



Customer Solutions Group
The Inside Sales Lab™

Insurance Company Solves Significant Lead Flow Challenge

Warm Transfer Case Study



Key Results

Utilizing the STEP™ Process, CSG was able to:

- Transfer 4,000 interested consumers daily
- Deliver consumers accounting for over 30% of new business policies
- Reduced cost per sale
- Focus expensive licensed staff on selling insurance rather than lower value prospecting
- Introduce new calling strategies on non-buyers

Customer Solutions Group

1355 S Colorado Blvd,
Suite C-510
Denver, CO 80222
Phone: (303) 658-9675
www.InsideSalesLab.com

Overview

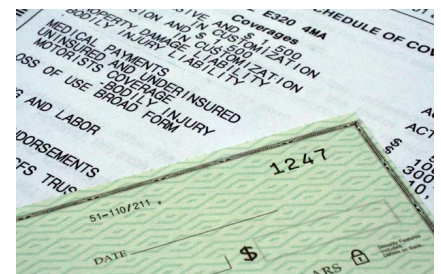
A nationwide, direct writing, automobile insurance company struggled to manage the thousands of daily new auto insurance leads they received in their call center. They selected Customer Solutions Group (CSG) as their business partner to assist them in improving their existing lead flow processes, as well as develop a sophisticated quality scoring model that would increase sales and reduce costs.

Background

The automobile insurance lead marketplace is highly competitive. Independent agents, captive agents and direct writers compete for new consumers who have gone online to request a quote. Speed, consistent processes and an ability to connect with the consumer are hallmarks of the optimal online lead strategy. While many direct writing operations succeed at selling insurance, their licensed staff and current technologies are often ill-equipped to succeed at outbound dialing strategies. These factors caused CSG's client to investigate leveraging CSG's ten-year track record with warm transfer campaigns. CSG's solution is comprised of both state-of-the-art technology and extremely high quality, US-based agents.

The client selected CSG based on their inside sales, call center, and warm transfer experience as well as their commitment to consulting, customizing the solution to the client's unique situation, and superior data handling and reporting capability.

With over 60 years of combined experience in call center operations and consulting, CSG's management team ensures that our efforts actually work in the real world of our clients' call center sales teams.

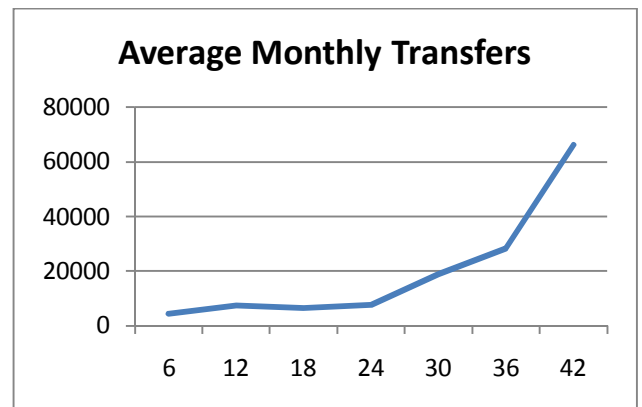


Case Study (Continued)

This ongoing, 30+ month engagement has evolved into a two-step process where customer leads are gathered from 3rd party web sites, as well as the carrier's own web site, and posted to CSG servers. Utilizing CSG's InsideSalesWebResponse capability, a sophisticated analytical model is applied to each lead. The results of the model dictate, for each individual lead, everything from the number of dials to be made, the script to be used, the calling priority, and the number to which transfers are made. Instantaneously, this results in key customer information and lead handling instructions being loaded into CSG dialers. An outbound call is made to the consumer, many times while they were still sitting in front of their computer. Once the consumer is reached, CSG qualifies the prospect by asking a few strategically selected qualification questions. Based on their responses, likely purchasers are then passed to licensed agents at the carrier's call center who close the sale. Throughout the process, CSG utilizes the STEP™ process for tightly designed testing of scripts and lead criteria. These methodically created test cells help CSG and their client determine which segments are profitable and which are not, thereby promoting continuous improvement.

The Results

Due to the successful use of CSG's proprietary technology and processes, the client is able to achieve their goal to dramatically expand their sales by creating a faster outbound response program while focusing their licensed staff on selling insurance. CSG has successfully transferred over one million consumers interested in insurance to this carrier to date. Additional information captured through the testing process also allowed the client to better target and segment their internal as well as external lead sources while continually improving the lead scoring model. CSG is now testing other proprietary source strategies for this carrier that is enhancing sales opportunities previously lost. In summary, the client, working with CSG, has identified a way to successfully grow sales using Internet leads, reduce costs and increase market penetration in a highly competitive environment.



Increased conversations with Internet generated consumer leads increased sales dramatically over a multi-year period.



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For more information, contact
abroome@INSIDESALESLAB.COM