

Insurance Sales Group Unlocks New Sales Model and Accelerates Growth

ISSUES

- Struggling to contact enough leads to hit sales targets
- Limited revenue and growth potential
- Slow manual dialing process drives up idle time and inefficiency
- Agents failing to stick to paper-based sales scripts

SOLUTIONS

- Powerful dialer and robust performance reporting
- Tools supporting virtual sales model, including Dynamic Scripting and Agent Monitor
- Caller ID reputation management
- Customizable, accurate answering machine detection

RESULTS



2X

Appointments scheduled

From 6 to 20 per agent



80%

leads transferred

From <100 daily transfers to >250



7X

Headcount growth

Expanded from 12 to over 90 closing agents



When we switched over, we saw a lot higher contact rate, a lot more efficiency, like how fast we were able to call through the leads...On Convoso, you're always getting connected to somebody."

Zach Helton
Dialer Admin



Innovative Financial Group (IFG) is one of the fastest growing insurance platforms in the country. They deliver customized Medicare, Life Insurance and Retirement Planning solutions through a large platform of diverse insurance products and services.