



five **9**

1 + 1 = 3

Integrating Sales Technologies for Exponential Results

Whitepaper

June 09



Executive Summary

Companies in financial services, insurance, education and many other industries that depend on sales leads as their life blood, are integrating cost-efficient sales technologies to increase revenue and ROI from sales and marketing. This is being accomplished by using predictive dialing systems with the better business processes, workflow and intelligent decision-making inherent in lead management software. This white paper outlines how the combined solutions are enabling faster speed-to-contact and increased sales for leading organizations today.

That Was Then: A Day in the Life of Two Sales Agents

Monday, 9:05 a.m.

John is a sales agent for a medium-sized mortgage broker. When he arrives at his desk, he logs in to his company's lead management system and sees 10 new Internet leads on his desktop. He also sees that he has a variety of appointments and reminders to help him know whom to follow-up with from the last few weeks. He appreciates how the system helps him know which leads to call, when to follow up, and what to say.

The problem is that manual dialing slows the process, and in John's business, speed often determines success. So John gets coffee and starts dialing. He reaches a few of his newest leads, but the older ones on his list aren't as easy. Finally, at 9:45 a.m., he makes contact with a human voice at the other end of the line. It's a good thing, because another three new leads and 20 older leads have just been sent to him. He faces a long morning of manual calling when he could be spending time doing what he does best—selling.

Monday, 9:10 a.m.

At the insurance company down the street, Mary faces a similar scenario. Mary is a sales agent for an insurance firm that recently invested in predictive dialing technology to accelerate the rate at which agents contact new leads, and efficiently route the calls to the appropriate agent on staff. The solution has improved her outbound dialing capabilities, tripling the number of calls she makes each day. She loves the way the

system has increased her ability to get prospects on the phone quickly, but with the increased volume, she wishes for a way to organize and track where each prospect is in the sales process. What she needs is a tool that would let her better manage the increased number of conversations she is having, helping her schedule follow-ups or automatically send e-mails as another way of "touching" her prospects.

This Is Now: The Beauty of a Combined Solution

Mary and John's productivity is dramatically enhanced when their companies integrate predictive dialing and lead management software. Five9's on-demand call center technology and Leads360's lead management solutions are designed to work in concert—and are delivering results to companies like John's and Mary's.

- Speed-to-contact is dramatically improved.
- Opportunities are more plentiful.
- Every lead has increased value.
- Follow-up is better managed.
- John and Mary close more deals as a result.

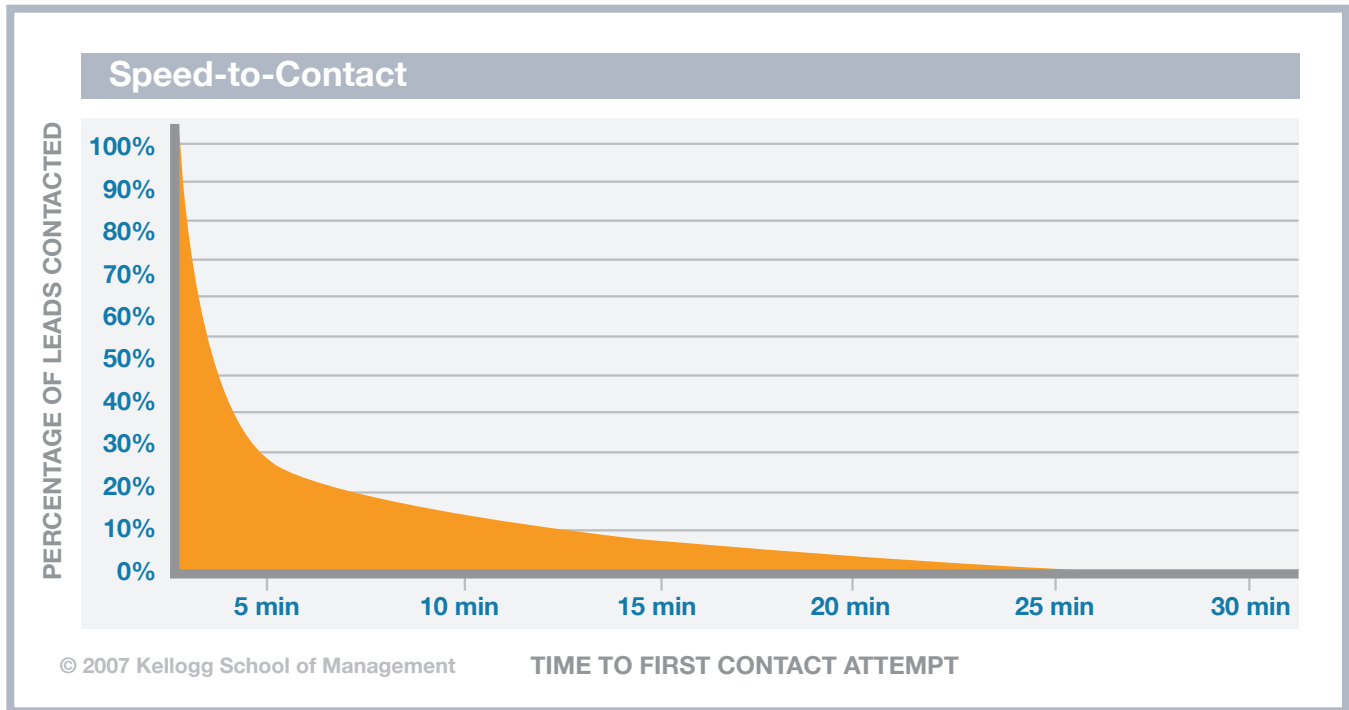
Predictive dialing does the heavy lifting of automatically dialing hundreds of numbers until prospects are reached and routed to a sales agent. Lead management solutions are the brains behind the brawn, routing leads to sales people, prioritizing call queues, sending follow-up e-mails, and then providing a full complement of tracking, monitoring and coaching tools to help the sales team work smarter to achieve their goals. It's a system that handles the workflow of lead management across the sales lifecycle.



1 + 1 = 3: Exponentially Increased Value

With integrated predictive dialing and lead management, companies are finding they have a solution that is greater than the sum of its parts, delivering measurable value across the organization.

Next to the Five9 window on John's desktop is a Leads360 window that provides all the details about John's connected leads—name and phone number, loan scenarios, credit scores and any other available, relevant data.



Faster Speed-to-Contact

Now all John has to do is log in to the Five9 system when he comes to work. As soon as a group of leads are automatically posted into the Five9 dialer, the system will immediately call the prospects, so that John can go from connected call to connected call, without interruption. Using a predictive dialer can increase John's sales revenues up to 300% by tripling the amount of time he can spend talking to prospects. If the prospect is reached, the system routes the call and an accompanying alert to John.

The best part: Five9 only feeds leads to agents who are logged in to the system, the more agents that are logged in, the faster the system works—dialing through leads and distributing actionable calls to agents who are poised and ready for action.

More Productive Calls

Five9 can feed detailed customer data from Leads360 into the dialing system for scripting purposes and talking notes in an HTML script for John. It could be the winning sales pitch from the top sales agent on

John's team. In fact, everyone on John's team is now able to use the pitch because it's right in front of them on their desktops.

For example, when John takes a call, a screen pops up with the script and customer information. He can say, "I see your current mortgage is \$300,000 and you're looking to refinance," and he can make notes in Leads360 as his system of record. He can also change the status of the call. When it's time to "Take Application," the status change can trigger all the necessary workflows to accomplish the application process, even linking automatically to a third-party loan origination system if necessary.

In fact, when Five9's dialing is connected to the database and the connectivity advantages of Leads360, the dialer can interface with all kinds of existing integrated systems through Leads360, even connecting with debt calculation and loan pricing applications to add even greater efficiency and value to John's conversation.

Smarter Workflow

Leads360 will post instructions to determine which leads should be called first by the Five9 dialer—based on the calling campaign the company has built within Five 9, or whatever other business rules the company chooses to follow. For example, fresh Internet leads—the ones that demand immediate attention—can be prioritized. Trigger leads—cheaper leads that are not

as urgent—can be set for calling on a less aggressive schedule. The point is that managers have the confidence of knowing that leads are being actively and aggressively worked according to the regimen they set for it; nothing goes ignored with Five9 dialing according to Leads360's instructions. Lead management and dialing can also collaborate to extract maximum ROI from older leads that did not convert immediately. Leads that meet certain criteria (for example, those that have not been contacted in five days) can automatically be posted by Leads360 and dialed by Five9 until contact is reestablished. If the customer says "call me back in an hour," agents can set the system to make the call automatically.

Thorough Follow-Up.

Leads360 sends an automatic e-mail follow-up—an important process for staying engaged with prospects. Companies find real value in being able to automatically generate an e-mail before and after a call to a prospect—for example, one message might say "I'm still trying to reach you and will call you tomorrow. Or contact me at ...". Thorough follow-up is especially important in today's market when you look at the loss of potential revenue for companies without effective processes in place for nurturing leads that don't close immediately. Forrester Research reports that companies following mature lead management processes—like the ones enabled by the integrated Five9/Leads360 solution—have closing rates 300% higher than their competitors who do not stay in touch with qualified leads.



Cost Of Poor Follow-Up Across Industries

Although sales agents tend to concentrate on hot leads, the majority of potential revenue derives from leads that do not close immediately. The chart above illustrates the impact of abandoning “not yet ready” leads. In the

debt settlement industry, for example, contact is made with about 70% of leads. Of those, 43% qualify at the time of the first call, yet only 5%-10% will close quickly. All the more reason for having processes in place— best practices for nurturing leads and ensuring they get proper follow-up all the way to closing the sale.

Cost Of Poor Follow-Up Across Industries

RESULTS

Industry	#Leads	#Contacted	#Qualified	Closed Quickly	Abandoned Leads	Abandoned Lead cost	Lost Leads
Mortgage	1000	750	350	2	249	\$6,970	\$31,365
Debt	1000	500	500	3	497	\$9,940	\$59,640
Loan Mod	1000	500	400	3	397	\$7,940	\$35,730
Insurance	1000	650	550	30	520	\$4,160	\$26,000
Education	1000	750	150	10	140	\$5,600	\$84,000
AVG	1000	630	390	10	381	\$6,922	\$47,347

The chart shows just how costly improperly worked leads are in a variety of business-to-consumer industries. Data is based on analysis of 15 million leads and the assumptions listed.

ASSUMPTIONS

Industry	Cost Per Lead	Revenue Per Sale	Contact %	Qual %	Overall Close %	Quick Close %
Mortgage	\$20	\$3,000	75%	35%	3%	0.15%
Debt	\$20	\$2,000	50%	50%	6%	0.30%
Loan Mod	\$20	\$1,500	50%	40%	6%	0.30%
Insurance	\$8	\$500	65%	55%	10%	3.00%
Education	\$40	\$20,000	75%	15%	3%	1.00%
AVG	21.6	5400	0.63	0.39	0.056	0.95%

Better Sales Performance

With the two integrated systems, managers know their salespeople are talking to qualified leads when they are on the phone, not dialing dozens of possibilities hit-or-miss. Companies are finding that the blended systems

extend a discipline across the sales team that keeps everyone working efficiently and making the best use of their time. The combination works. Companies using the combined solutions are seeing dramatic improvements in conversions and qualifications because leads

Accurate and Actionable Data

Integrated lead management and dialing provides managers with complete visibility into the activity and effectiveness of their sales efforts. Truly integrated systems mean that managers have access to valid, insightful and actionable data. While managers can compare John and Mary to their colleagues, John and Mary can track

their own performance metrics with what they achieved last week or last month. Meanwhile, managers can make informed decisions about which lead providers to buy from based on accurate and actionable data. The systems also have call recording and call coaching features that help agents with less experience learn the ropes quickly.

Available Metrics Include:

Agent Work & Performance	Sales Process & Required Actions	Lead Quality & Marketing ROI
<ul style="list-style-type: none">• Action history• Call activity• Call duration• Call success• Contact attempts• E-mail history• Speed-to-contact	<ul style="list-style-type: none">• Appointments• Lead distribution• Lead history• Lead redistribution• Next Required Action• Real-time e-mail• Reminders open notifications	<ul style="list-style-type: none">• Average contact• Contact rate• Conversion rate• Marketing ROI• Qualification rate attempts required

Aren't We Talking a Lot of Money Here?

No. Today, sophisticated dialing systems that once cost hundreds of thousands of dollars are available to a much wider audience at a much lower cost. Software as a Service (SaaS) offers a viable alternative to organizations that want access to next-generation solutions and their benefits without incurring high up-front costs. Leads360 and Five9 specialize in making the sophistication and performance of multi-million dollar, custom-built hardware and software available to businesses at affordable prices.

How Do These Technologies Integrate?

Key integration points in the Five9 and Leads360 systems enable a combined solution that works smoothly and seamlessly.

Complementary Architecture. Both solutions were built to integrate easily with third-party systems.

Instant Synchronization. Five9 and Leads360 are able to synchronize data instantly and trigger seamless actions in each other's systems. This eliminates work



and wasted time for sales agents, while empowering managers with actionable data and metrics.

Today's Best Practices. Putting the Five9 and Leads360 systems together leverages intellectual property and today's best practices for closing leads. Not a CRM system, Leads360 is designed specifically for lead management. It's the ideal for a predictive dialing solution. Together, the two systems are setting a new standard for aggressive, productive lead management practices in sales organizations today.

Case Study: Increased Sales for Alliance and Associates Insurance

With integrated systems from Five9 and Leads360, Jacksonville-based Alliance and Associates Insurance has increased its first-day close ratios on leads from 5-7% to 12-15%.

"The systems work phenomenally well together," said Todd Poynton, IT, Sales and Marketing Manager for the company. "We've seen our numbers increase and productivity increase as well—our ability to touch more clients and actually be in contact with them via phone call or e-mail."

Alliance had looked at on-premises predictive dialing systems a few years ago, but found them cost prohibitive and complicated to use. "Technology has become easier and more user-friendly, and less expensive, too," he said.

Poynton also appreciates Leads360's ability to keep

leads moving through smart workflow management:

- If an agent has ignored a lead for 20 or 30 minutes, the system pushes the lead to another agent to work.
- If an agent has not been doing follow-up on a lead and a few days go by with no action, Alliance has set up the system to pass the lead to another agent.

"It's a more effective way to track leads and be sure they are worked in a timely manner," he said. "The tools Leads360 has in place are incredible. It's a seamless, fast and very effective workflow system." Alliance has seen follow-up responses increase through the calling and emailing capabilities of the combined systems. "Prospects get automated emails from Leads360 that go out on day 20, day 30, day 45, and at some point the prospects finally get automated to answering the e-mail," Poynton said. "An event might have happened in their life where someone in their family developed a severe medical problem and it's caused them to think about needed insurance. If we had to send those e-mails out manually, it would be very time-consuming."

Alliance did some customization to the integrated systems, creating a "Shark Tank" in Leads360 for leads 12-15 months old. "We configured Leads360 to automatically post the leads to Five9 for dialing, so as our agents were working newer leads, these older leads in the Shark Tank were being called as well," Poynton said. "If the dialer contacted a lead in the Shark Tank, it would send the lead to an agent and update its status



in Leads360. Being able to work these older leads in between the new ones is a great way to increase agent productivity.”

Conclusion

With integrated predictive dialing and lead management, companies are finding they have a solution that is greater than the sum of its parts, delivering measurable value across the organization:

- Faster speed-to-contact
- More productive calls
- Smarter workflow

- Thorough follow-up
- Accurate, actionable data
- Better sales performance
- Improved organization

Lead management solutions route leads to sales people, prioritize call queues, send follow-up e-mails, and provide a full complement of tracking, monitoring and coaching tools, while predictive dialing systems do the legwork for sales agents so they can do more selling. Together, the two deliver results that go above and beyond what each can do separately.

Summary

Leads360’s lead management software and Five9’s predictive dialing solutions have combined to produce superior results for our mutual clients. While using Leads360 or Five9 alone provides industry-beating sales performance, when used in combination any company can take advantage of the same sales technologies that are employed by the largest and most sophisticated sales organizations in the world. We encourage business owners, sales directors, and marketing managers to explore this opportunity to improve business results by engaging in a personalized consultation with your Five9 and Leads360 representatives.

About Leads360

Leads360 is the market and technology leader in Web-based customer acquisition and lead management solutions. We enable buyers and sellers of consumer Internet leads to achieve unparalleled return on investment. Our clients can realize maximum lead value through our purpose-built technology, success-driven training, highly responsive support team, and superior intelligence surrounding lead performance. Leads360 currently manages more than 15,000,000 leads and serves over 2400 clients in the most competitive business-to-consumer industries. For more information, visit <http://www.leads360.com>.

About Five9

Five9 is the leading global provider of on-demand telemarketing, customer service, and call center solutions for customer interaction management. The award-winning Five9 Virtual Call Center is used by call centers and contact center operations of businesses of all sizes, and companies that provide outsourced telemarketing, customer service, and call center services. Customers on five continents profit from Five9’s reliable, robust functionality that is fast, easy, and affordable to deploy for any call center. For more information, please visit <http://www.five9.com>.



Leads360 Functionality

- Add Reminders
- Administrative Features
- Advanced Management
- Auto Refresh
- Automated E-mails
- Best Practices Programs
- Campaign ROI Report
- Campaign Summary Report
- Custom Rules (Push/Pull)
- Customer Reports
- Drip Marketing
- Export leads
- Group Summary Reports
- Import Leads
- Interactive Dashboards
- Lead Attention Meter
- Lead Distribution
- Lead Performance Intelligence (LPI)
- Lead Recycling
- Lead Source Integration
- Milestones
- Multiple Rules Programs
- New Lead Notifications
- Performance Metrics
- Reminder Calendar
- Reports & Analytics
- Return-to-Vendor Report
- Round Robin
- Scheduling
- Send Manual E-mails
- Summary Reports
- Set Filters
- Set Max Leads per Day
- Status Summary Report
- Toggle Lead Flow
- Training and Support
- ROI Calculations

Five9 Functionality

- Auto Dialer
- Automatic Call Distribution (ACD)
- Call Scripting
- Campaign and List Management
- Computer-Telephony Integration (CTI)
- Customer History Database
- Data Import
- Do-Not-Call List Compliance
- Interactive Voice Response (IVR)
- Predictive Dialer
- Toll-Free Numbers
- Voice over Internet Protocol (VoIP)
- Voice Recording
- Voicemail
- Web Callback
- Web Integration APIs

Five9 integrated with Leads360 enables companies to:

- Instantly send lead data to the dialing system based on custom business rules.
- Automatically feed appropriate lead data to agents when a call is connected.
- Automate outbound dialing to connect agents only when leads are reached.
- Optimize the investment in existing leads by keeping them active through automated workflow.
- Schedule different calling patterns for different levels of leads.
- Improve agent performance with automated tracking, monitoring and coaching tools.