

Firma Foreign Exchange uses Gamification to Motivate Sales



Industry:
Finance

Size:
200+ Employees

Key Impacts

- Gamification significantly improved employee motivation and process adoption
- Outbound calls increased 25% using click-to-dial

The Summary

Since implementing Upland InGenius, Firma Foreign Exchange has seen the outbound call volume of their business development teams increase by 25%. The team has also improved their business processes through workflow integrations that allow them to track users' activity, award points for completing tasks and reward the use of the most efficient workflows, like Upland InGenius click-to-dial.



The Challenge

After bringing Firma Foreign Exchange Global Offices onto one Salesforce instance, standardizing processes proved to be a challenge. Pattie Heintz, the Salesforce Administrator at Firma, knew the positive impact Salesforce workflows have on a team. This insight led Pattie to introduce a gamification system in Salesforce that used a points dashboard to incentivize employees to operate in the best, most efficient way.

At Firma, the sales teams spend a lot of time making outbound calls and had requested a computer telephony integration [CTI] solution because they knew it would save them significant time daily. With the new Salesforce implementation, Firma needed a CTI provider with the capability to understand how Firma wanted to optimize their outbound calling process by using a specific workflow between the CRM and the telephony switch. The challenge was that the workflow would need to track CTI usage and link the information into Firma's Salesforce points dashboard, as the metric of 'calls placed' is of utmost importance. Firma discovered that Upland InGenius could help them turn this optimization goal into a reality.

“The Salesforce dashboard gives us insight into quality vs. quantity of calls made. It’s great to see Upland InGenius gives us a shortcut to produce results with fewer clicks.”



–Pattie Heintz, Salesforce Administrator
Firma Foreign Exchange

The Background

Established in 1998 in Edmonton Alberta, Firma has grown to become a global company, with locations around the world. At Firma, their Currency Specialists put the world's currencies to work, how you want, when you want, no matter where your money is going. Firma is trusted to move more than \$14 Billion in payments around the world safely and securely for their clients. At Firma every client has a dedicated full-time Currency Specialist, monitoring the elements that can affect currency, to ensure they are providing their clients with a competitive exchange rate anywhere in the world, every time. Firma knows that currency exchange can be complicated and they are committed to keeping it simple.

“Upland InGenius was the best CTI vendor we found for compatibility, usability and flexibility. They’ve been able to expand with the needs and capability of the team – and quickly. I’ve been really impressed with their level of knowledge and their genuine ability. The fact that I could request workflows and Upland InGenius understood what I wanted right away, was so refreshing.”

The Upland InGenius Solution

After evaluating multiple CTI solutions, Firma Foreign Exchange selected to proceed with InGenius Connector Enterprise. What really set Upland InGenius apart for Firma was the flexibility of the solution and the technical know-how of the team. Firma Foreign Exchanges uses Upland InGenius to increase the productivity of their sales teams with time saving features like click-to-dial. With the implementation of Upland InGenius workflow integrations to Salesforce, Firma has built a gamification system that rewards users for utilizing the right tools and processes.

Key Results

Sale users make 25% more calls using click-to-dial

Every day, the Firma sales and business development teams dedicate time to outbound calling. The business development teams were looking for a way to make it easier for them to dial through their lists. Using click-to-dial, (a standard feature), allows users to click on any phone number within Salesforce to place their call. This meant the teams no longer had to switch between applications or manually dial numbers. This reduction in the number of clicks and room for error has led to a 25% increase in calls placed.

Salesforce gamification increased employee motivation and process adoption

The basic concept with the gamification system Firma implemented within Salesforce is to award points for tasks completed. Employees can earn extra points for tasks completed using the preferred, most efficient process. On a weekly basis, points are tallied, and employees can see how they're doing compared to other users in their office, region, and across the same role, leveraging incentives over discipline.

Upland InGenius gave Firma a way to easily track calls that were closed through InGenius. For each call that's dispositioned using InGenius, the user receives twice the points that they do for just placing a call. By placing this extra encouragement to use Upland InGenius, Firma pushes their employees to perform their jobs in the most productive and effective way.

“There are a lot of ways to do things in Salesforce, and some employees tend to take a longer path, even if it means more work for them. Upland InGenius workflow integrations allowed us to gamify our call processes and bring that data into our Salesforce Score Dashboards, which play off our sales departments' competitive nature and resulted in our teams adopting better working practices.”

Contact an Upland InGenius Representative to learn more.

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