

# FOUR STEPS TO MAXIMIZING INBOUND PHONE LEADS

The key to maximizing customer engagement is to reduce customer effort. We cannot answer every customer call and customers do not answer most of our calls to them. Automate lead capture, organize a shark tank for lead follow-up, protect your phone lines from getting flagged as SPAM, and assist your agents with their customer engagement and increase engagement up to 30%

## Compare your best practices with the big boys

01

### Get Smart About Automatic Lead Capture

- Automatically route Spanish calls away from the main queue
- Know with 100% accuracy which calls are MISSED, and which Agents took *which* calls
- Employ a Digital Assistant to handle missed calls, capture key customer information, and schedule callbacks and texts with an Agent


02

### Establish a Shark Tank for Missed Leads

- Ensure only certified Agents can claim and reengage missed leads
- Automate workflows to engage your missed leads 10x over the course of the initial three days through email, phone, and video
- Automate your 14-day follow-up period for missed leads using "self-deprecating" templates


03

### Protect Phone Lines from being Marked "SPAM"

- Register all outbound phone numbers used in office, through CRM and mobile phones to ensure they are not flagged as SPAM
- Label your phone numbers to show your business name or Agent name
- Text enable all phone numbers used for outbound calling

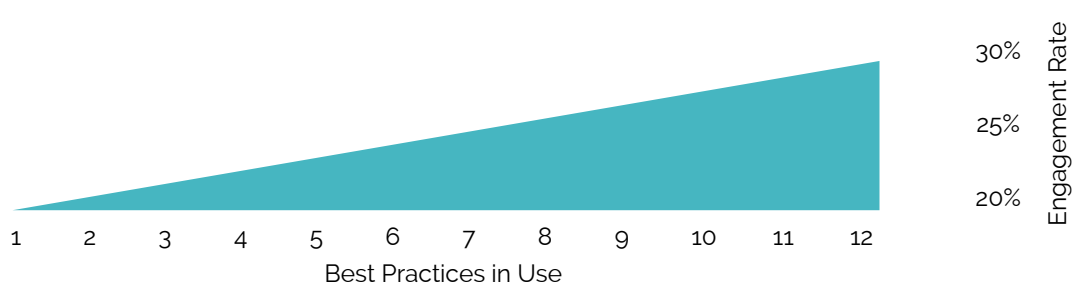
  
  


04

### Use Technology to Aid Agent / Customer Engagement

- Enable "Verify Me" videos and links to be sent to the customer during the phone call
- Use AI to play "Credit Pull Reminder" to Agents when the time is right, and report on Credit Pull Requests on *every* call
- Automate Lead Disposition:
  - Engaged customers | Credit Improvement | Unengaged -



All of the above best practices can be implemented with your current staff, CRM and voice solutions. If you want to learn more about a best practice or more, contact us. We will be happy to share the details behind each improvement practice.

- Michael Markette

