

## PRINCE LAW DOUBLES DAILY DEAL VOLUME WITH VELOCIFY PULSE

Increases call volume and contact rates



### INDUSTRY

- Legal Services

### PROFILE

- Based in Plantation, FL
- National consumer bankruptcy law firm
- Bankruptcy, debt collection, and creditor harassment services

### CHALLENGES

- Slow response to consumer inquiries
- Enrollment reps ignoring certain leads
- Staying on top of important daily activities
- Missed follow-ups and prolonged processing time

### SOLUTION

- Velocify Pulse™, including integrated dialer, Dial-IQ™

### BENEFITS

- Doubled the number of closed deals on a daily basis
- Dramatically improved contact rates
- Improved customer experience through consistent follow-up practices
- Gained greater visibility into daily sales performance



### BUSINESS CHALLENGE

With U.S. consumers' rising debt challenges, Prince Law was looking to establish the firm as an essential legal source for debt relief in an unstable economy. Armed with a team of seasoned paralegals and in-house counsel, the firm turned to Salesforce® to establish a platform for managing the heavy demand for their consumer bankruptcy management services. The solution had an immediate impact, but the management team quickly realized Salesforce Sales Cloud® alone could not accommodate the complex lead management and sales process needs of the firm.

One challenge Prince Law faced was when leads from certain lead sources came in, enrollment representatives would “cherry pick” what they perceived to be higher quality leads, resulting in slower response to all inquiries. And even though the reps were able to eventually respond to a majority of the leads coming in, they could not accurately distinguish higher priority leads from lower priority ones.

In addition, David Prince, Co-Founder and Managing Partner, sought to reward higher performing reps with a higher quality and quantity of leads, but with only the round robin distribution method available, he couldn't accomplish this easily. The firm's hours of operations further exasperated their lead distribution challenges. In order to be open and available from 9am to 9pm ET, the firm utilized multiple shifts throughout each work day and there was no easy way to route leads only to reps who were on-shift and available.

Lastly, because of Prince Law's team approach to selling leads often need to be handed off to multiple people, based on the outcomes of discussions taking place, throughout the sales cycle.

“Prior to Velocify Pulse, we were closing about 8-10 deals per day. Now we are closing 15-25 deals per day. We have seen a massive increase in deal volume since implementing Velocify Pulse!”

**Bryan Anderson COO, Prince Law**

## SOLUTION

Prince Law needed a solution that could facilitate their desired process in a systematic, error-free, time-saving way. The firm turned to the Salesforce AppExchange® in hopes of locating an integrated solution that could support its specific lead management and sales automation needs. Prince Law evaluated four solution providers on the AppExchange, but after an extensive evaluation determined Velocify Pulse was the only solution that could deliver on their unique requirements. When making the selection, the ability to support very complex lead distribution options along with its guided SalesFlow™, centralized PriorityGuide™, integrated Dial-IQ feature, and ActivityInsights™ were cited as key factors when selecting Velocify Pulse.

## GETTING THE RIGHT LEAD TO THE RIGHT REP AT THE RIGHT TIME

With an aggressive plan for expanding the number of enrollment reps responding to the increasing volume of leads generated through the Prince Law website, and inbound calls, Prince Law needed an advanced, yet flexible lead distribution solution.

“Adding Velocify has allowed us to send leads to reps based on their performance with a particular type of lead and based on specific lead attributes,” said Bryan Anderson, COO of Prince Law. “The system automatically distributes higher or lower volumes of leads to our enrollment reps at different time intervals to accommodate our varying work schedules throughout each day.”

If leads sit idle for too long in reps’ priority queues, the system automatically redistributes the leads to the next appropriate rep via the ReMatch™ feature, this ensures immediate follow up. Having the level of lead distribution flexibility that Velocify delivers ensures more rapid lead response and significantly higher contact rates. “On average, our reps were working between 15-20 leads per day, prior to Velocify Pulse,” said Bryan. “Now, that volume has almost tripled. With Velocify

Pulse, it is common for the team to be working 65-100 leads per rep per day. We are seeing a huge increase in call volume and contact rates as a result.”

## KEEPING REPS ON A PREDICTABLE PATH TO REVENUE

Prince Law was extremely pleased with the ability to map out its complex sales process in the system without having to rely heavily on IT resources or external consulting services. “Working with the Velocify professional services team and the guided SalesFlow established in the system, we were able to map out every ideal selling scenario and get all reps up and selling in a very short amount of time,” said Bryan. Velocify Pulse allows Prince Law to implement a proven contact strategy and consistent sales processes that determine key actions to take at each stage of the sales cycle.

Reps work from one central priority view ensuring new leads and leads in early stages of a sales cycle are worked diligently. Velocify Pulse can leverage sales stages, certain attributes and behaviors of leads, as well as scheduled tasks to determine prioritization of leads in enrollment reps’ queues. If contact is not made after several attempts, according to Prince Law’s established contact strategy, the lead is automatically placed in a nurture status for the system to drip out email messages for three more months. If there is response during this time, the lead moves back into Velocify Pulse and is re-distributed according to the SalesFlow established.

Another key element of their SalesFlow is Prince Law’s utilization of a team-based selling approach. Once an enrollment rep determines a consumer may be a viable candidate for bankruptcy services, the rep chooses from a pre-defined list of actions that is based on his/her interaction with the lead, which may include transferring the call to in-house counsel for further evaluation. Once counsel receives the lead and speaks with the consumer, if they determine the lead is qualified, they then take a new, pre-determined action to qualify the lead in the system and transfer the consumer back to the enrollment rep to close the deal. For new clients, a retainer agreement is prepared and sent via DocuSign through Velocify Pulse. The rep then selects services for the client, creates a payment schedule, and creates a welcome call task for client services. Once a payment plan is created the lead is converted to an opportunity. Driven by Velocify’s PriorityGuide, when attention is needed on an opportunity, it automatically appears in the enrollment reps’ PriorityView™, reducing processing time.

## GREATER CALL VOLUME

Prince Law also takes advantage of the Velocify Pulse optional integrated dialer feature, Dial-IQ, which includes pre-defined

actions within the Dial-IQ display panel. Once a phone number is selected on the screen within Salesforce, Dial-IQ initiates dialing to the individual selected, saving time and enabling greater productivity. If the call goes to voicemail, the rep can choose to leave a standard pre-recorded voicemail then utilize the time-saving Next Call button on the screen, automatically calling the next prioritized lead in their call queue.

Velocify also provides Prince Law with ActivityInsights that offer a granular view of sales performance. Leveraging these insights, Prince Law is able to quickly determine areas where coaching is needed and which lead sources are providing better yield. If performance is consistently low from a particular lead source, management can immediately reduce investment in that source and re-allocate dollars to higher quality sources.



“Adding Velocify Pulse has helped us dramatically improve our call volume, deal volume, and conversion rates, while optimizing our marketing spend.”

Bryan Anderson COO, Prince Law

#### COMPANY OVERVIEW

Prince Law is a national consumer law firm with licensed attorneys in all 50 states and Puerto Rico. The firm provides legal representation for individuals in need of assistance with credit and debt related issues.



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