



**CASE STUDY**

**DOOR-TO-DOOR SALES CYCLE ACCELERATED  
FROM DAYS TO MINUTES**

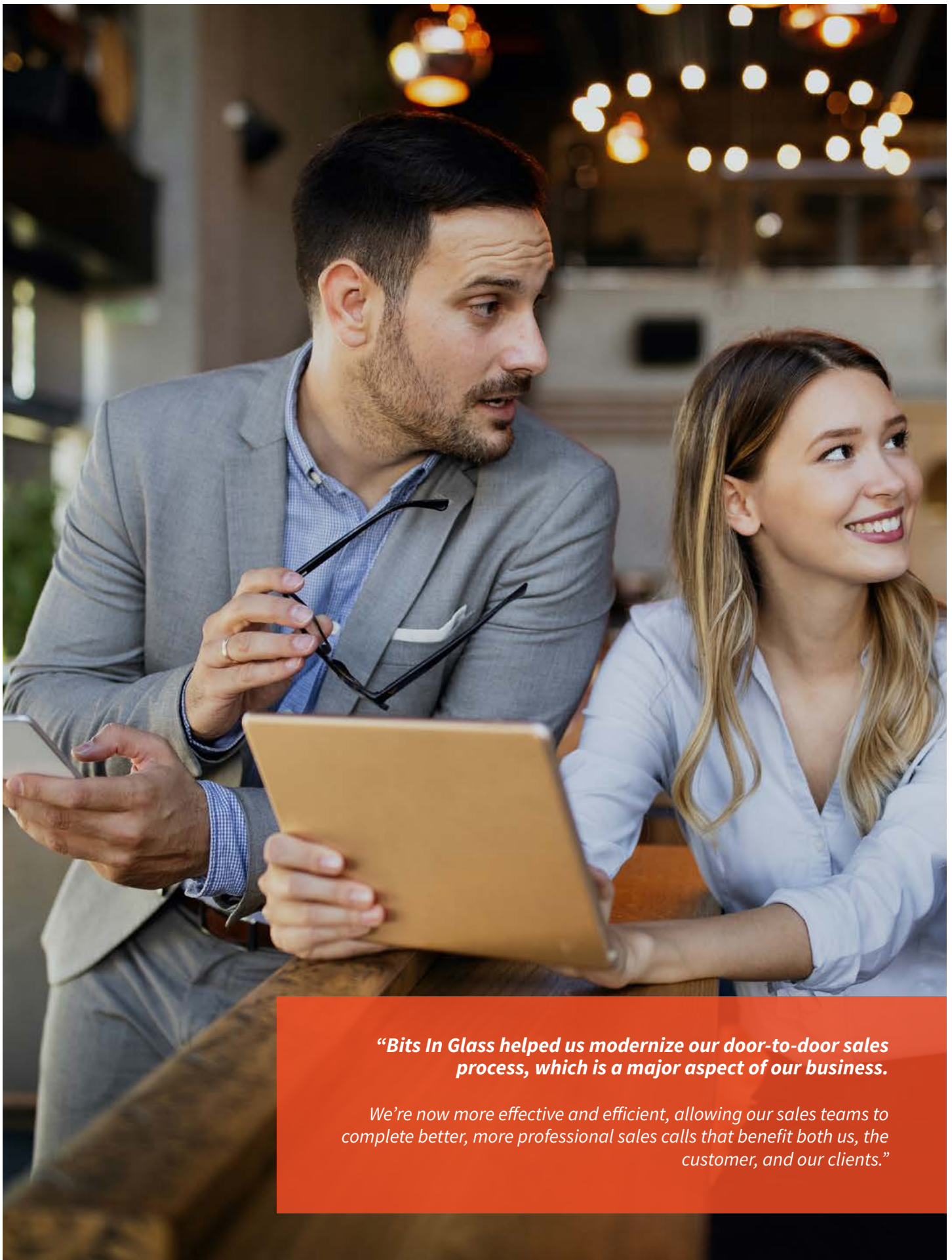
## BACKGROUND

# about the client

Founded in 1994, this company specializes in sales and customer acquisition, managing the delivery of sales and marketing services for Fortune 500 and emerging companies through a combination of professional in-person sales, call center solutions, and digital marketing services for clients across the United States and Canada.

When a service provider like Verizon, as an example, wants to run a door-to-door sales campaign to try and get customers to either sign-up or switch from their current internet and TV provider over to Verizon, they might hire this company to run the campaign for them. The company's sales reps will then go door-to-door on behalf of Verizon trying to gain new customers.

Over the past 25+ years, the company has grown its network from six independently owned sales companies to more than 375, providing clients access to nearly 4,000 sales professionals.



***“Bits In Glass helped us modernize our door-to-door sales process, which is a major aspect of our business.***

*We’re now more effective and efficient, allowing our sales teams to complete better, more professional sales calls that benefit both us, the customer, and our clients.”*

# RESULTS



## FROM DAYS TO MINUTES

### FASTER SALES CYCLE

Accelerated the company's door-to-door sales calls from days to manually complete **to only 20-30 minutes** digitally.



## BETTER FRAUD PREVENTION

### REDUCED RISKS

**Improved the company's fraud prevention** by reducing risks associated with sales reps manually inputting customer and credit card information.



## REAL-TIME ACCESS & INSIGHT

### IMPROVED REPORTING

Created a more streamlined and integrated sales process with improved reporting capabilities and better access and insight into **real-time sales data**.



## CHALLENGES

# MANUAL SALES TACTICS

For years, the company managed the execution of door-to-door sales campaigns manually. Sales reps used offline tablets to collect information from potential customers at their homes and then manually enter the data into the company's enrollment system when they got back to the office. This was an inefficient use of sales rep's time and came with risks like incorrectly entering customer contact information and manually processing payments.

A few years ago, the company implemented Salesforce to fix this problem. As a customer relationship management (CRM) platform, they used Salesforce to build a custom application for sales reps to input and update customer information into their tablets in real-time, eliminating duplication of work and reducing manual data entry risks. And we call this the 'customer enrollment app'.

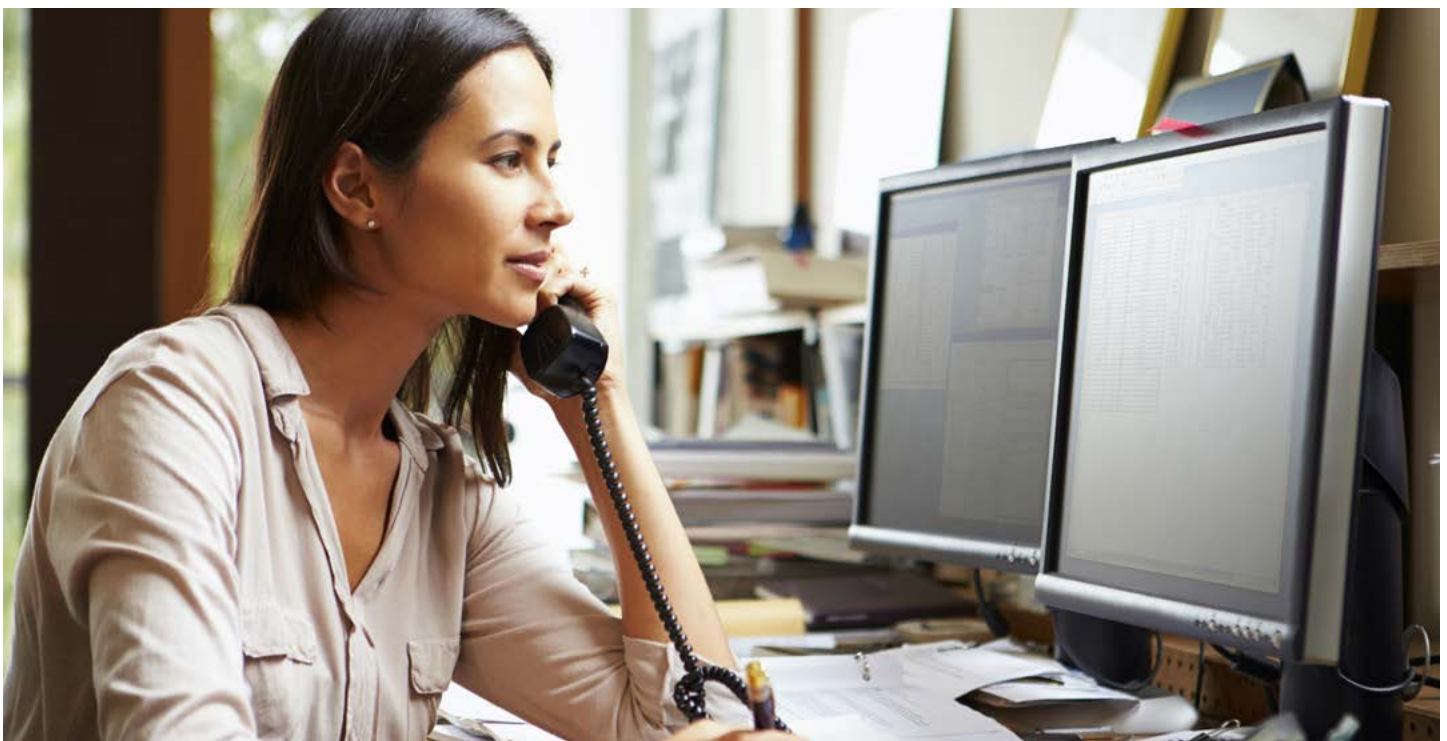
Fast forward to now, when the company realized it needed to streamline its door-to-door sales process even more. Why? Sales reps still had to call the service provider (Verizon again, for example) to determine the customer's eligibility for service, based on their address (not all communities are set-up to receive fiber-optic internet, for example.) So sales reps would have to pause

the conversation to find out this information, which they weren't always able to get in real-time.

Plus, sales reps also had to return to the office to complete the sale, manually booking the customer's service appointment and inputting their credit card information for payment. They had to do this because the company's tablets weren't integrated with the required systems to complete these final steps of the sales cycle while at a customer's house.

To solve this, the company was looking to integrate the customer enrollment app with the systems its service providers use, so sales reps can check customer eligibility and book service appointments in real-time. Instead of pausing the conversation to call Verizon and ask if the customer is eligible, and then calling back again later to book their service appointment, they wanted to enable the app to do this all in real-time on the tablet.

Lastly, to complete the final step of the sales process, the company needed the app to also integrate with its third-party credit card system so sales reps can process customer payments in real-time.



## SOLUTIONS

# STREAMLINED SALES PROCESS

The company chose MuleSoft to integrate its Salesforce customer enrollment application to its service providers, and Bits In Glass was brought on to complete the implementation as a trusted and award-winning MuleSoft partner.

Using an API-led approach, we built connectors to enable the company to integrate its customer enrollment app to various service providers and third-party systems.

Now, when a sales rep is completing a door-to-door sales call, they simply enter the customer's address into the app and are instantly notified what services they are eligible for.

By integrating with the service provider's system (Verizon, for example), they can also see what packages, upgrades, or other offers are available to the customer, increasing the personalized value of the sales call.

But wait, there's more! The service provider integration also allows the sales rep to book the customer's service appointment at the same time, streamlining and accelerating the sales call, and providing the customer with the most value for their time.

Last but certainly not least, we also integrated the app with the company's third-party credit card system, so sales reps can verify and process the customer's payment in real-time. They no longer need to wait until they get back to the office to manually process the sale, reducing data entry and fraud risks.

Overall, what used to take sales reps days to fully complete a sales call, doing some of the work at the customer's home and the rest back at the office, can now be done in minutes from one device.





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