



The Mx Group

## Inside sales/ Lead Qualification Pilot

03/07/18

# Agenda

- What we know so far
- Project objectives
- Our approach
- Project assumptions and estimate
- The team
- Q & A

# Our Discussions

# Brief Background

- Houston based leader in revenue cycle and accounts receivable solutions for more than 40 years
- Offerings focus on revenue cycle, accounts receivable, and contact center solutions within healthcare, financial services and higher ed.
- Specific services include:
  - Appointment scheduling, self pay, Medicaid eligibility, insurance denial management, extended business office, bad debt/collections and legal (support?)
- 2016 rebranding effort resulted in a new name/identity (from United Recovery Systems) and go to market message
- The new web-site and people first message have been well-received and achieved the desired differentiation and “buzz” results

# Next

- Now the focus is on marketing driving revenue growth
- Looking for agency support in many areas including marketing strategy, content creation, interactive and digital marketing and demand creation
- This inside sales pilot project is designed to support the sales team with near term, qualified leads and also evaluate the lift an outside, dedicated resource can provide vs. internal resources.
- The initial effort will be directed towards hospital (Acute, Critical Care and Rural) in sales covered geographies
- Goals...

# Project Objectives

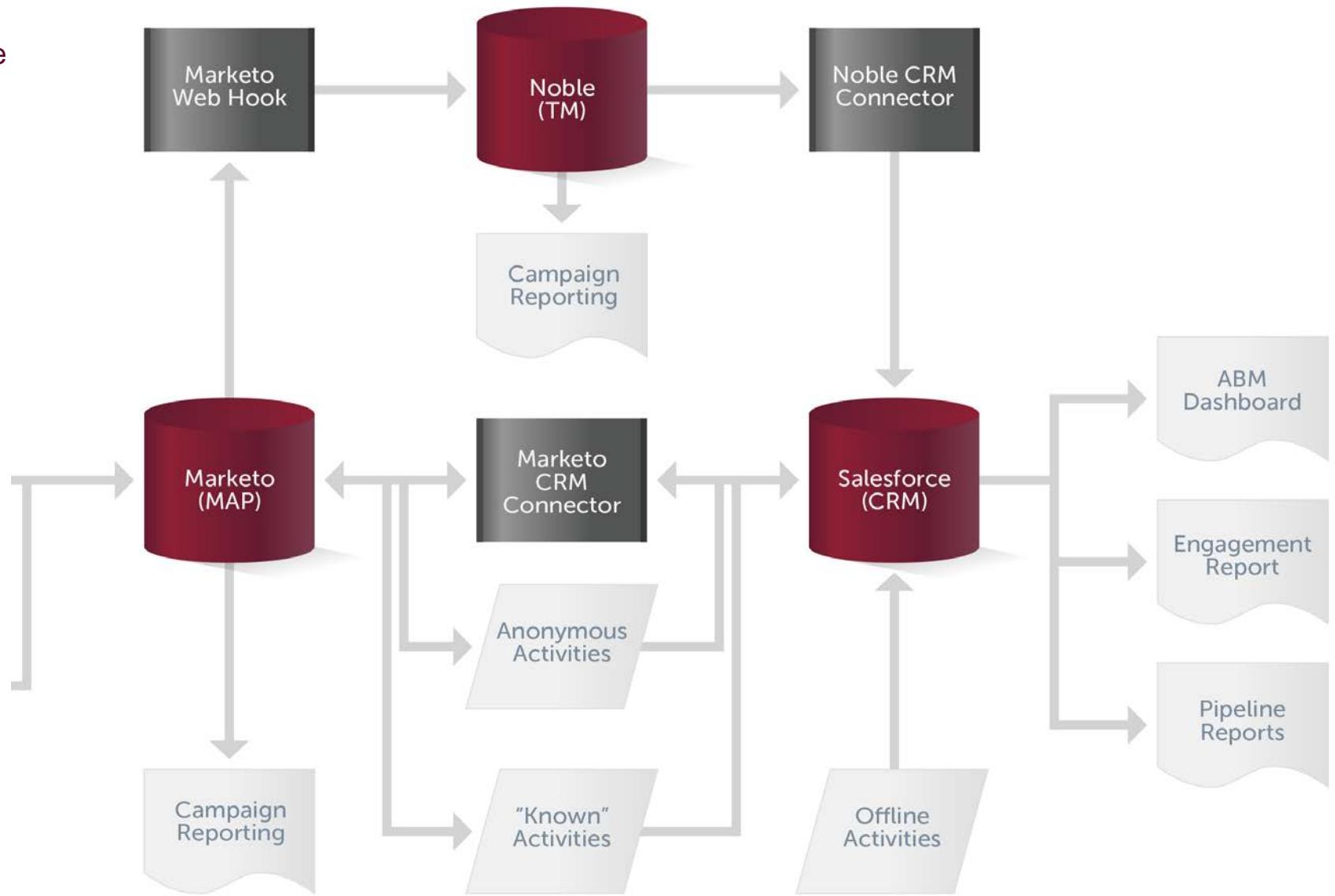
- Near term:
  - Generate SQLs in near term
- Longer term:
  - Collect data and gain insights on selection criteria from call activity results
  - Include “survey” question to gain feedback on message as it related to full service offering ?
  - Help align trigger questions, buy signals and handoff points with reps
  - Establish a partnership relationship

# Approach

# High Level Project Approach

- Campaign kick-off...discovery around your messaging, incentives/offers and lead delivery process
- Design campaign data segments to align with testing approach and reporting
- Align with your team's approach on the landing page and related incentive/offer they will be creating
- Use pre-call email (created and sent by Alltran) with offer as a warm-up
- **Questions:** Follow up emails ? Web hooks into landing page for direct follow up? Sales team communications and feedback loop?

## Alternatives to file exchange



# Proposed Scope

- Kick-off
  - Data review, plan for testing, overall project plan and reporting requirements
  - Confirmation on messaging, qualification criteria and offer
  - Lead delivery and final SOW
- Set-up
  - Mx systems set up
  - Agent training and review/coaching of test calls
- Calling activity (500 records to start, 3 attempts)
  - First round focus on C-Level (500 records, 3 attempts) – test for initial 50 records to measure receptivity of the offer and results
  - Second round focus on management level (approx. 450 records, 3 attempts)



Ongoing management and reporting

# Pricing Estimate

# Initial Estimate

Strategy and Planning	\$3,500
Data review, testing plan, project plan, reporting requirements	
Marketing/Sales alignment on messaging	
Lead management planning and landing page specs	
TM Set-up	\$4,544
Mx systems set up	
Agent training and review/coaching of test calls	
Calling activity	\$6,425
First round - C-level	
Second round - Manager Level	
Ongoing Management and Reporting	<u>\$3,000</u>
Total	\$17,470

# Tools & Technology

# Noble Systems

- Outbound Dialing System
  - Multiple dialing modes and configurable pacing algorithm
  - Area code management – automatically begins and ends calling based on the time of day
  - Busy, Disconnect, No Answer and Answering Machine Screening
  - Speed of call transfer - fastest in the industry
  - Call back scheduling - Agents can schedule agent-specific or general call-backs
- Outbound Call Regulation Compliance:
  - Fully compliant with all current rules and regulations

# Noble Systems

- Advanced campaign management and monitoring tools
  - Call recording, live call monitoring, live call metrics
  - Dedicated agent interface increases efficiency and productivity
  - Agile script development tools allow for on-the-fly adjustments
- Data security
- Integration with marketing automation

# Your Team

# Team



## **Lisa Pasciak, Director of Demand Operations**

Lisa joined The Mx Group in 2008. After two years in the Client Services department, she transitioned into the Traffic department, where she managed internal workflow and individual schedules for various departments. In 2017, she became the director of demand operations, managing the teleservices, sales operations and fulfillment teams. She graduated from North Central College in Naperville, Illinois, in 2007, with a B.A. in marketing. In 2014, she earned her MBA with a focus in project management from Lewis University in Romeoville, Illinois.



## **Percy Thornbor, Jr., Telemarketing Team Lead**

Percy joined The Mx Group in 2016. He brings over 15 years of experience previously working as a Sr. Corporate Partnerships Executive selling advertising, media, hospitality packages and promotions to clients while managing a team of four sales associates. In 2017, he was promoted to the role of Telemarketing Team Lead where he oversees call quality and efficiency measures for all campaigns and manages our call agents. Percy graduated with a B.B.A. in Marketing from Jackson State University.

# Team



## **Kelly Olson, Account Director & Telemarketing SME**

Kelly has nearly 15 years of B2B marketing experience. She has successfully developed and implemented integrated marketing programs for her clients that include product and brand messaging, creative development, demand generation, lead management and sales enablement. In her role as B2B Telemarketing subject matter expert, Kelly aligns programs with best practices to ensure clients see results and maximize their return. Kelly graduated from Concordia College in Moorhead, Minnesota, with a B.A. in business and communications.

# THANK YOU

# About Mx Group



**Atlas Copco**

**TEMPUR+SEALY**

**Rexroth**  
Bosch Group

**HURON**

 **JLL**

**SIEMENS**

**vAuto**

**FLEXERA**

**Vitality**

**Cox  
AUTOMOTIVE™**

 **JPW**  
INDUSTRIES

 **Zekelman** Industries

**Abaco Systems** | **Abbott** | **Alonti**

**Altran** | **Anvil International**

**ASSA ABLOY Hospitality** | **Atlas Copco**

**Belden** | **Benefit Mobile** | **Bosch Rexroth**

**BriovaRx** | **Certified Collectibles Group**

**Cox Automotive** | **DealShield** | **Deublin**

**Flexera** | **General Electric (GE)** | **GG+A**

**Grundfos** | **Huron** | **JLL**

**JPW Industries** | **MAVERICK Technologies**

**National Automobile Dealers Association**

**NAVIS** | **RACO Manufacturing** | **SCA**

**Siemens** | **Tempur Sealy (Hospitality)**

**The Vitality Group**

**U.S. Tsubaki Power Transmission**

**vAuto** | **VinSolutions**

**WIN (Wireless Information Networks)**

**Wonderlic** | **Xtime** | **Zekelman Industries**

# TOP B2B AGENCY

- Ad Age



100+

Full-time Employees



Best Places to Work in Illinois 2017  
A workplace analysis and competition

4<sup>TH</sup>

consecutive year

