

# Insurance Dialogue – Case Study

## *“Increasing Results with the Help of Dedicated Licensed Telesales Insurance Teams”*

### **The Problem:**

Insurance Dialogue was approached by a leading provider of choice-based retiree health care programs. This company’s innovative programs enable employers to transition retirees from a legacy group benefits platform to an account-based program that offers retirees unbiased advice, selection, and enrollment in a health plan that fits each individual’s needs. With access to over 1,900 unique health insurance plans, it remains vital their company employ a sales staff that is educated on all available plans.

Our client’s desire to grow their national policyholder base, while still providing exceptional service, became a huge challenge during open enrollment season when inbound phone calls would nearly triple in volume. They needed a sales force that was not only well-trained, but also licensed in states. This meant in order to grow their business; they needed to get beyond their traditional sales model and beyond their own walls.

### **The Solution:**

To tackle this challenge head on, the insurance provider made the decision to outsource a large portion of the sales and support to Insurance Dialogue. Additionally, our client requested we hire, train, and certify a quality management team to help manage their other outsourced partnerships.

With only a few weeks until open enrollment season started, Insurance Dialogue recruited, trained, licensed and employed 65 full-time employees as health care advisors. The training program included a certified health insurance license, with registration across multiple states.

Insurance Dialogue went beyond the call and designed and deployed an outbound opt-in message blaster to drive additional volume during slow times, as well as, delivered quality monitoring services across their 7 vendor partnerships.

### **The Results:**

- 65 licensed Advisors and 20 non-licensed Agents (**Quality Team**)
  - 85% advisor retention (Monthly increases, Stay Bonuses)
- Recognized as **Top vendor** (of 7 vendors) based on Results
  - *Performance, leadership and flexibility*
- Designed and Deployed outbound **message blaster** w/ Opt-in feature
  - Drove additional volume during slow times
  - Launched appointment setting campaign beyond initial scope to better load balance call arrivals
  - Implemented an appointment setting campaign with non-licensed agents in order to best utilize the licensed agents’ time and skill set



For more information call **800.523.5867** ext. **7480**, or visit [www.Dialogue-Marketing.com](http://www.Dialogue-Marketing.com)