

Global Financial Services Leader Boosts Sales and Call Quality Score by 172 Basis Points in 90 Days

AI-Fueled Onboarding Tool Drives Inside Sales Success



WHAT WE DID

Inside Sales

AI-Infused Onboarding
+ Training



INDUSTRY

Financial Services



RESULTS

+172 Basis Point Call Quality
Score Increase in 3 months

New Associates Reached
Compliance and Performance
Benchmarks in 90 Days



Lack of In-House Resources Hindered Rapid Launch of Inside Sales Team Needed to Support Expanding Programs

[SITUATION]

A multinational financial services corporation needed to quickly scale its inside sales team to support its expanding payment card programs but lacked the in-house resources to hire and onboard qualified talent that could rapidly adopt the high quality, compliance, and customer experience standards that define its brand. And any delay or dip in performance could depress customer satisfaction, lead to regulatory fines, and reduce time-to-revenue.

Traditional onboarding methods couldn't accommodate the scale the client needed. Given our existing successful partnership, the client engaged MarketSource to rapidly expand its team and ensure new associates were fully prepared to drive results, meet regulations, and honor the brand from day one.

CHALLENGES

Urgent sales expansion needs

Lack of in-house scaling and Training Resources

Stringent compliance requirements



AI-Fueled Onboarding Tool Enabled Rapid Deployment of Ready-to-Sell Inside Sales Team

[SOLUTION]

Our proprietary, AI-fueled onboarding platform, Super Associate, enabled rapid deployment of a ready-to-sell inside sales team. The machine learning, speech-guided platform that accelerates time-to- and optimizes in-call performance, delivers associates real-time keyword prompts as they engage with customers and maps conversations to the correct phase of the sales process.

Managers updated scripts real-time, ensuring messaging remained consistent and responsive to evolving business needs, stronger customer interactions, and tight alignment with brand standards. The result was seamless, real-time training and a coaching strategy that reduced downtime and ensured consistency across teams and geographies, at scale.

KEYS TO SUCCESS

Rapid scalability

Accelerated associate time-to-performance

AI-powered onboarding of compliant reps

Agility

172

Basis point call
quality score
increase in 90
days.

Real-World Results



+172 Basis Point Call Quality
Score Increase in 3 Months



New Associates Reached
Compliance and Performance
Benchmarks in 90 Days

The client's call quality scores rose by 172-basis points, and new associates' time to performance accelerated to reach targets, all within 90 days.

MarketSource, an Allegis Group company, is a sales acceleration company focused on delivering better outcomes for many of the world's most iconic brands. We design and operationalize managed sales and customer experience solutions in B2B and B2C environments. Our solutions are purpose-built and tech-enabled to deliver measurable improvements in business outcomes.