

BAO AND CASTLIGHT: APPOINTMENT SETTING, ON DEMAND

A Look at How BAO Bridged the Gap to Provide Consistent Market Coverage During a Time of Ramp-up and Growth

Castlight Health offers a health benefits platform that helps engage employees to make better healthcare decisions, improve outcomes, lower costs, and increase benefits satisfaction for its hundreds of enterprise customers and their employees. The market is hot – and, as a result, the Castlight sales team is busy.

The company needed to rapidly expand its inside sales team to keep up with market demand – but understood that building in an appropriate amount of time to hire and properly train these reps would be key to long-term success.

In order to bridge the gap – and ensure ongoing, comprehensive coverage of their target markets while the new inside reps ramped up – Castlight worked with BAO for [Appointment Setting services](#) that would keep calendars full and pipeline flowing.

In this case study, we'll hear from the key players about this innovative application of BAO's services – as well as some of the secrets to Castlight's success.

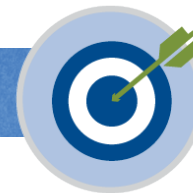


The BAO team went to work immediately – and in **LESS THAN TWO MONTHS**, the program delivered beyond expectations:



MEETINGS

150 MEETINGS
SECURED



OPPORTUNITIES

35 VERIFIED
OPPORTUNITIES
UNCOVERED
...and counting



PIPELINE

\$5.2 MILLION
VERIFIED PIPELINE
generated to date

TAKING THE LONG VIEW

Invest in Proper Training for Sales by Providing Interim Support

“While it was a priority to get the new members of our inside team moving quickly, we also saw value in giving them an opportunity to get ramped up in a stress-free environment,” said Roger Zacapa, Director of Inside Sales at Castlight. “We’ve got a complex message and a complex sale – so it’s a long-term investment to let reps dedicate themselves to learning without the added stress of selling at the same time. But, realistically, we knew that the market wasn’t going to wait until our team was ready, so we needed to figure out an interim solution.”

Zacapa had worked with BAO in a previous role – so when he considered how to augment his team during this time, he knew he could immediately tap into the BAO team’s access, scale and speed to maintain the level of activity necessary to keep Castlight’s regional sales managers (RSMs) busy and successful while easing the pressure on the incoming reps.



“

WE GOT BAO TRAINED ON THE CASTLIGHT VALUE PROP – AND WITHIN A DAY, THEY WERE BOOKING MEETINGS. I KNEW THEY’D BE FAST, BUT THEY WERE SECURING MEETINGS EVEN FASTER THAN WE’D ANTICIPATED.

In fact, they were so quick that we expanded to a second use case. We identified some of our brand-new RSMs who could use an extra shot in the arm to get started – the additional BAO meetings allowed them to really quickly get more at-bats, more time to practice their pitches and, ultimately, more pipeline,” he said.



BEST PRACTICES: WHAT WORKED FOR CASTLIGHT

When asked about the secret to this program's success, Zacapa identified a number of best practices he'd recommend.



BRING THE RIGHT PEOPLE INTO THE PROJECT – AND BE SURE THAT THEY'RE INVOLVED FROM THE START

As the head of inside sales, it was important for Zacapa to be involved at every step of the program – from design to execution and follow up – to ensure that the goals and process for the program were being communicated effectively to his existing team, the right people were in the mix and that everyone's strengths were being leveraged and maximized.

“Communication was key to making sure that everyone was comfortable with how things would roll out, what follow-up would look like and how success would be measured. Having me, as the head of inside sales, be a key stakeholder tied to the success of the project is important. I'm invested, so I'm going to work hard to make sure that everything goes according to plan.”



BE PRESCRIPTIVE ABOUT WHAT IT WILL TAKE TO MEET PROGRAM GOALS

Zacapa said, “If I were talking to someone considering BAO, one of my first pieces of advice would be to tell them to make sure they know their use case and know what they want to accomplish going in. In this case, we knew exactly what we wanted – and having that foundation enabled us to stay on track, achieve those goals and get the most value out of the engagement.”

Zacapa worked closely with Castlight's RSMs and Sales Operations team to identify appropriate target accounts for BAO to go after. “We were very specific about what kind of accounts we were looking for – and we provided guidance on how and why they should select certain accounts vs. letting them figure it out on their own,” he said.



MAXIMIZE THE INVESTMENT AND KEEP THE MOMENTUM GOING BEYOND INITIAL APPOINTMENTS

Put a process and clear next steps in place to ensure that the internal teams know where – and how – to pick up where BAO leaves off so that no opportunities fall through the cracks.

Zacapa says, “The quickest way for us to get value out of this program is to have the RSMs jump on the opportunities that come out of these meetings. But BAO also opened a lot of other doors for us. In the cases where a meeting didn't result in an immediate next step, we know that that there's still value there – we've got a foot in the door and an opportunity to keep that momentum going. Our Sales Ops team was instrumental in designing a hand-off process in Salesforce so our inside reps know when the ball is back in their court – they follow up with their RSM for a debrief to figure out what happened and if there's a way to help move the relationship forward.”

IN THEIR OWN WORDS

Comments from Castlight

ROGER ZACAPA, DIRECTOR OF INSIDE SALES AT CASTLIGHT

“I’m extremely impressed with the results of this relationship. It’s pretty amazing how quickly BAO got started – our RSMs were receptive and really happy with the activity. The investment was well worth it – we’re already at \$5.2 million in pipeline generated, and **JUST ONE DEAL WILL PAY FOR THE PROGRAM.**”

JOHN MCCrackEN, SVP OF WORLD WIDE SALES AT CASTLIGHT

“Roger’s augmentation plan and the resulting partnership with BAO have had a tremendous impact on our business. We’re getting high-quality meetings – and we’re getting them fast. Our new inside reps have the time they need to train properly, our veteran RSMs have full calendars and our new RSMs are getting a huge boost as they kick off in their territories. **IT’S A WINNING STRATEGY ALL AROUND.**”

WHAT’S NEXT FOR BAO AND CASTLIGHT?

Castlight’s new batch of inside reps was soon trained and ready to sell. “At the end of the day, this program was exactly what we needed to carry us through the interim. The results were impressive – and better than we could have anticipated. BAO is a strong partner – I’m open to finding additional ways we can work together again,” Zacapa said.

LEARN MORE

Appointment Setting is where BAO started – and we’re still the best in the business. We’ve set more than 300,000 appointments to date and 55% of our secured meetings are converted into second sales activities. That’s a success rate 35% higher than the industry average, and it translates to approximately \$10 million in pipeline each day. To learn more about how BAO’s Appointment Setting service can give you the scale, speed, access and expertise you need to boost your pipeline, contact us today at info@baoinc.com or 978-763-7500.

ABOUT BAO

BAO is the de facto partner for sales and marketing teams in the high-tech industry developing powerful, profitable go-to-market strategies. BAO gives organizations the real-time insight, tools, and resources they need to transform their businesses – to drive new revenue while increasing the profitability of existing accounts; to optimize sales and marketing operations; to kill the competition; or all of the above. Founded in 1997, BAO is based in Andover, Massachusetts. Learn more at www.baoinc.com.

