



A CASE STUDY BY MARKETOPIA

PBSI Technology
Solutions

LOCATION: Cincinnati, OH

CEO: Ray Cool

CLIENT SINCE: May 2019

SERVICES:

- Half-Time Level Three Business Development Representative

CRACKING THE CODE FOR APPOINTMENT- SETTING SUCCESS

20

technology surveys completed in five months.

6

new contracts signed

CHALLENGE

PBSI was struggling to see continued success in their in-house appointment setting program after three decades of growth. The company was looking for a way to infuse new energy into their appointment setting and help them bring in more leads and sales.

SOLUTION

By adding an outsourced quarter-time business development representative (BDR) to their team, PBSI was able to dig into the needs and pain points of prospective customers, which led to an increase in leads generated and qualified. Upgrading to a half-time BDR increased results even more.

RESULTS

The PBSI sales team is now able to deliver the same level of fantastic results as their service team. Within the first five months of this calling plan, PBSI had 20 scheduled technology surveys and closed six new accounts.

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We now have a sales team that's delivering at the same level as the service team, and what's changed is Marketopia.

RAY COOL CEO of PBSI Technology Solutions

HOW PBSI DIALED-IN TRUE RESULTS

For almost 30 years, PBSI Technology Solutions operated an in-house appointment setting team. But recently, hiring, training and retaining the right callers became increasingly difficult. In 2018, they were only able to generate five leads from their efforts and relied heavily on referrals for new business.

To help generate and qualify more leads, PBSI Technology Solutions signed on with Marketopia for a quarter-time level three business development representative in May of 2019. This BDR calls potential leads, learns about their needs and pain points, and then determines if they might be a good fit for PBSI. Once identified, the BDR sets up a technology survey meeting on behalf of PBSI.

Ray Cool, CEO of PBSI Technology Solutions, went in with realistic expectations when he started his caller plan. He was prepared for results to be slow in the early days of his campaign. However, a slow start is not what he experienced.

“I've done enough sales work over the last 30 years to know that having a caller that can find a qualified lead, and more importantly avoid scheduling unqualified leads, is more of an art than a science,” Cool says.

When Cool and his team hold technology survey meetings with leads, the notes provided by Charlene, his BDR caller from Marketopia, highlight the lead's pain points, buying motivation and other relevant information.

Cool says he and his company are blessed to have Charlene as their BDR caller. He recognizes that finding the right caller can be challenging because they need to have the proper training, supervision, encouragement and motivation to be successful – and that's just what he experienced.

Within the first 30 days of signing, PBSI had more than three technology surveys scheduled with qualified leads. Within the first five months of this calling plan, PBSI had 20 scheduled technology surveys and closed six new accounts.

After three months, Cool upgraded his calling plan in August 2019 to a half-time, level three BDR, thanks to the results from his quarter-time plan. Before working with Marketopia, Cool used to say his company was “delivery rich, but sales poor.” Thanks to their partnership with Marketopia, that couldn't be farther from the truth today.

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