



Performance Sales and Marketing

Advisor

Improving Lead Quality For Home Services

Published August 2018

Background

Lead generation in the Home Services industry is a constant push and pull between incoming volume and quality volume.

A Home Services company, which is made up of company owned and franchised locations, was struggling with the quality of the leads that they were paying for.

They were utilizing well known lead generation companies, yet the process seemed not to bring forth profitable jobs.

The current process was that they would receive leads electronically in the form of an email to their call center and from there, a call center agent was assigned the lead to outbound call the customer to schedule an appointment for an onsite visit.

The incoming lead volume was great, but the lead-to-booked appointment conversion was very low.

Issue

The key issue with the current process is that the lead that the Home Services company received was not exclusive so that meant that at least 3 other companies received the very same lead at the very same time.

This created a jump ball environment where the first company to reach the customer usually booked the appointment.

As well, with the many call screening features that most customers set up, the outbound call success rate was low in getting a customer to answer the phone. Even though the customer inputs their phone number on the lead request, a generic 800# does not get answered.

The Home Services had a policy of trying to reach a customer 3 times before they discard the lead received. This is a huge burden on resources because they are focused on trying to reach a customer vs speaking with a live customer.

Approach

In order to define a viable solution, we needed to understand what the trend was or common profile of a successfully booked appointment.

During our research we identified that having a live customer on the phone was about 90% successful in booking an appointment. At first glance, it appeared that this was only for the customers who called in themselves vs being called by company.

As we dug deeper, it became evident that while inbound calls from customers did have a higher conversion rate, it was not by much. The common profile was having a customer on the phone, that was the foundation.

From there, we worked with the different lead generation partners that the Home Services company was currently utilizing to better understand their lead generation process and how they approach the market to gain customer inquiries and requests.

Solution

The solution became evident quickly, we needed to implement a live transfer process for leads with each of the lead generation companies.

We selected a few of the lead generation companies that were willing to do a live transfer with the Home Services company so that we can isolate those leads and measure the quality and conversion ratio.

The KPIs that we measured:

1. Volume of live transfers received
2. Percentage of booked appointments from live transfers
3. Call quality of the live transfer

Results

The solution proved successful and increased both the quality of the leads and the conversion rates.

1. Increased lead-to-booked appointment ratio by 30%
2. Increased booked appointment-to-job ratio by 10%
3. Terminated a few lead generation partners that did not offer live transfer functionality
4. Call center agents were focused on speaking with live customers vs spending time trying to reach a customer

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Philip founded PSM Advisor with the vision to create a new management consulting model that operates lean and takes a swat team approach by leveraging a network of specialized firms and consultants.

Philip has 20 years of experience delivering mission critical projects in various industries such as Retail Energy, Oil & Gas, Financial Services, Telecommunications, Environmental Services, Home Services and Retail Loyalty.

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