



callbox

# Giant Software Solutions Provider Improves Lead Capture and Conversion with Callbox



## The Client

The Client is a world-leading provider of 3D and Product Lifecycle Management (PLM) software solutions with more than 130,000 customers in 80 countries. It offers a wide range of 3D virtual solutions enabling businesses of every size to digitize innovative ideas and enjoy lifelike experiences with future products and environments.

The global company has offices in the USA, Europe, the Middle East, Africa, and Asia-Pacific, with partners from leading industries and sectors including Aerospace and Defense, Automotive and Transportation, Construction, Agriculture, Education, Healthcare, and others.

## The Challenge

Prior to engaging Callbox, the Client hired a prominent direct marketing solutions provider to handle its lead generation program. Not satisfied with the results, it sought better marketing. The Client's Singapore office decided to investigate a lead generation program with Callbox.

The Client's main objectives were:

- Determine the level of sophistication of the target's present CAD software tools and systems
- Profile companies and prospects who were already using the Client's CAD solutions
- Facilitate lead reassignment to the Client's resellers

The client judged Callbox's strategies to be more cost-effective and efficient and signed up for a three-month pilot project.

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## The Callbox Solution

The initial campaign started on November 22, 2010 with two full-time Callbox agents. It was divided into three segments: Lead generation, Appointment Setting, and Call-to-Invite.

### *Appointment Setting*

Callbox secured agreement from prospects to be contacted by the Client's reseller.

### *Lead Generation*

Callbox looked for prospects who requested additional information regarding the Client's products and agreed to receive email information on special promos.

### *Call-to-Invite*

Callbox looked for prospects to register for a virtual conference organized by the Client.

Callbox created two customized Pipeline CRM accounts for generating and rechanneling leads to the Client's authorized resellers. Since the Client delivered the call lists on a daily basis, sustainability and integrity of records were a major challenge. To solve this, Callbox used Pipeline CRM and a customized spreadsheet to monitor the Client's data more effectively – an activity which involved close coordination between the Research and Campaign Specialists.

While this campaign focused on generating leads from the warm lists, Callbox suggested tapping prospects on the cold lists producing substantial positive results from this source. Guidelines for the callout process were made visible to each Callbox Team member to ensure that they were updated with the Client's instructions.

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