



for Credit Bureaus

Certegy Automates Lead Generation and Check Verification Services to Achieve Unprecedented Productivity and Sales Gains

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Mike Zalansky, Sales Manager, Certegy Check Services



SITUATION

Certegy Inc. provides credit, debit and merchant card processing, e-banking, check risk management and check cashing services to over 6,000 financial institutions, 117,000 retailers and 100 million consumers worldwide. Headquartered in St. Petersburg, Florida, Certegy maintains a strong global presence with operations in the United States and abroad. As a leading global payment services provider, Certegy offers a comprehensive range of transaction processing services, check risk management solutions and integrated customer support programs which facilitate the exchange of business and consumer payments. Certegy's two main business units—Card Services and Check Services—are organized to enable targeted services and systems that address diverse customer needs.



CHALLENGES

A Need for Increased Productivity

Certegy's Check Services business unit, and its Specialized Business Services Group sales team, were engaged in outbound telesales campaigns with the purpose of selling and provisioning check verification services to businesses around the globe. Certegy had divided its team into two groups: a centrally-located lead generation group and a direct sales group distributed regionally.

The lead generation process involved searching for telephone numbers in multiple lead lists, dialing those numbers, delivering a complex sales script with multiple variations, capturing or modifying data in their CRM application, dispositioning the call result (interested, not interested, wrong number, answering machine, etc.), assigning leads to the appropriate geography, and then notifying the direct sales rep, and the regional sales managers, of the new lead.

While not an overly complex sequence of events, the process was cumbersome because each of the activities occurred manually and multiple systems were not coordinated centrally. As a result,

productivity was suffering before, during and after the calls because the databases were not synchronized and the telephone system was disconnected from their other systems. Inside sales agents were spending more time preparing for calls than engaging in lead qualification. Consequently, regional field sales representatives were getting fewer leads, and ultimately sales, than they required.

“We knew that productivity could be drastically improved if we implemented a technology solution that automatically connected the data, the CRM system, and the telephones,” said Mike Zalansky, Market Partners Sales Manager at Certegy. “But an equally important concern was quality. We needed to contact more leads in less time, and the leads had to be better qualified.”

Unqualified Leads and Unacceptable Conversion Rates

As a leading global payment services provider, Certegy recognized that, in order to remain competitive, they could not compromise productivity for quality. This meant that the inside sales team had to quickly, and accurately, qualify leads and notify field sales of new, legitimate opportunities. But because of the manual procedures and the lack of integrated systems, inside sales were passing inaccurate information to their counterparts either due to data entry errors, or were otherwise rushed in their attempts to properly qualify the leads.

“We passed leads to field sales as quickly as we could, but in the rush to do so, our agents inadvertently made data entry mistakes, or directed leads to the incorrect regional office,” said Zalansky. “Our credibility with field sales was at stake, as was the company’s position in the market. We had to find a way to ensure agents adhered to the call script, followed guidelines regarding qualifying prospects and capturing data, and to guarantee that field sales offices were receiving legitimate opportunities that were mistake-free and properly routed.”

Lack of Visibility into Day-to-Day Performance

Certegy’s lead generation and field sales managers had no real-time visibility into the day-to-day activities of their staff. Managers of the outbound calling team could not easily monitor the performance of their callers in order to train-up for better call results. Additionally, inside sales did not know if they had transferred ineligible leads or mistakenly sent a lead to the west regional office, for example, that should have gone to a different region.

“In a sense, we were flying blind,” admitted Zalansky. “We could generate reports from our CRM system, and we could tally results from the paper-forms and logs that our inside sales agent kept. But that, too, was time-consuming and not always reliable. I was convinced that the right technology solution, from a reliable vendor, could help Certegy automate and speed-up these processes and let us focus on quality lead generation.”



SOLUTION

Having previously engaged Interactive Softworks for a similar project while with a different company, Mr. Zalansky returned to the well in the hopes the software company could deliver the technology solution he envisioned.

“I had worked with Interactive Softworks before when managing a call center for a previous employer, and we achieved excellent results with their VoiceNet call center software solution,” Zalansky explained. “But what excited me the most was that they also offered a middleware and business process management solution, their Metaphor product, that could facilitate the integrations and complex business logic that we knew we’d need to connect and automate our systems and business processes.”

Ultimately, Zalansky and Certegy selected Interactive Softworks to deploy their entire arsenal of software solutions: VoiceNet™, a unified contact center solution with powerful predictive dialing, scripting and monitoring capabilities to address agent productivity, and Metaphor™, a standards-based SOA and Interaction Management Suite, that would provide a platform to integrate the dialer with the CRM system, centralize all call and sales data and provide the tools to automate business processes based on complex business logic.

With VoiceNet’s predictive dialing capability, Certegy’s inside sales team was no longer forced to manually dial telephone numbers or waste valuable time by connecting with answering machines or reaching wrong numbers. With call lists pre-loaded, VoiceNet predictively dialed phone numbers based on agent availability—significantly reducing the amount of time required to contact prospective customers and noticeably increasing the number of right-party contacts and total sales. VoiceNet also served-up a series of screens that provided the agent—within a single application interface—script cues, dynamic data such as the prospect’s name and company, and data entry fields to guide the agent through the lead qualification process.

Using Metaphor’s web services development framework, an integration between VoiceNet and the CRM system was established to facilitate an automated exchange of data. This meant that when an agent completed an outbound call, the results of the interaction were automatically transferred to the CRM system, thus removing the need for further manual processing. And, based on the underlying business logic, qualified lead notification emails were sent to the appropriate regional office for further processing.

VoiceNet and Metaphor have given Certegy everything they needed to increase productivity by removing iterative, time-consuming processes, and the extra time afforded to the inside sales team has allowed agents to contact more prospective customers and to do a better job of qualifying leads, while giving supervisors an easy way to monitor agent performance.

“We use the built-in reports available to us by VoiceNet, as well as some of our own customized reports, to assess daily call volumes and dispositions, per-call handle time, and numerous other metrics previously unavailable to us,” said a pleased Zalansky. “We can also monitor agents easily, either during a call or afterwards, to make sure our agents are sticking to the script and asking the right questions—which has resulted in more sales.”



RESULTS

Dramatic Productivity Improvements

In the first month alone, Certegy experienced unprecedented productivity improvements by generating 578% more leads than the previous month. Actual agent talk time increased from only 12 minutes per hour to over 40 minutes per hour. By generating more quality leads, Certegy's inside sales agents have given their direct sales force more opportunities to close more sales.

Performance Turnaround in Less Than One Month

In less than a month, and with only a single person resource, Interactive Softworks was able to help Certegy achieve their productivity and quality goals. Within twenty days Interactive Softworks installed both software solutions, trained agents to use the dialing system, wrote complex call scripts, business rules and web services to facilitate system integrations, and had the entire solution production-ready.

Decreased Cost of Doing Business

Each of Interactive Softworks software solutions have made truly positive impacts on Certegy's lead generation activities. VoiceNet has dramatically reduced the amount of time agents take to qualify individual contacts, and the built-in data management has removed manual-error and improved data quality at the same time. Thus, Certegy's cost-per-lead has been significantly reduced.

Metaphor has eliminated the manual process of communicating new leads to regional offices by automating communications, and in this way Certegy has maximized their investments in other technologies. Certegy did not have to replace their CRM system with a new or proprietary solution, and no time was lost in learning a new application.

A Scalable Solution for Sustained Results

Because Interactive Softworks products are designed with scalability in mind, Certegy can always scale-up or –down with market demand. Increasing the number of agents on the lead generation team is as simple as adding new software licenses, and the business logic, coordinated by Metaphor, is capable of supporting millions of transactions per day.

Better Accountability

Certegy's management team now has better insight into the day-to-day activities of their agents by virtue of the call monitoring and recording capabilities of VoiceNet. Supervisors can accurately assess performance issues and train their agents according to that analysis.

Similarly, built-in and customized reports have given Certegy real-time, detailed information about numerous performance metrics that help them accurately forecast results and manage work performance.

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Interactive Softworks

Interactive Softworks provides technology solutions to business problems. We offer enterprise-grade software products and consulting services that make it faster, easier and more affordable for companies to achieve intelligent interactions that span business initiatives, systems and user interfaces, regardless of complexity, volume or channel.

Our software connects people, suppliers, and systems with market partners and end customers, and helps better manage the Interactions between them. Our software suite gives business and technology users a faster, more cost-efficient way to create the key components of smart Interactions: integrated systems, business processes, and user interfaces that orient business towards customer needs, as well as the tools to deploy, manage and evolve interactions once they are live.

The company's headquarters are in Leesburg, Va., with additional North American locations and partner locations in Europe, India and Latin America.