



RingCentral API Integration Boosts Productivity for OppSource Software for Sales Lead-Generation Teams Users

Company profile

OppSource is the creator of the PursuitPro software for sales development representatives.

Year founded

2009

Size

13 employees (small)

Industry

Technology

Business need

Cost savings

Website

oppsource.com

Headquarters

St. Paul, Minnesota

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—Mark Galloway, President

In business-to-business sales, promising leads tend to be the result of dozens and dozens of phone calls. OppSource was founded on the idea that sales teams could be more effective if they created a specialized role of sales development representative (SDR) to concentrate on prospecting, allowing experienced salespeople to focus on turning opportunities into closed deals.

To make SDRs more productive in a job that requires heavy phone contact, OppSource works with RingCentral. When paired with RingCentral Office® and the RingCentral Platform APIs, OppSource’s PursuitPro cloud software allows representatives to make more calls and handle them more effectively, while OppSource clients get better tools for management and training.

“We always recommend RingCentral as the partner we have the deepest and richest integrations with,” OppSource President Mark Galloway says.

OppSource wasn’t always a software company, even though that was the original intent when he co-founded the firm with two other veteran business-to-business sales and marketing executives in 2008. Galloway had previously worked for Lawson Software and a series of startups involved in analytics, business development services, and B2B marketing. Yet in the midst of the economic crisis that came to be known as the Great Recession, the biggest opportunity he and his partners found was in providing outsourced SDR teams for clients who needed to maximize the effectiveness of their remaining internal sales teams, following layoffs.

The problem

In the early stages of its outsourcing business, OppSource would have SDRs work with whatever Customer Relationship

Management (CRM) platform the client had as its standard. OppSource wanted to give their SDR clients a system that enabled lead follow-up in their moments of interest, and organized their day around the best next leads to pursue. PursuitPro also provides the managers of SDR teams with analytics and supervisory dashboards specific to the lead generation functions.

To stay in sync with the rest of the sales operation, OppSource tightly integrates with Salesforce.com and is currently working on an interface to Microsoft Dynamics CRM. Because SDRs work at the intersection of sales and marketing, OppSource also connects to the APIs of marketing automation platforms such as Eloqua, Marketo, and HubSpot.

As a rule of thumb, it takes 9 or 10 “touchpoints” to turn a prospect into a warm lead ready for follow-up by the sales staff, and one of the functions of PursuitPro is formulating “touch plans” to make it happen. “When you try to do that through Salesforce or some other CRM system, you can’t keep track of the number of touches they’ve made for each of the leads they get,” Galloway says.

SDRs can reach out to prospects through multiple channels, including email, LinkedIn, and other social media, but spend the vast majority of their time on the phone. Therefore, making the time they spend on the phone more effective translates into a major productivity boost.

Despite that, Galloway encounters many organizations who have established SDR teams but have representatives dialing every number manually. “Believe it or not, that’s the expectation very often,” he says.

To be more effective, what SDRs need is a user interface that alerts them to leads who

are interested and need follow-up right away. It also gives them all the information they need about the next prospect on their list, gathered together in one place, plus organized call queues with click-to-call dialing of the number. Also helpful are common call center software features such as call recording and the ability for a supervisor to “whisper in the ear of the representative” or take over the call, if necessary.

At the same time, OppSource needs to help its clients stay on the right side of the law, which can be challenging because the laws governing call recording vary from state to state. In the absence of a good solution, many national firms turn off call recording entirely rather than risk potentially hefty fines for violating the law in states where call recording is prohibited or severely restricted.

“If I’m a sales development representative making 30 to 100 calls a day, I don’t want to have to figure out which calls I record, and which I shouldn’t,” Galloway says. “But when organizations turn that feature off, it inhibits their ability to do training or listen to how representatives are conducting their calls. In the enterprise space, that’s a big deal.”

The solution

OppSource found the best answers to its phone system challenges with RingCentral, the RingCentral for Desktop softphone for automated dialing, and the RingCentral APIs. OppSource does support other cloud phone systems and can even work with customers’ on-premise phone systems—it advertises PursuitPro as “an open system that works with your favorite softphone VOIP phone system to enable click-to dial and autodialing queues that comply with FTC automated dialing regulations.”

Yet Galloway says the range of features customers enjoy if they choose RingCentral is simply greater.

“Take a feature like being able to hot transfer a call,” he says. Sometimes a lead-generation specialist will connect with a prospect who is not only ready to listen but ready to buy, he explains. “In a case like that, you want

to be able to do a hot transfer to a sales representative who can complete the sale. Making that happen in a lot of on-premise phone systems, or in our competitor’s solutions, they can’t do it, but we can with RingCentral.”

The results

OppSource customer SportsEngine, the creator of web and mobile applications for the administration of sports teams, improved the productivity of its SDRs by 300% after adopting the software, according to an OppSource case study. Introducing SportsEngine to RingCentral and providing SDRs with autodialing tools was a significant part of that success story, Galloway says.

OppSource continues to work with the RingCentral platform APIs to introduce further enhancements. One new feature leverages the RingCentral APIs to turn call recording on or off on a call-by-call basis. That allows OppSource developers to define a set of rules that activate or deactivate call recording depending on the laws of the state where a call is being placed.

Another significant upgrade is the ability for SDRs to automatically route calls through RingCentral phone numbers in the same area code as the recipient. Why? Because statistically people are four to five times more likely to answer a call that comes from a local number. “That’s a huge productivity factor,” Galloway says.

Often, clients adopt RingCentral for their SDR teams without necessarily standardizing on it for other parts of the organization, Galloway says, simply because it provides more functionality in this one context. Yet he suspects even some of the large enterprises who have standardized on other technologies will think twice when they see what RingCentral can do.

“If it works well for a high-volume, high-calling part of the organization—if they can make it work for their sales group—that’s a great reference point for rolling it out to other parts of the organization,” Galloway says.

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