



Customer Case Study

EZRateQuote

1 (866) 372-9431
www.clickpointsoftware.com



More leads, Better Quality: EZRateQuote wanted to generate more leads with better quality by utilizing LeadExec for real-time delivery of leads, real-time lead scoring, and internet lead order fulfilment.

EZRateQuote is a lead aggregator and lead sales company that specializes in debt and mortgage leads. EZRateQuote services several large financial clients in the U.S. and abroad. In 2012 EZRateQuote found itself with increased demand for its high quality leads. EZRateQuote focuses on delivering high quality leads by creating exclusive marketing programs for its clients, however, the company was unable to scale its business to meet client demand.

ClickPoint Software, Inc. headquartered in Scottsdale, Arizona, is a leading provider of simplified lead management and automated marketing solutions. The company provides a solution for both marketers and sales teams that integrates seamlessly, for better sales and lead performance reporting. ClickPoint solutions are currently in use with lead generation companies, service providers, franchise based companies, call centers, financial and insurance companies, and thousands of individual users in many countries.

The Goal: More leads, better client management, better quality, and scalable solutions

EZRateQuote wanted to separate itself from the competition by providing a better customer experience for their loyal customers. EZRateQuote came to ClickPoint Software seeking a solution for providing a customer portal for purchasing leads, returning leads, printing leads, managing leads, and to provide a place where their customers would feel like they were getting more value from their lead programs.

For their business to scale and reach more customers with their time sensitive product offering it was critical that orders could be placed and that leads would be delivered in real-time. In order to grow the EZRateQuote family of companies, they knew they had to have a lead delivery system with automation, scalability, and flexibility for new verticals as they emerged.





“Before ClickPoint Software we searched for any company that could offer just part of what we were looking for. There were some companies that had maybe 20% of the total solution that we needed. ClickPoint was the only one that offered nearly everything we needed and at a cost that allowed us to get started right away.”

Kevin Benner – Founder, EZRateQuote

EZRateQuote had to find a solution that would help automate the lead ordering process. The solution would involve parts coming together to offer scalability for new verticals and company growth.

EZRateQuote also had the need to deliver leads quickly and to multiple buyers with different requirements for accepting leads. Most other platforms were sluggish, not allowing a seamless lead delivery within an acceptable amount of time. This meant the customer experience was hampered by EZRateQuotes inability to provide a real-time solution that would work with their client requirements.

Benefits of Engaging ClickPoint Software and LeadExec Lead Management Solution

- ✓ **Automated Orders:** EZRateQuote started working with ClickPoint Software to create a solution that would improve their ability to quickly set up and automate lead orders, thereby improving the customer experience.
- ✓ **Automated Lead Delivery:** The lead distribution system had to provide many of the tools necessary, but also be customizable to meet the needs of EZRateQuote customers in many different types of industries.
- ✓ **Lead Capture:** Integration with websites so that orders could be placed online and integrated with the back office lead distribution system was a necessity. Credit card payment needed to be integrated and run instantly on the site. There needed to be visibility as to which clients had paid, those who had not paid as well as those who were declined.
- ✓ **Lead Database:** A lead database that was able to deliver leads based on quantity, price, and other distribution settings. The leads would need to be delivered to the customer portal as well as via email. E-mail with an embedded link was preferred.

- ✓ **Redirects:** Leads needed to be redirected to a thank you page for business opportunity buyers. Clients would not order leads unless the lead is redirected to the business opportunity after initial interest and lead application is filled out. The redirect needs to occur under 15 seconds.
- ✓ **Lead Type Library:** EZRateQuote needed a system that would allow them to move into other verticals as the economy shifted from one industry to another. With the LeadExec lead type library they could easily pick new lead types, or add and edit their own.
- ✓ **Customer Portal:** The customer portal needed to improve the customer lead buying experience. There needed to be lead management, lead returns, printing, and the ability to order leads or place an order on hold. With the LeadExec white label client portal, it was easy for EZRateQuote to make the client portal their own.

Country / Region

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

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