



Program Improvement Leads to Increased Sales for Insurance Company

Opportunity

Our leading global insurance client operates in more than 80 countries and jurisdictions, providing a large range of insurance products to commercial and individual customers, including:

- › High Net Worth insurance
- › Property & Casualty insurance
- › Life insurance
- › Retirement products

They expanded their lines of business with Qualfon and launched middle-market insurance selling based on direct mail responses. We started selling high net worth products and services to their private client group. However, supervisors noticed the team was missing sales goals by 17%.



- › INCREASED CSAT SCORE TO 98 WITH A GOAL OF 96
- › INCREASED SALES BY 20.2%
- › ADDED ADDITIONAL LINES OF BUSINESS

For more information on
our insurance solutions,
contact us today!

877-261-0804

www.qualfon.com

Increased sales by 20% with program improvements

Solution

Qualfon implemented new program leadership with business specific sales experience to help improve sales rapidly. Agents were provided with additional sales training to address both product and process concerns. New features were also added on the program's CRM to ensure agent activity was accurately being tracked.

In addition, Qualfon enhanced the team bonus plan to help motivate agents by:

- › Ranking agent performance based on the number of cases completed and the number of activities they tracked per day
- › Providing agents with bonuses for hitting certain targets
- › Rewarding agents with incentives for production accomplishments including the first sale of the day, most sales in a week, highest sales dollars for the week and a perfect QA score
- › Celebrating reaching team goals with fun and motivational activities

Results

After three months of implementing these new processes, agent performance improved significantly:

- › Increased CSAT score to 98 with a goal of 96
- › Increased sales by 20.2%
- › Exceeded sales goals for five consecutive months by a cumulative 10.14%

The success of the program led to increased client satisfaction and further lines of business were awarded to Qualfon.

**For more information on our insurance solutions,
contact us today!**

877-261-0804

www.qualfon.com

