by default would test the limits of any provider," states the company's COO.

So what was on the checklist?

Integration with their Salesforce configuration was key but the company also needed a solution capable of improving its lead routing process. "We live by our leads and literally lose money and our competitive advantage if they are mismanaged in any way," explains the VP of Operations. In addition, their previous provider lacked the ability to prioritize campaigns when running them simultaneously, a significant problem considering the company's business model was contingent on reaching leads within seconds and not prolonged minutes. Compounding the issue, the organization had very little faith in their current vendors ability to deliver a workable solution within the next software release. "After a year of service, we were given very little reason to believe they were capable of providing the tools we needed, despite the promise of future upgrades and rollouts," continues the VP of Operations. Among the final requirements, a truly blended solution capable of allowing reps to view incoming calls on hold while addressing outbound calls.



"It feels like a long-term relationship. I'm not even sure our previous provider knew what our business was after a year together. We view this relationship as a partnership rather than a vendor-based arrangement."

-VP of Operations

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The Right Kind of Partnership

At the onset, 3CLogic was quick to implement a cloud contact center solution fitting the unique needs of the client but never at the expense of taking the time to do it right. "Unlike our previous provider, we were not held to a strict 30-day implementation period before being subjected to additional fees", explains the VP of Operations. "With 3CLogic we are planning for the future and searching for the best way to make our business efficient, so it was nice not to be held hostage to another company's limitations and policies".

So what changed and why did it matter?

Among a host of important items, 3CLogic's support and development teams were quick to configure a solution that seamlessly cycles leads based on their unique lead-allocation model. In addition, agents were given the ability to view incoming calls while handling outbound campaigns to swiftly be aware of and respond to higher priority opportunities. The company also benefited from 3CLogic's WAV-format recordings, an industry first and the result of direct collaboration between both companies. "We never even dreamed of doing or requesting certain features with our previous provider because we knew we could only use what they had in the box," explains the VP of Operations. "But with 3CLogic, if it doesn't exist, it's only a matter of time that it doesn't exist *right now*".

With the sudden ability to prioritize simultaneous campaigns, the benefits of improved lead routing, a customized Salesforce integration, and the comfort of knowing 3CLogic's team was always on standby the results were quick and obvious. "We've enjoyed great contact rates, our agents are more productive, and it's been thanks to our relationship with 3CLogic that it's all been possible. They care about our needs and it shows. In fact, I'm not even sure our previous provider even knew what our business was after a year together, but 3CLogic took the time to and does", states the VP of Operations. "It makes all the difference between a partnership and a simple vendor agreement."

The Results

- Median Lead Speed-to-Response (STR) lowered to 51 seconds from 7 minutes.
- Contact rate increase of 73%
- Agent production increased by 37.5%

The Future Looks Bright

"We are growing quickly and 3CLogic plays a daily role in that", explains the VP of Operations. "Even better, we have the ability to rely on 3CLogic's contact center expertise and leverage the advice and support of industry veterans like Robert Killory, Chief Customer Officer at 3CLogic," he continues.

With plans to double the size of the company within the coming years, this case study is but another example of how 3CLogic can improve your business while being there every step of the way.