



Callbox Aced Appointment Setting for Accounting Expert

THE CLIENT



INDUSTRY

Accounting and Bookkeeping



LOCATION

AU & NZ



HEADQUARTERS

AU

ABOUT

The Client bears unmatched experience in providing redefined Accounting, Bookkeeping and Self-Managed Super Funds (SMSF) to its partner clients, addressing specific pain points of modern accounting practice.



CAMPAIGN TYPE

Appointment Setting



TARGET LOCATION

AU, NZ, SG & MY



TARGET INDUSTRY

Accounting and Bookkeeping Firms

TARGET PROSPECTS

- Owners
- Managing Directors

THE CHALLENGE

The accounting expert serves as an integral extension of its clients, ensuring all tasks are accurately completed. However recently, competition became fierce as competitors started to offer equally interesting services and even used enticing branding images which made the Client indistinguishable from its industry peers.

The Client decided on offering a FREE-TRIAL to target customers. Well aware that this required expertise in pursuing prospects and getting them to agree to meet with the Client's consultants to discuss signing up for the free trial, the Client searched for an appointment setting company that best fit their needs and chose Callbox.

HIGHLIGHTS

- Validated and updated contact details via Customer Profiling campaign.
- Filtered active contacts and identified the most appointment-ready key-prospects and those who were interested to discuss, via the Pipeline Lead Nurture Tool
- Reached and spoke with prospects at their most convenient time via Callbox's SMART Calling system

RESULTS WITHIN TWELVE WEEKS



39 Appointments Set



747 Verified/Updated Contacts



21 Warm Follow-ups (after the campaign)

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THE CALLBOX SOLUTION



Customer Profiling

Callbox ran a Customer Profiling campaign along with Appointment Setting to update the Client's database and to build a new set of qualified prospects.

1. An initial email copy which contained news releases about the Client's FREE TRIAL offer were sent to target customers.
2. Active emails from prospects who responded, clicked links and visited the Client's company website were saved for follow-up calls.
3. Responses also gave the Callbox team the opportunity to filter the most available prospects to touch base with via the CTA link (scheduling option) in the email copies.
4. Bounces were filtered and saved for follow-up calls for the agents to update as they speak with the prospect.



Appointment Setting

Aside from targeting to gain a new set of clients, the Appointment Setting program aimed to exhibit a differentiated service by giving their customers a first-hand experience of the service.

1. With the help of the Pipeline Lead Nurture Tool, the team was able to profile the contacts in the database: information like contact name, address, contact numbers and email address were updated.
2. Initial email copies with replies were set for follow-up call - appointments were set for prospects who agreed not only to the FREE TRIAL but also for those who were merely interested to discuss about the Client's services.
3. To ensure that appointments were not missed, the Callbox team sent calendar invites to prospects to remind them of their appointment schedule.
4. And with Callbox's SMART Calling system, a hefty number of prospects was reached by the Callbox team to speak with the Client's specialists and agreed to a FREE TRIAL.

RESULTS AND RETURN ON INVESTMENT

The first four weeks were the busiest days of the campaign period as the Callbox team was juggling between getting together a fitting list of contacts to profile and setting appointments with those contacts at the same time, but successfully delivered 11 solid appointments.

Between the 5th and 8th weeks, with the Callbox team effectively done with the initial calls, follow-up calls came out more productive as most of the prospects the team spoke with were already knowledgeable of the free trial and have learned of the service's

benefits from other prospects via testimonial videos linked through the follow-up emails. This phase of the campaign generated 13 more appointments for the accounting expert.

The last 4 weeks (9th to 12th) had the Callbox team equally busy but more delighted as follow-ups that were nurtured during the start of the campaign eventually converted into appointments and impressed the Client with 15 appointments at the closing.

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