

American Express Merchant Services Contact Center Increases Merchant Sign-up Rate by 250% With Appointment Setting and Lead Warming



Background

American Express Merchant Services provides credit card processing services for small- and medium-size merchants around the country, all of which are served by American Express's team of 140 managers of business development (MBDs). The MBDs are extremely busy field salespeople who spend the vast majority of their days traveling from appointment to appointment to personally connect with prospective merchants.

Challenge

MBDs are on the road constantly, selling and servicing their existing merchant accounts. Although lead qualification and appointment setting are crucial to their business, their constant travel impedes their ability to make focused phone calls, follow-up and schedule appointments.

American Express was looking for a way to help its MBDs be more efficient and effective in the sales process. The company recognized that once the MBD actually met the merchant, sales followed, but setting those face-to-face appointments was challenging.

Solution

Harland Clarke's Contact Center Solutions was a perfect fit for American Express.

The American Express Merchant Services pilot began with 13 MBDs. The MBDs selected specific leads they wanted the Contact Center to handle — mostly merchants they had trouble contacting. The MBDs delivered the contact information to Harland Clarke's Contact Center team directly via Salesforce.com.

Working from a flexible script developed with American Express, the Contact Center team made approximately 100 calls per day. Highly skilled business-to-business call specialists informed merchants they were calling on behalf of the American Express MBD who serviced their account, and wanted to set up a 15-minute appointment to talk about American Express credit card processing. The Contact Center specialists discussed the benefits of meeting with the MBD and invited the merchants to select a convenient time. The appointment was made directly in the individual MBD's Salesforce.com calendar, along with any relevant notes about the phone conversation, and a follow-up email was sent to the merchant on behalf of the sales specialist confirming the appointment date and time.

Conversion at a Glance ...

- *3X increase in percentage of signed accounts*
- *\$5.9 million in estimated incremental revenue from pilot*
- *Estimated ROI of 334 percent*
- *Program rolled out nationally*

Additionally, the Contact Center Solutions team sent audio files of the calls to the MBDs via Salesforce.com so they could listen to the interaction between the Contact Center specialist and the merchant. This enabled the MBDs to be fully informed prior to their appointments.

Results

The pilot program was an enormous success, exceeding the goal for appointments set. In addition, the program nearly tripled the percentage of merchants that signed on as American Express customers following the meeting with their MBD. Prior to the appointment-setting campaign, the MBDs consistently signed on only about 10 percent of the merchants with whom they met versus 35 percent after the campaign. The appointment-setting campaign resulted in approximately \$5.9 million in incremental revenue for American Express, or an estimated return on investment of 334 percent.

Due to its initial success, the program has now rolled out across the U.S. and Canada. What accounts for this success?

- **Focused callers.** Harland Clarke Contact Center specialists were dedicated to setting appointments rather than being focused on paperwork, traveling or managing other tasks. Professional, articulate and attentive business-to-business experts, Contact Center specialists listened to the merchants, offered options and overcame objections.
- **Productive conversations.** Contact Center specialists experienced less resistance and more open conversation with the merchant than the MBDs typically experienced. With merchants' objections addressed, the Contact Center specialists were able to focus on qualifying the lead and passing along crucial business intelligence to the MBD. MBDs found their appointments to be free of many of the typical hurdles because the merchants' objections had already been addressed on the phone.
- **Accountability.** Contact Center specialists are accountable for meeting program goals. Calls are monitored by Contact Center supervisors, who provide ongoing coaching and feedback. Quick script changes and ongoing calibration enable continuous improvement of call flow.

What this means to you ...

Salespeople can't do it all. They are on the go, meeting prospects and closing sales. To allow your sales team to focus on what they do best — face-to-face interaction with prospects — consider working with a partner that can skillfully manage lead qualification and appointment setting.

- **Take advantage of efficiencies.** By relieving salespeople of the tasks of qualifying and nurturing leads and setting appointments, you instantly make them more productive. An efficiency engine like Harland Clarke's Contact Center fuels revenue.
- **Trust experienced professionals.** Our Contact Center specialists are sophisticated professionals who are proud to be an extension of your company representing your world-class brand on every call.
- **Look for the right technology.** Most salespeople are using sales automation software to manage leads and business contacts. Your partners must be able to seamlessly integrate with sales automation technology to save time, eliminate errors and keep your salespeople updated.

Working with Harland Clarke's Contact Center Solutions team enables your salespeople to leverage their strengths while our professionals take care of the logistics for mutual success.

Many variables impact marketing campaign success. The information on earnings or percentage increases that is contained within this case study is provided for demonstrative purposes only. Harland Clarke does not guarantee or warrant earnings or a particular level of success with a campaign.



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