Platform that Virtualizes the PBX and IVR Hardware and Architecture within multiple CRM Systems providing Analytics and Intelligence for Sales and Service

“Our sales acceleration platform enables any sales or support team to scale quickly, focusing on key growth metrics – lead generation, agent productivity, and client contact rates.” - Joshua Tillman

Joshua Tillman CEO

DialSource For more information visit: www.dialsource.com

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CEOCFO: Mr. Tillman, what is the idea behind DialSource?
Mr. Tillman: DialSource is a sales acceleration platform with a robust cloud-based dialing engine. It effectively virtualizes the PBX and IVR (Interactive Voice Response) architecture native within CRM systems, providing new layers of analytics, intelligence and automation for sales and service departments.

CEOCFO: How does your approach apply to your clients?
Mr. Tillman: We work with organizations to consolidate their telephony hardware and software into a single CRM system such as Salesforce.com. DialSource generates information regarding who is being called, why they are being called, and what the call outcome is - allowing the system to then pump these analytics into the CRM system for intelligent data management. These analytics are then used to automate sales and service follow-up activities. Our Post Call Automation feature, which has the ability to instantly update fields, send emails, sequence tasks, and log actionable intelligence at the end of phone calls is a crucial component of DialSource. It allows management to clearly understand what sales and service reps are doing during and
at the end of conversations, and how leads, contacts and accounts are interacting with an organization at all tiers of communication.

CEOCFO: Have companies been looking for a better way regarding hardware or are many people still not aware that it can be done?
Mr. Tillman: We started DialSource nearly 11 years ago and one of our initial problems was the fact that we had a solution to a problem people did not yet know existed. In the last 16 to 24 months, we have seen the cloud telephony industry move from the early adopters phase to the early majority. As enterprises are moving to the cloud for various applications, they seek mechanisms to streamline, automate and reduce the maintenance and cost of legacy systems. A powerful example is the professional sports industry. We started working with the NBA about 3 years ago, by virtualizing their telephony hardware and software to create a cloud-based telephony engine, and the success bled across other industry segment to the NFL, NHL, and even universities like Stanford. We are seeing a strong uptick in adoption rates and demand for cloud-based sales acceleration software.

CEOCFO: What are some of the more simple things that a company will realize and see now as an example of something outside the box?
Mr. Tillman: One of the big things that we bring is sales and service compliance. At the end of conversations, agents typically need to update fields, log notes, send emails, and generate a number of follow-up activities. DialSource instantly enters all that information into the CRM system, so management can focus entirely on optimizing strategy. With intelligent data housed on one platform, companies can extract incredible insight regarding the number of calls necessary to move a lead through the sales cycle, how long typical conversations take, how many interested outcomes were derived from a particular call list, and so on and so forth. Having a comprehensive data archive allows organizations to develop strategic approaches to sales and service, streamlining all communication activities.

CEOCFO: With regard to the analytics, are you providing raw data or pointing out areas that need attention? What types of information are you able to provide to your clients?
Mr. Tillman: DialSource’s analytics layer is extremely deep. The system coordinates custom analytics on a client-by-client basis. Because our technology is written natively within each CRM system, our clients can track custom key performance indicators. Our professional services and engineering teams work directly with accounts to help management understand what processes to target within their organization. Some of the key metrics we help identify include how many times records, leads or contacts are called before a conversation occurs, how long those conversations last, and how productive those conversations were. We can also pull insightful data regarding how leads and contacts are interacting with websites, emails and videos in real-time. It’s a full-stack analytical approach, allowing sales and service teams to contact hot leads immediately. These metrics provide deep data granularity for management teams.

CEOCFO: What might you look at that others may not think are meaningful?
Mr. Tillman: Because our engineering firm has spent almost a decade rebuilding the architecture of phone systems, database systems and CRM systems, DialSource allows a deeper layer of analytics to be
derived. We can identify key performance metrics regarding call handling, response times, and conversation outcomes through our analytics engine and Post-Call Automation. For example, DialSource can hone in on performance-based metrics in real-time, so if a sales rep is very effective at contacting leads, resolving issues or winning deals, we can provide more connections to that specific agent. DialSource is then able to create intelligent routing parameters based on this data. With DialSource analytics, we can also determine that an existing contact with an open revenue opportunity is calling into DialSource, connect the specific account executive associated with that record, and pop all relevant caller information onto the screen. Information is dynamic and actionable, because the agent is then able to automate all follow-up processes with the click of a button. The process saves a significant amount of time and streamlines the entire customer engagement process.

CEOCFO: Do the customers of your clients realize this is happening, notice the difference and comment on it?
Mr. Tillman: They do. This is something that our PR and marketing department hones in on when we compile our customer success stories. Our platform is constantly evolving. The primary objective is to ensure our clients understand the quickly evolving capabilities of DialSource, so they can leverage each new feature release. To tackle this problem, we built interactive and real-time tutorials inside of DialSource, so new agents are immediately given all the tools necessary to quickly onboard and adopt the technology. This enables sales and service teams to quickly accelerate customer engagement campaigns from the start.

CEOCFO: What are some of the other industries where DialSource has a heavy presence and where do you see new opportunities?
Mr. Tillman: Sports is a relatively new industry for us. We have been in it for 3 years now, and as of 2015 we hit critical mass, representing many teams across professional sports. Everybody utilizes voice to communicate, and when I say voice it could be a land-line, cell phone, skype, SIP or VoIP. Therefore, all businesses are potential clients of DialSource. We are heavy in software, architecture, and hardware. We are in Silicon Valley and Wall Street. We have been involved in Senatorial and Congressional races over the years. The platform is truly agnostic of industry segments. We are also in academics, launching DialSource for Stanford at the moment. Our vision is to change the way in which modern enterprises communicate across all touch points. We recently completed the first major revision of DialSource in six years, Version 3, which is launching in a few weeks. There are some additions in the new platform that are unrivaled in our segment. Intelligent inbound calling is a primary new component of the system. International telephony is another powerful feature, allowing us to launch DialSource worldwide later this year. We have a number of Fortune 1000 and up to Fortune 100 clients who currently use DialSource in North America, but would like to expand their user base to UK and AU offices. We are expanding deeper within our existing industry segments and expanding internationally to satisfy this demand.

CEOCFO: Are many of your customers involved with Salesforce or is that just one of the systems you handle?
Mr. Tillman: At the moment all of our clients are involved with Salesforce. DialSource is the number one communication system, the number two support app, and the eighth highest ranked application
across all categories for Salesforce. We launched DialSource for Salesforce in 2009 and it has held these rankings for six years straight. As the enterprise has expanded into other CRMs and the market has grown, we have spent the last four years building our open API and CTI platform. This will allow us to bring our unique telephony, workflow automation, and analytics engine to all CRM systems in 2015. In fact, we are preparing to launch DialSource for Microsoft Dynamics within the next 90 days.

CEOCFO: You are now bringing out a new version and going international all at the same time. Is this opportunistic or coincidental? Why the push at this juncture?
Mr. Tillman: Our push with the new version and expanding internationally is both strategic and opportunistic. We have been working hard on this major new revision of DialSource, redesigning architecture to scale to support an international deployment of our telephony network. As our success has increased over the last several years in the Salesforce ecosystem, there has been significant demand not only for international capabilities from existing clients, but also demand for DialSource in other CRM systems like Oracle and Microsoft. Therefore, we have strategically tackled developing a new platform which handles both size and scale strategically.

CEOCFO: How do you reach out to new customers outside of Salesforce?
Mr. Tillman: Our problem over the past several years is that the demand for DialSource has historically outstripped our ability to supply it. We receive dozens of leads everyday, coming in through the Salesforce AppExchange, directly through DialSource.com and through our various content channels. There was the issue of scale and growth, and so about three years ago I went to the University of California for assistance in gaining talent and we created the first PhD internship program with the University of California, Davis. Over the last several years we have pumped in PhD computer scientists, MBAs, psychologists and economists, to help nurture operations, sales, and service departments. We have brought in about 30 people from the University of California Davis full-time at DialSource over the last two years. With this new team in place, we are now well-equipped to handle high volume demands. Because we also maintain a strategic relationship with RackSpace managed servers, where DialSource is hosted, we have top-tier infrastructure support to ensure we continue to provide quality service. We are also currently compiling a very senior sales team to interface with new customers, as demand has continued to rise following sports conferences and the recent Red Herring award.

CEOCFO: Why were you confident in the beginning that you were going in the right direction?
Mr. Tillman: This relates back to the fact that I started DialSource as an undergraduate at the University of California, Davis nearly 12 years ago. I had several internships in sales, service and compliance roles where I made phone calls, and simply could not get people on the line. I also had a series of tasks that had to be done manually every time a conversation took place. Inspired, I recruited a number of engineering friends at various UC campuses to help build a prototype of the initial DialSource product. When I was able to see the efficiency that resulted from this first prototype, I realized there was a pain point within the telecommunication and CRM market that had not yet been addressed. I showed it to a few
senior friends at other software and Silicon Valley firms and they validated the idea that we were working on something quite useful. I then received a phone call from Salesforce, very early into our prototype, inviting me down to global headquarters. We would eventually partner with them to build DialSource for Salesforce.com. From the beginning, we received a great deal of validation that we were working on something that would be demanded by many, if we could accomplish the very difficult task of reengineering telephony architecture and database infrastructure. Then as we started receiving more clients and noticing the return on investment they experienced, those results further validated our work, pushing us to this day as we evolve the platform.

CEO: Why choose DialSource?
Mr. Tillman: DialSource is the global leader and highest-rated cloud telephony platform for any CRM system. Not only are we a leading software and engineering firm in telecommunications technology, but we also have a strong customer support team in place to provide a very strategic hands-on approach with our clients and ensure speedy adoption. Our sales acceleration platform enables any sales or support team to scale quickly, focusing on key growth metrics – lead generation, agent productivity, and client contact rates.

CEO: Final thoughts?
Mr. Tillman: I am very pleased with the help that we have received from the University of California, Davis and the opportunity to hire dozens and dozens of the best talent that the UC has to offer. A large component to the success that we have experienced over the last several years began with identifying a good place to gather quality talent, so they have been very good for us.

Interview conducted by: Lynn Fosse, Senior Editor, CEOCFO Magazine