

## \* CASE STUDY

# Speed Dial: How a Faster Outward Response Program Boosted Sales 30%

A leading auto insurance company struggled to manage the thousands of new leads that came in daily. The company wanted to improve its lead flow processes and at the same time develop a sophisticated quality scoring model that would increase sales and reduce costs. The carrier chose Warm-Transfer, a business unit of Customer Solutions Group (CSG), to help them achieve their goals.

### BACKGROUND

The automobile insurance lead marketplace is highly competitive. Independent agents representing different companies compete with captive agents and direct writers, who represent one company, for consumers who have gone online to request a quote. To make a sale, speed is crucial. Internet shoppers expect an instant response. The first agent in is the likeliest to win.

This particular carrier is a direct writing operation, with licensed sales reps who are highly skilled at selling insurance but lack the technological resources for optimal outbound dialing campaigns. The client approached Warm-Transfer because of its ten-year track record in warm transfer campaigns, its state-of-the-art technology and high-quality, US-based agents. Added to those factors were the proven strengths of Warm-Transfer's parent company, CSG, in consulting, customization, data handling and reporting.

### A MODEL FOR SUCCESS

Once engaged, Warm-Transfer immediately began to gather leads from third-party websites and the carrier's own website, posting them to Warm-Transfer's servers. Warm-Transfer next created sophisticated analytical models customized for each lead type. The models dictated:

- Optimum number of dials
- Script to be followed
- Best times to call
- Telephone number to make the transfer

### THREE STEPS TO A SALE: CALL, QUALIFY, TRANSFER

Then Warm-Transfer's dialing systems went to work, so fast that calls often reached interested customers while they were still sitting in front of their computer. When someone was on the line, a professional from Warm-Transfer's call center asked a few strategically selected qualification questions and then transferred likely purchasers to agents at the carrier's call center, who closed the sale.

**Warm-Transfer** 

## Floundering in a Flow of Leads, a Top Auto Insurance Company Finds a Fast Way Out

### KEY RESULTS

Warm-Transfer helped a leading insurance company solve a lead flow challenge and:

- Expand new business by 30%
- Reduce cost per sale
- Free up expensive licensed staff from lower-value prospecting to higher-value selling
- Introduce new calling strategies for non-buyers



### A LIFE LINE LIFTS SALES

In the collaboration between the client and Warm-Transfer, which is ongoing, about 4,000 interested customers have been transferred each day. New business has increased by 30%. In a highly competitive environment, Warm-Transfer's client has dramatically increased sales from Internet leads, reduced costs and increased market penetration. A company once drowning in a sea of leads has been rescued by a life line in the form of a faster outbound response program.

### TESTING FOR BETTER TARGETING

Throughout the process, Warm-Transfer has continually tested scripts and lead criteria. These methodically created test cells helped Warm-Transfer and its client target and segment internal and external lead sources while continually improving the lead scoring model. Warm-Transfer is now testing other proprietary source strategies for this carrier to enhance sales opportunities previously lost.

**877-274-5221**

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**millions of transfers – and counting!**