

Case Study

Solar Energy Company

CUSTOMER PROFILE

Residential solar storage and energy services.

NICE CXone SOLUTIONS

- CXone Omnichannel Routing
- CXone Personal Connection
- CXone APIs
- CXone Agent for Salesforce®

RESULTS ACHIEVED

- Increased sales closing rate
- Improved customer experience
- Reduced call handle time
- Eliminated misrouted calls
- Reduced call abandonment rate

ON THE NICE SOLUTION

“By using CXone to optimize our pre-qualification processes for sales leads, we reduced handle time, gained efficiencies and increased our sales rate.”

Manager of call center technology
For a residential solar energy company

Solar Energy Company Transforms Inside Sales Closing Rate with CXone and Salesforce

ABOUT

The nation's largest residential solar storage and energy services company provides clean energy to homeowners with little to no upfront cost and at a significant savings over electricity. The company designs, installs, finances, insures, monitors and maintains the systems; customers get predictable pricing for 20+ years and a product guarantee.

The company's contact center has approximately 400 agents who handle over 10 million interactions annually. It is positioned to hit \$1 billion in revenue in 2019.

Case Study

THE CHALLENGE

The solar company's field sales team had a higher rate of closing leads than inside sales, largely because as experts in their specific geographical areas, field reps had an understanding of recent changes in utility laws and in-depth knowledge of the communities they served.

Inside sales reps, on the other hand, worked with leads from all over the country: Not being local was a distinct disadvantage. These reps needed tools that would give them the same kind of local knowledge and rapport with prospects, even though they were often states away.

Additionally, much of the inside sales process was manual. A prospect was qualified in Salesforce, then the lead was converted manually to an opportunity. The prequalification rep would then search through skills to find one corresponding to the state where the prospect was located. Ultimately, leads were "warm transferred" to sales to close.

The whole process was labor intensive and error prone. The company hoped that automating it would reduce handle time, improve accuracy and efficiency, and increase sales conversions rates, while eliminating customer disconnects.

THE SOLUTION

The company set out to fully automate the inside sales process with a click of a button, which was easier said than done. But with the help of its Salesforce CRM team, Studio framework actions and CXone APIs, the company fulfilled its objectives—and more.

The collaboration resulted in a process that not only streamlined the entire inside sales process but also armed the reps with valuable metro-market knowledge.

With the new process, prequal reps no longer need to convert the lead, place the customer on hold, and search for the skill that corresponds to the customer's metro market. Instead, sales reps

receive calls with a screen pop of the opportunity. Customers are now left in the hands of sales reps to do what they do best—educate customers and close the sale.

Using CXone APIs to integrate with Salesforce, unique information about each lead is captured and used to determine which sales representative should receive the lead. Leads are automatically assigned to the correct sales representative in the appropriate geographic region, which has increased the sales team's closing rate.

“By utilizing CRM integrations, Studio framework actions and CXone APIs, we improved our business processes and KPIs, while creating a team-building experience where all members exercise their individual strengths.”

Manager of call center technology for a residential solar energy company

OPPORTUNITIES IDENTIFIED

With the new process, the prequal reps do far less manual work to transfer leads and do not have to search a list of skills to find the right region—that's done automatically. As a result, average handle time and call disconnects have been reduced, and customer wait times are much shorter. Transferring leads is more accurate, too, not to mention smoother and faster, which creates a better customer experience.

The company has also realized additional benefits, including reductions in handle time and customer disconnects. This has led to quicker and more successful transfers, which in turn, has increased one-call closes and ultimately, the overall close rate.

Transforming inside sales has meant restructuring business processes and training reps to be experts in their assigned regions by understanding local laws, utilities and communities rather than relying strictly on general knowledge. The company created skills specific to the regional metro

markets and uses them to route customers accordingly. Cutting out the manual conversion process has also alleviated the risk of assignment errors with callers.

Revamping the inside sales process has improved performance metrics and sales while boosting camaraderie and pride among the staff. By utilizing CRM integrations, Studio framework actions and CXone APIs, the company improved its business processes and KPIs with what evolved into a team-building experience that leveraged individual strengths to bring an idea to full fruition.

The solar company values its partnership with NICE CXone and relies on its many expert resources, including knowledgeable Technical Account Managers (TAMs). If the company needs assistance, its TAM quickly connects it with subject matter experts and professional services any time of the day. Company representatives appreciate that NICE CXone truly cares and is invested in its success.

About NICE

With NICE (Nasdaq: NICE), it's never been easier for organizations of all sizes around the globe to create extraordinary customer experiences while meeting key business metrics. Featuring the world's #1 cloud native customer experience platform, CXone, NICE is a worldwide leader in AI-powered self-service and agent-assisted CX software for the contact center—and beyond. Over 25,000 organizations in more than 150 countries, including over 85 of the Fortune 100 companies, partner with NICE to transform—and elevate—every customer interaction.

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