



Case Study: Increasing Call Center Sales

Project

A company that sells protective covers for boats, RVs, and golf carts wanted to help its customer service representatives (CSRs) convert a higher percentage of phone inquiries into sales. The current conversion rate was 33% and the company hoped to increase this to 35% or higher.

Approach

A needs analysis revealed several obstacles to converting inquiries into sales.

- Staffing levels didn't match typical call volume patterns, so CSRs were rushed to get customers off of the phone during peak times.
- The company paid new CSRs well below the market rate for this position, so they had a difficult time attracting talented candidates for open positions.
- CSRs had good product knowledge, but didn't know how to build rapport with customers and uncover their needs.

We addressed these obstacles with a multi-faceted strategy:

- A new schedule was created to ensure adequate phone coverage for anticipated spikes in call volume.
- The starting salary for new CSRs was increased, which resulted in a much stronger pool of candidates. During the project, the client hired a new CSR who had outstanding experience and immediately made an impact.
- A job aid was designed to help CSRs ask appropriate questions to uncover customer needs and match those needs with the features and benefits of the most appropriate products.
- The CSRs participated in a short training session to learn how to develop better rapport with customers and use the job aid to convert more inquiries into sales.
- The team established a monthly meeting to review sales performance, share best practices, and set a shared sales goal for the coming month.

Results

After 30 days, the CSRs had increased their closing ratio to 45%. This was an increase of 12 percentage points over their 33% closing ratio at the start of the project.