# CASE STUDY

# Lead generation on autopilot: Optify Group

streamlines solar sales automatically turning website visitors into sales-ready leads

# INTRODUCTION

In an industry where suppliers are often tarnished by the bad reputation of those that have gone before them, Optify Group are restoring market faith with a client first approach where everything they do is geared towards getting their clients the very best outcome possible from renewable energy.

The industry suffers with notoriously low sales conversions and lead generation can be like fighting against the tide.

This case study explains how Carter Loxworth's customised lead magnets were the perfect approach to help Optify build trust with prospects, fill their pipeline and vastly increase sales conversion rates.

# AT A GLANCE



Turn anonymous website visitors into hot leads



Build trust and reputation with potential customers



Provide prospects with what they came to the website for; positions Optify ahead of its competitors



More pipeline, better quality leads who are ready to buy



Gather rich prospect insights to feed into sales proposals for improved close rates



# **CONTACT US**

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### BACKGROUND

Optify Group are trusted advisors helping clients achieve energy cost transformation with affordable, self-funding renewable energy solutions.

Their solutions eliminate upfront costs and maximise lifetime savings. With various funding options, cheaper energy is within reach, whatever your circumstances or objectives.

Optify are the expert, in the client's corner, to find the most affordable way of unlocking the maximum possible cost savings and optimal sustainability benefits by generating your own on-site renewable energy.

Un-reputable suppliers and schemes have tarnished the reputation of the renewable energy industry to a degree so many prospects have trust issues making lead generation and nurturing difficult.

Optify's client first approach is disrupting the market and runs right through their sales and delivery process. Our lead magnets underpin this, delivering value to prospects from the very first touch point.



<u>Try the domestic solar</u> <u>calculator here</u>



See the commercial feasibility kickstarter assessment here

# CURRENT SITUATION

Renewable energy companies often struggle to convert anonymous website visitors into qualified, salesready leads. Even when leads come in, close rates are low across the industry.

Optify, who already use various lead generation channels had wanted to improve the ROI from their website as they received very few inbound enquiries. Having invested in SEO to drive better bottom of funnel traffic online, the next phase was to increase conversions from that traffic.

Recognising that if only they knew the identity of website visitors, they could follow up with them, so they sought solutions to identify who these high intent website visitors are.

# THE CHALLENGE

Optify, like many advisory firms, struggled with a classic problem: how to get high quality inbound enquiries that signal a prospects intent. They needed a way to:

- Offer insights about project viability, costs and benefits upfront.
- Convert cold visitors into warm, sales-qualified leads and gather vital sales intel.
- Stand out as a client-centric trusted advisor.

### KEY FEATURES



Guided multi-step form to capture client insights



Calculators provide customised rich insights to prospects



Instant brandaligned PDF report; styled, structured, and actionable



Lead capture insights gathered for sales proposals that convert

Get free bespoke lead magnet ideas

# OUR SOLUTION: BEST IN CLASS SOLAR CALCULATORS

We designed and built domestic and commercial website conversion systems in the form of solar calculators. The tools provide prospects with tailored feedback about renewable energy project viability with fully modeled project cost estimates and lifetime savings projections. This is key information that most solar prospects want to see but seldom get from installer websites.

During the data gathering process, the prospect happily shares pertinent information that's needed not only to feed into the calculations the tool does, but also for Optify to qualify and prioritise leads and create winning sales proposals that are perfectly aligned to the specific requirements of that client.

The result is that prospects get first sight of project viability and potential benefits, something Optify competitors don't provide. This builds trust and gives prospects a reason to share their data and signal their intent. This turns anonymous website visitors into hot leads and gives Optify critical sales intel to optimise sales conversions.

## WHY THIS WORKS

Custom lead magnets like this one:

- Build trust fast: offering immediate, tangible client value, it delivers what prospects were looking for, positioning your brand as trustworthy and expert.
- Gather rich insights: gather full context about what each prospect needs so you can create sales proposals that buyers say "yes" to
- Warm the lead: at the next sales touch point, trust is already built, and the prospect is primed to buy.

# THE CLIENT VIEW

"With a highly differentiated proposition in the renewable energy market our lead generation has always been a little more nuanced than others in the market.

We use several different lead generation channels and wanted to elevate what we did to reflect the premium proposition we offer to clients.

Implementing lead magnets that would enhance our reputation whilst building pipeline and gathering vital sales intel was a nobrainer.

On the commercial side of our business, we're particularly excited how the Feasibility Kickstarter tool aligns perfectly to the way we work. It not only provides great feedback that prospects find highly valuable but it automatically gathers insights about the clients likelihood of proceeding which we'd struggle to get previously.

Another key benefit is that the output from the tool helps our prospect to build the business case for renewable energy in their business. It helps them handle objections from other stakeholders and is a key sales asset for us when we're not at the table to discuss the project".

# CUSTOMISED LEAD MAGNETS FOR YOUR BUSINESS

If your website gets traffic but not enough sales conversions or the results of your social media campaigns don't justify your ad spend, you need our automated lead magnets.

We're offering affordable bespoke lead magnet development as a premium service to:

- Consultants & coaches
- Boutique brands
- SMEs
- Service-based companies

Whatever your business and lead generation and sales conversion objectives, we turn anonymous website visitors into hot leads and client value into high intent.

#### NEXT



Get instant tailored ideas for lead magnets that could transform your sales process



Talk to us about lead magnet ideas and impact for your business

These lead magnets not only solve the longest running challenge we had, identifying who our highest intent prospects were, but also provide insights that makes it easier to sell to them

Director, Optify Group

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