Insite helped a North American beauty and personal care company dramatically increase its lead-to-appointment conversion ratio.

A North American beauty and personal care company recently partnered with Insite to optimize its outbound dialing department. The company's goal was to improve the process of turning leads into appointments to realize its sales conversion goals.

Challenges
Dialer platform presents functional deficiencies

Mismanagement of qualified marketing leads

Low outbound call volume

Appointments and leads significantly under target

Solutions
Customize dialer for optimal functionality

Organize leads for dialer efficiency

Clean lead data before entry

Change outbound area code to match lead geographical location

Results
Outbound dial count increased over 6x

Appointments set per lead increased by over 22%

Appointments set reached a record high

Appointment shows increased

Challenges

Prior to Insite's engagement, the beauty and personal care company had purchased a dialer platform, however, the technology was only partially utilized. Although the firm captured qualified leads from several sources, the leads were not organized according to sales potential. Furthermore, agents dialed outbound sales calls manually. The department's appointment-to-lead ratio fell below target through disorganization and low call volume.

Solutions

Insite embedded within client operations to understand the current state. We reworked the dialer platform so that it could be utilized by all outbound dialing agents. We also built real-time reporting visualization capabilities. Agents began using automated preview dialing systems to place their calls.

Next, Insite began cleaning and formatting incoming marketing lead data for smooth integration into the dialer. We also organized the mass lead repository into three triage buckets: green, orange, and red.

The green bucket holds new leads no older than three days. These leads provide the highest sales potential and receive a set number of dial attempts over the next three days. After four days, leads transition to the orange bucket where they are nurtured with a different approach. The red bucket contains leads older than eight days. Contact is attempted for a set duration until they either set an appointment or wash out.

Insite also deployed a program to reflect the area code of the location called. For instance, if the lead resides in New York City, the 212 area code appears when their phone rings.

Results

With agents using the automating dialing system instead of dialing manually, outbound dials jumped from 24,153 in June 2021 to 156,794 calls in June 2022. This created higher lead list penetration with increased contact rate.

Even though the number of leads in this same month shrank from 13,249 in 2021 to 7016 in 2022, the appointment conversion rate went from 41% to 67%. A greatly increased "Speed to Lead" factor contributed to this success.

And after this company met its appointment volume objectives, the number of new customers who actually showed at those appointments also increased.