

ALLSTATE AGENT #1 IN NEW AUTO, HOME POLICIES

Producer productivity skyrockets with 375% more actions per user



INDUSTRY

- Insurance

COMPANY PROFILE

- Allstate Corporation (NYSE: ALL)
- Company serving satisfied customers for more than 70 years
- Regional Allstate office in New York
- Policies available include Auto, Home, and Property & Casualty Insurance

CHALLENGES

- Difficulty breaking into the highly competitive New York market
- Struggled to compete against big, high-volume insurers utilizing high-tech call centers

SOLUTION

- Allstate agent, David Williams, turned to Velocify for a more effective way to manage and convert leads

BENEFITS

- Built a \$2M book of business in 2½ years and achieved the #1 status for new auto and home policies
- Improved producer productivity, increasing number of actions per user by 375% and contacts made per user by 175%



BUSINESS CHALLENGE

For New York-based Allstate agent and owner, David Williams, breaking into a saturated and highly competitive market as a new agent was no easy task. Williams knew he would be competing against high-tech call centers run by big, high-volume companies like Geico and Progressive. And with consumers doing most of their insurance shopping online and getting quotes from multiple competitors, it was critical for Williams to leverage sales automation technology to outperform his competitors. Williams also knew that being the first to contact new insurance prospects was a critical success factor in beating the competition.

SOLUTION

To break into the competitive New York insurance market, Williams knew he would need to deploy a number of different marketing tactics, including buying Internet leads, search marketing, telemarketing and “feet on the street” campaigns. Williams invested the bulk of his marketing dollars on Internet leads, targeting competitive zip codes that typically produced stronger close rates. He knew that buying leads was no guarantee of success and that he’d need the right technology to instill selling discipline, improve speed-to-contact and, most importantly, increase conversion. He looked at CRM solutions like Salesforce.com and others, but ultimately determined he needed a solution that was focused on converting leads into customers. He turned to Velocify and chose to implement Velocify LeadManager™ paired with CallFire’s sales dialer. He quickly realized, however, that integrating Velocify Dial-IQ™ with LeadManager was much easier than managing two systems and produced superior results.

BENEFITS

Williams opened his agency in 2009 with absolutely no clientele. Over a 2½ year span, his office built a \$2M book of business and achieved the #1 status for new auto and home policies in the New York area for two consecutive years. Williams attributes much of the office’s success to Velocify.

Williams opened a second agency with nine producers and within the first month was able to sell 80% more property and automobile policies, on average, than other new offices.

“With Velocify, my producers are getting to new leads within seconds, which is critical to ensure we compete in nearly every deal.”

David Williams, Allstate Agent

“Velocify allows us to track, measure and stay on top of every lead,” said Williams. “It keeps us a step above the competition.”

COMPETING IN EVERY DEAL

A major part of Williams strategy was being first to contact and quote new leads. “With Velocify, my producers are getting to new leads within seconds,” said Williams. “This is critical to ensure we compete in nearly every deal.”

After making contact with a prospect over the phone, Williams producers take the opportunity to make a personal connection versus competing on price alone. While speaking with prospects, producers highlight the office’s key differentiators including the agency being open seven days a week and their high-touch, personal service, which is something that larger insurance chains just can’t offer.

Williams leverages both LeadManager and Dial-IQ for key features including real-time lead capture and lead distribution for improved speed-to-contact. Shotgun Connect rings the phone of all available and eligible producers, ensuring immediate call-back. The integration with Williams’ quoting engine provides real-time quotes to prospects for faster conversion rates.

“With our quoting engine integration, we are able to send a quote to a prospect via email within minutes of the inquiry coming in,” said Williams. “Not everyone wants to connect via phone, so automated email quoting gets us in front of a lot of prospects we might not otherwise talk to.”

GETTING THE MOST OUT OF EVERY LEAD

In addition to focusing his producers’ attention on new leads, Williams also focuses on aged leads and marketing to existing customers.

Williams encourages his producers to run a pre-set report to identify potential opportunities for aged lead marketing in their downtime. Pre-set reports typically include existing customers that have auto policies but no home policy or vice-versa, x-date reports of policy holder’s coming up for renewal, and much

more. “With Velocify, our producers always have something to do,” said Williams. “When they have downtime, they can backfill with aged-lead marketing.”

The productivity of Williams’ producers was apparent by his numbers. Over a two-year span, Williams’ team of producers increased sales productivity per user by more than 375% and number of call attempts per user by 389%. The increased productivity paid off with a 175% increase in contacts made per user.

Williams also leverages many of the standard and customized reports available to measure everything from marketing effectiveness to overall producer performance.

“We use Velocify to pinpoint potential producer performance improvements to enhance employee coaching,” said Williams. “For example, if one producer’s talk time is drastically below average I can drill into that by listening to call recordings and suggest talk track changes to improve results.”

Williams also measures lead provider performance and campaign source performance on a regular basis, and changes his mix of marketing efforts based on what’s most effective.

A COMPLETE SOLUTION

Prior to using Velocify and Dial-IQ, Williams used CallFire but found that it couldn’t match the value and performance of Velocify LeadManager paired with Velocify Dial-IQ. Having an integrated lead management and dialer solution makes Williams’ life easier and ensures no lead is left behind.

“There is no such thing as a one-call close,” said Williams. “Once an inbound call comes in or an outbound call is made, having it connected to the Velocify solution ensures my producers always know the next follow-up action to take.”

ABOUT ALLSTATE

The Allstate Corporation (NYSE: ALL) is the nation’s largest publicly held personal lines insurer. Widely known through the “You’re In Good Hands With Allstate®” slogan, Allstate is reinventing protection and retirement to help more than 17 million households insure what they have today and better prepare for tomorrow. Consumers access Allstate insurance products and services through Allstate agencies, independent agencies, and Allstate exclusive financial representatives in the U.S. and Canada, as well as via www.allstate.com and 1-800 Allstate®.



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