



# The Growth Engine® Customer Success Story

**Fleet Financial®**  
Denver, Colorado

## Customer Profile

Fleet Financial is a national finance and insurance marketing company that specializes in low-cost vehicle loan refinancing. By offering reduced interest rates compared to most automotive dealers and banking institutions, they are able to quickly sign on new customers that are looking to save up to several hundred dollars per month. As an added bonus, many also receive greater insurance protection, which can cover them in case of accidents that don't fully reimburse at replacement value.

## TGE BUSINESS INTELLIGENCE SYSTEM DRIVES FLEET FINANCIAL TO GREATER SUCCESS

### The Problem

TGE was commissioned by Fleet Financial at the end of 2015 to help the company incorporate a host of digital marketing techniques, which greatly expanded and strengthened the company's marketing reach. The incorporation of social media postings, content development, search engine optimization, and email campaigns had not only greatly modernized the company's marketing approach, but had resulted in increased leads that were far more apt to convert to sales than ever before. At the same time, the new digital approach succeeded in substantially reducing the cost per lead to attract each customer.

Once the leads began rolling in -- often as many as 2,000 per day from as many as seven different sources -- Fleet Financial desperately needed a better way to track them. Their old system was not nearly flexible or intelligent enough to handle the company's lead management and analytics demands; they needed a solution with customizable reports and dashboards, as well as greater front- and back-end sophistication.



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## TGE Solution

While Fleet Financial had looked into various off-the-shelf systems, none were capable of meeting all of the company's unique needs. Specifically, they needed the ability to filter and prioritize leads amassed from multiple sources, equitably assign leads to salespeople based on their existing workloads, and add transparency to the entire transaction process. Leads that were not appropriate to pursue, in turn, would be passed along to the ideal third-party partner for follow up.

Failing to find any solution in the market that met their needs, Fleet Financial inquired as to whether TGE could take on its software development process in the hopes of finally being able to maximize the impact of the company's highly successful marketing efforts. After an extensive diagnostic session with key managers within Fleet Financial, TGE rose to the occasion and presented a custom solution that addressed every lead management and analytic challenge the Fleet Financial team had. By using

Artificial Intelligence to determine which were considered "hot leads," the company could ensure that they were attacking leads in a systematic and efficient manner so that no valuable leads would get lost in the shuffle. Using the new system, no salesperson would be able to "cherry-pick" the best leads or move on to new and better leads before the ones they had were sufficiently processed. Rather, they would be carefully assigned among the company's 200 salespeople according to a complex algorithm.

Qualified Leads  
Increased by

**44%**

Cost per Lead  
Decreased by

**\$186**

Sales Productivity  
Improved by

**12%**

## The Result

The system tracks each lead from its initial source -- whether resulting from a direct mail program, cold call, social media posting, direct referral or other program -- through the sales and post-sale process. Every aspect of each transaction is tracked for ultimate transparency, accountability and evaluation of employees.

By eliminating the manual aspect of managing leads and sales activities, Fleet Financial is able to increase the velocity of business, allowing them to eventually realize greater productivity and profitability. Dennis Wukovits, VP of Information Technology of the company, couldn't be more satisfied with the improvements the new system has begun to deliver.

*"Now, reports are being pushed out automatically detailing items related to lead generation efforts, performance by team and by rep, and account metrics."*

**Dennis Wukovits, VP of IT**

Dennis further elaborated, "Increased visibility is helping our sales team work smarter -- not harder -- producing better results. The Growth Engine first helped us break through the marketing clutter to become recognized as one of leading auto refinancing companies in the world. Now, I'm excited to see how far this new system can take us in better serving our many thousands of customers."

## About TGE

The Growth Engine is a revenue generation agency that specializes in providing tailored strategies, actionable roadmap, and execution services for business leaders who are committed to developing a revenue generation focus in their organization.

With over 50 years of combined industry experience in revenue generation, The Growth Engine team helps companies create a winning revenue generation engine within their organization addressing their strategy, resources, systems, processes & structure that affect their ability to generate revenue. The outcome is the creation of a robust **"Revenue Generation Engine"** that is able to deliver desired revenue outcome. TGE then takes it further to assist companies to tailor design an action plan and TGE team works hand in hand as part of the client's revenue generation engine to execute that plan.



Contact [info@the-growth-engine.com](mailto:info@the-growth-engine.com) for a complimentary diagnosis of your current revenue generation practice and how you can improve your revenue results.