



SalesRoads
1.800.836.4033

www.SalesRoads.com

2825 N. University Drive, Suite #250 | Coral Springs, FL 33065

**SALESROADS IS
THE CATALYST TO
YOUR SUCCESS**



Product Offering:
Payroll Processing

Calling Location:
New Jersey

Service:
Appointment Setting

Business Targets:
50-500 Employees

"THE BILLION DOLLAR IPO"

THE CUSTOMER

Paylocity is a rapidly growing, national payroll provider. As part of their growth plan, they licensed the rights to the state of New Jersey to a well respected leader in the payroll industry.

THE CHALLENGE

Paylocity's management realized that salespeople who prospect are not working efficiently. With that understanding, Client sought the services of a number of outsourced call centers, none of which provided quality appointments or generated a return on investment (ROI).

At the end of 2008, they turned to SalesRoads to create a customized approach and schedule highly qualified appointments for their salespeople.

THE SOLUTION

SalesRoads worked to develop a clear and concise value proposition to easily convey the value of the client's services. Additionally, SalesRoads created HTML emails to send to interested prospects who needed additional collateral before committing to an appointment, and nurturing emails to bring prospects deeper through the sales pipeline.

Finally, to ensure that their salespeople were not over-booked, SalesRoads enabled each salesperson to sync their calendar in real-time with their appointment setting calendar.

SalesRoads also worked with Paylocity to determine a set of parameters that each new opportunity would need to fall under as well as a vetting process to get the most data possible from each call; not just the calls that resulted in an appointment. This data allowed SalesRoads to determine the key demographics that a qualified prospect would fall into, and target those companies exclusively.

THE RESULTS

SalesRoads' customized approach resulted in a 450% ROI for Paylocity in the first 18 months—not including the potential for recurring revenue streams from all sales that were made. In total, SalesRoads generated a 600% overall ROI for Paylocity.

Furthermore, this powerful strategy reduced the overall new client acquisition costs.

In January of 2014, Paylocity went public, with an IPO valued at nearly \$1 Billion.



**PAYLOCITY
WENT PUBLIC
IN JANUARY OF
2014. THEIR
IPO WAS
VALUED AT
NEARLY
\$1 BILLION.**



Product Offering:
Business Incorporation & Compliance
Solutions

Calling Location:
Nationwide

Service:
Outsourced Account Management
(Sales)

Business Targets:
Clients with filings coming due

***"SalesRoads as a whole
was responsible for
driving over 60% of the
BHAG volume. We could
not have achieved this
without SalesRoads'
commitment to our
customers."***

THE CUSTOMER

The Company Corporation (and parent company CSC) is one of the largest Registered Agent service companies the world, representing hundreds of thousands of businesses. The Company Corporation is widely recognized as a leader in incorporation and business compliance solutions for entrepreneurial and small businesses throughout the US.

THE CHALLENGE

The Company Corporation (TCC) had been a client of SalesRoads for nearly 3 years - outsourcing portions of their SMB & enterprise account management, as well as new client acquisition. Throughout our engagement with any partner, we offer solutions to maximize their investment dollar. Through this consultation, we uncovered an extremely profitable solution that was being under promoted - Annual Report Preparation & Filing services (ARP&F).

TCC likes to set lofty expectations for their teams - they call them Big Hairy Audacious Goals (BHAG) - and the Registered Agent approach was no different. Over the course of the year TCC as a whole would have to sell 10,000 ARP&Fs, an increase of 33% from the prior year.

THE SOLUTION

SalesRoads consulted with TCC on best practices, and how to take a solution that was marketed seasonally to a small portion of their customer base, and transition it into a year-long, proactive push. Our team then developed a compelling call approach to entice customers to take advantage of TCC's most profitable solution, which provided TCC with residual streams of revenue from a single sale. Finally, SalesRoads worked with TCC to develop lists of right fit opportunities based on area, entity type, and state costs to then call into.

Through our history with TCC, success was driven by helping their clients understand the intricate concept of business compliance - and simplifying these concepts allowed our agents to be more productive, generate more revenue, while also giving TCC's clients the peace of mind knowing that a professional organization was looking out for their new business.

THE RESULTS

From the onset, SalesRoads exceeded all performance goals and expectations. Because of this, our team was asked to rapidly scale - doubling in size over the course of just 6 weeks. We then maintained the staff to handle the fluctuating lead volume throughout the year.

SalesRoads then helped TCC beat the BHAG nearly 7 weeks early! All told, over 60% of the Annual Report sales were directly related to SalesRoads' efforts.

Additionally, because of the efficiencies of the sales efforts, SalesRoads provided TCC with an exceptional ROI by focusing primarily on a recurring revenue product.



KEY METRICS & RESULTS

- Exceeded all goals and expectations from the onset of the program
- Achieved the BHAG 7 weeks ahead of schedule
- Sold over 6,250 ARP&F units, providing our client with a very profitable recurring revenue stream
- The most efficient, cost-effective solution that the company implemented
- Scaled rapidly to meet fluctuating demand throughout the year

KASH

Product Offering:
Mobile Payment Technology

Calling Location:
California, Oregon, Washington

Service:
Appointment Setting

Business Targets:
Restaurants > \$500k

*“SalesRoads
outperformed all
marketing channels,
including our own, in
booking to close ratio;
our most important
metric.”*



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THE CUSTOMER

Kash is the company behind a ground-breaking mobile payment solution that is eliminating credit card fees for merchants throughout the US.

THE CHALLENGE

After testing of their app with several local retailers, the decision was made to scale the organization. Being a start-up, budgets were tight, and investments needed to be made intelligently. The company decided to test SalesRoads against a competing call center, while also developing their own in-house outbound prospecting team.

Being in the payment realm meant that they would be sharing space with one of the most competitive industries in the country - merchant services. Even though their product was not a replacement for credit card processing, because of the tenacity of providers, it was apparent that the calling approach needed to be markedly different to avoid any unnecessary confusion on the prospects part.

THE SOLUTION

SalesRoads was hired to help deliver appointments for their sales team in San Francisco, CA - but because they had 2 other outbound programs, we had to be extremely selective with our prospects to mitigate any chance of calling out-of-territory targets. We worked closely with our data providers to generate a high-quality database of records, scrubbed against addresses to ensure accuracy.

Once the list was developed, we shifted our focus to building a value driven call approach, which would also be structured in a way that it would not confuse the product with a merchant service call. The call focused on benefits to the retailer, and ways that our client could help them save money and be more efficient when checking out a customer. The approach was a success, and our efforts immediately began producing highly qualified appointments for our client.

A byproduct of a value-driven approach is more engaged prospects that are less likely to cancel or no-show to an appointment. After several weeks, it was clear - not only was SalesRoads providing higher quality opportunities for the sales team, those opportunities were converting at a high rate as well.

When everything was compared, the company's CEO noted that "SalesRoads outperformed all marketing channels, including our own, in booking to close ratio; our most important metric."

THE RESULTS

Today, Kash has expanded their operations from a local San Francisco presence, to multiple sales operations in key areas throughout California, Oregon, and Washington state.

Their teams have been activating hundreds of new clients every quarter, saving those retailers thousands of dollars a month in the process.

Kash's sales teams are more productive, and can focus 100% of their efforts on revenue producing tasks, knowing that SalesRoads will be filling their calendars with high quality appointments.



KEY METRICS & RESULTS

- Created over 300 new sales opportunities in a matter of months
- Highest closing percentage of all marketing efforts
- Provided client with unlimited scalability - helped manage sales expansion throughout California, Oregon, and Washington