

BAMBOOHR MAKES THE SWITCH TO EMPOWER SDRS AND IMPROVE PRODUCTIVITY



INDUSTRY

- SMB market

PROFILE

- Founded in 2008
- Lindon, UT
- Award winning HR software for small and medium-sized businesses

CHALLENGES

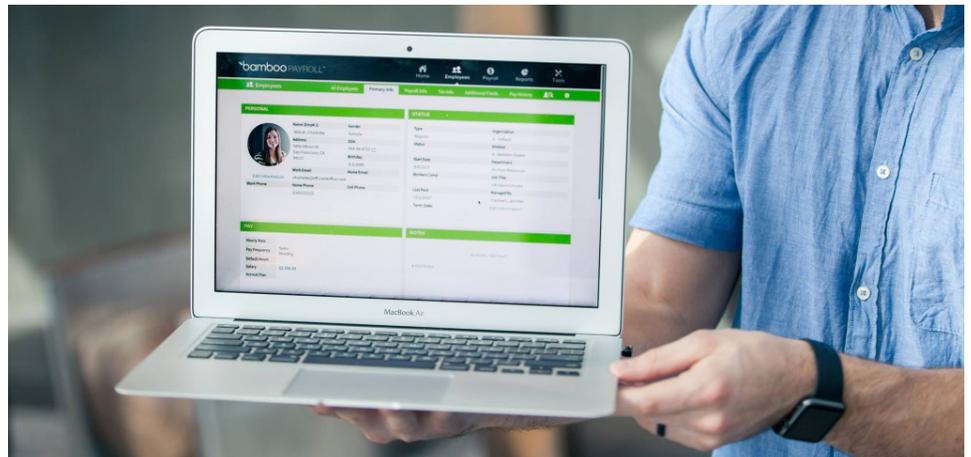
- Difficulty responding to new leads quickly
- Needed a better way to filter out the noise and prioritize
- Salesforce syncing issues on previous solution
- Poor call quality on previous dialer
- No transparency for SDRs into their daily priorities
- Transfer hold times of five mins or more
- No easy way to redistribute unworked leads

SOLUTION

- Velocify Pulse®
- Velocify Dial-IQ®
- Salesforce
- ActOn

RESULTS

- 85 percent of new leads called in under five minutes
- Transfer hold times are now less than one minute down from five minutes
- Productivity has gone up significantly
- Doubled size of SDR team



BUSINESS CHALLENGES

BambooHR specializes in HR solutions for small and medium-sized businesses (SMB) that have outgrown spreadsheets for managing employee information. The market opportunity is abundant for SMB HR solutions, so for BambooHR it is all about prioritizing and focusing their sales team's time.

"When selling into this type of market it is all about timing," noted Zak Bills, a sales development rep (SDR) at BambooHR. "If a growing business is still using Excel for its HR needs, BambooHR is a good fit. We just need to get in front of them."

While BambooHR was sitting on a vast amount of opportunity, their inside sales solution was holding them back. The solution failed to sync properly with Salesforce causing leads to fall through the cracks, and forced sales leadership to constantly audit lead flow. In addition, the call quality of their previous inside sales dialer was so bad that SDRs were talking over prospects due to a common two second delay.

"Our SDRs were spending 20 mins or more every day trouble shooting basic dialer functionality," said Drew Dooley, the Salesforce admin at BambooHR. "We wanted a solution that was natively integrated with Salesforce to eliminate the extensive amount of time waste."

SOLUTION

FILTERING OUT THE NOISE

Given the large amount of leads BambooHR's marketing team was generating, there was a need to prioritize and focus the sales team's time.

"Our marketing team was going really wide with the nets they were casting for leads," noted Drew. "We wanted a way to get the cream of the crop out of our leads and help our sales reps focus on who to contact first."

With Velocify Pulse™ priority rules, BambooHR is able to ensure the highest value leads are contacted quickly. By pairing Velocify Pulse with lead scoring from their marketing automation tool, ActOn, they are able ensure the best opportunities are always at the top of their reps pipeline. As a result of working smarter, 85% of new leads are now called in under five minutes.

QUALITY OVER QUANTITY

With BambooHR's previous inside sales system it was just dial, dial, dial. As BambooHR planned to double the size of their SDR team in the coming months, it was critical to find a solution that would help these new hires generate more quality interactions with prospects. With Velocify Pulse, they found the sales activity cadence much more thoughtful.

"Before Velocify, our reps were hardly sending any emails," said Dooley. "Now with Velocify's workflow rules our SDRs take a more thoughtful approach – they'll make a second call attempt and then follow up with a personalized email using a top performing template."

Sales development reps are also able to bucket similar activities – allowing them to work through leads a lot more efficiently.

"As a rep I like to group sales activities," said Bills. "With Velocify, higher priority leads like free trial and pricing inquiries are grouped and always at the top of my queue."

NO MORE LEADS FALLING THROUGH THE CRACKS

One of the biggest issues with BambooHR's previous inside sales solution was the one dummy account where all leads were owned until contact was made.

"All our SDRs would have to dial out of this one list and weren't assigned the lead until contact was made," said Dooley. "The SDRs hated it because they couldn't personalize anything and they didn't feel a sense of ownership over the lead."

With Velocify Pulse the rep owns the lead from the beginning. All emails are personalized and go out with the reps name on it, noted Drew.

"I had no confidence in our previous inside sales solution, I never knew if I'd get a lead back or if it would go to another rep," said Bills. "With Velocify I know all my leads will come back into my queue when I need to call them again."

"Velocify Pulse is natively integrated with Salesforce, which pulls everything together and eliminates an extensive amount of time wasted."

Drew Dooley, Salesforce Admin, BambooHR

DISTRIBUTION AND TRANSFER CAPABILITIES INCREASE PRODUCTIVITY

Prior to Velocify Pulse, when a SDR wanted to transfer a prospect to an account executive (AE) they had to go through Outlook to find an available rep and then patch the rep into the call.

To modernize their process, BambooHR recently started using the distribution functionality available in Velocify's call transfer solution. This small change has dramatically decreased hold times, bringing them down from five minutes to less than one minute.

Now with Velocify Pulse, SDRs are able to initiate a Shotgun Connect distribution program to ping all eligible and available AEs. When the AE wins the Shotgun the SDR can bring the AE into the call or transfer it completely.

COMPANY OVERVIEW - BAMBOOHR.COM

BambooHR is the leading provider of tools that power the strategic evolution of HR in small and medium businesses. BambooHR's cloud-based system is an intuitive, affordable way for growing companies to track and manage essential employee information in a personalized Human Resources Information System (HRIS). Now HR managers have more time for meaningful work, executives get accurate, timely reports and employees can self-service their time off using a convenient mobile app.



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Additional Case Studies can be found at www.velocify.com

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