



Web-to-Telephone Lead Generation and Web-Based Proactive “Chat” Case Study

Customer Overview

A worldwide leader in software, services and solutions, this customer helps people and businesses realize their full potential.

One of this customer’s product offerings includes a line of business management software applications that automate and streamline financial, customer relationship management, and supply chain processes. The target market includes retailers, manufacturers, wholesale distributors, and service companies operating worldwide. The customer sells its products and service through authorized channel partners.

Business Challenge

Each month, this customer’s Web site receives more than 1.2 million visits from potential buyers, 4,000 of these visitors request additional information. The customer provides three communication channels for requesting additional information:

- Call a toll-free 800 number
- Request a callback from a representative
- Engage in a live “chat”

The challenge for this customer was to effectively manage these 4,000 monthly interactions to meet its sales conversion goal of 800 sales opportunities a month.

SEI Solution

SEI offered a high-quality sales solution, managing communications with potential buyers through all three communications channels. Our sales professionals were trained in the customer’s solution selling process to understand potential buyers’ business challenges, and identify potential software product solutions to solve specific business issues.

1-800 phone inquiries and call backs are qualified based on the likelihood of sale, and tracked using the customer’s sales pipeline system. Often these sales opportunities are tagged as hot sales leads by the customer’s partner community. SEI’s “chat” team conducts proactive “live chats” based on potential buyers’ browsing habits using appropriate chat rules. Regular rule reviews are conducted to assess if the right traffic is being driven through the proactive “chat” channel.

By effectively managing buyer interactions and qualifying the highest quality leads with the highest probability of sale, the SEI sales team has become a trusted team member to this customer’s marketing team.

Quality is key to the success of this offering. The SEI team uses a variety of monitoring and coaching techniques to support our sales professional’s ability to deliver the highest quality sales service:

- Side-by-Side Coaching – SEI sales team leaders regularly conduct 1-on-1 coaching sessions with our sales associates to review positive results and development areas
- Transcript Review – the SEI team reviews “chat” transcripts to identify sales trends, positive results, and development areas
- Group Transcript Review – the “chat” team is brought together to evaluate each other’s “chats” in a group setting, identifying positive results and development areas
- Regular Evaluation of Results – progress against pipeline revenue goals is monitored and reviewed on a daily basis to proactively show sales associates their accomplishments against their goals

Tangible Results

SEI’s Web-to-telephone lead generation and Web-based proactive “chat” offering has exceeded this customer’s aggressive sales goal targets.

The SEI “chat” team has generated a sales pipeline of more than \$80 million for this customer, while realizing an increase in sales team productivity of 25%. Two-thirds more visitors now use the “chat” communications channel. SEI’s sales professionals can handle the increased volume because they manage up to three chats simultaneously, providing a potential return on investment of up to 3x higher than inbound calls.

SEI’s Strategy

From the beginning, SEI took the time to understand and identify this customer’s business strengths and development areas, developing an approach to execute against tangible sales targets, and drive efficiency and productivity through thought leadership.