



Finance Sales Case Study

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OUR FINANCE EXPERIENCE

Our management team have worked on a wide variety of campaigns over the last 18 years with some outstanding results. You can be sure when you partner with OneChat that **we know Sales and finance**

Our client is an award winning and emerging player in the fintech space. OneChat was contracted to provide an outbound direct sales team for a customer acquisition campaign, selling our clients suite of financial products and services, as well as cross selling to their existing customer base..

SITUATION

Working with our client we designed a sales strategy that included script design in line with financial compliance requirements, along with a conversational sales approach.

From the data provided our team profiled the propensity to purchase and designed a dialling strategy to suit for maximum return on investment for our client. OneChat designed a tailored training program and facilitated a dedicated sales team. The results were outstanding.

SOLUTION

Due to the success of our approach, the team has grown by 300% for the duration of the initial campaign.

Consultants utilised their acquired skills to speak directly with key decision makers in our clients required targets. Due to our approach the **clients sales targets were exceeded by 84%**.

As part of our continuous improvement strategy, we conducted data investigation and provided recommendations to our client on future EDM design, sales strategy and ongoing campaign improvement.

Due to our success our client has now engaged phase 2 of this campaign which will include larger lead volumes and eCommerce management to assist in growing sales via their online channels.

OUTCOME

84%+
EXCEEDED CLIENTS
SALES TARGET

YOU'RE PRETTY IMPRESSED...WHAT'S NEXT ?

Scott Allan- Director of Sales & Partnerships answers the question **“Why OneChat?”**



OneChat is acutely aware of and has experience in providing the right solutions in a timely and cost effective manner. Our overriding goal is to add value to our partners organisation and more importantly your customers through value added solutions that enhance the customer experience and provide positive ROI to your business.

Scott Allan, Director of Sales & Partnerships

OneChat will use our expertise to provide you with the outcomes that you and your customers desire.

If you would like to learn how OneChat can take your business customer contact to the next level, feel free to get in touch via my details below.

Regards

Scott Allan

Director of Sales & Partnerships

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