



Customer Case Study

Direct Business Lending

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Reduce Contact Time on Leads:
Direct Business Lending runs a call center that was utilizing push lead management. Leads were typically being contacted within 35 minutes on average which was holding them back from rapid growth.

Direct Business Lending is a small and mid-size business consulting firm with a passion for helping entrepreneurs succeed. They help their clients with consultative services like professionally written business plans, access and preparation to funds needed to help small businesses grow, website development, and marketing consultation. In the last 2 years they have helped hundreds of businesses reach their goals. In early 2014, Direct Business Lending engaged ClickPoint Software to help them with their lead management solution.

The Goal: Switch from Push to Pull lead management and utilize automated marketing for leads that were not currently ready to start using their services. Respond to new online lead inquiries in 5 minutes or less.

Direct Business Lending knew that other companies had achieved a lot of success with a pull lead management solution. They wanted to implement this solution but were unsure of the complexity, lost productivity while making the move, and the learning curve for their sales team. In order for their business to scale and reach their own targets for 2014 they knew that they needed a partner that could help them deploy this solution quickly, on budget, and help them create best practices that worked specifically for B2B.

ClickPoint used a dedicated support representative to help assess the situation and diagram the sales process that Direct Business Lending used on a daily basis. The ClickPoint team worked to not only setup the Pull solution, but to build an automated marketing solution that would work with the pull system. A Pull solution essentially allows agents to pull leads from a queue, rather than assigning leads to sales agents and hoping they follow up with each lead. With a Pull solution, a single lead is called by 5-10 different agents, depending on the rules you have established. Ownership of a lead only occurs once a milestone has been hit such as; face to face appointment. This type of solution really plays to the strength of your sales team, with the most aggressive agents getting more access to leads. It has been shown that this type of lead management solution can drastically reduce contact time on leads and improve lead follow through.



Benefits of Engaging ClickPoint Software and SalesExec Lead Management Solution

- ✓ Increase ROI from leads by utilizing pull based lead management, decrease response time on leads by 95%
- ✓ Pull based lead management helps direct business lending reduce internet lead contact time by 95% resulting in 35% lift in sales revenue.
- ✓ Direct Business Lending had a 33 minutes avg. salesperson response time on internet leads originated through their website. Only 10% of their leads daily were contacted under 15 minutes and a less than 2% were contacted under 5 minutes.
- ✓ After initiating a pull based system with SalesExec the Direct Business Team quickly was able to contact 70% of their leads in under 15 minutes and nearly 50% in under 5 minutes.

“Before we engaged ClickPoint and started using SalesExec we had given up hope that there was a lead management solution that we could use that was simple to deploy, yet powerful. We had looked at every solution on the market and all of them had ease of use barriers, cost barriers, and we would have rather stayed with our in-house solution rather than go through the pain of trying to configure these antiquated solutions. ClickPoint had us using the system within a couple of days, something I never expected.”

Roy Ferman – Partner, Direct Business Lending

Country / Region

United States, United Kingdom, Australia, South America, and Europe.

“The ultimate lead management and lead distribution system for companies that sell leads.”