

INDEPENDENT AGENCY GENERATES OVER 400 NEW POLICIES MONTHLY

Velocify allows agencies to increase agent productivity and write more policies



INDUSTRY

- Insurance

COMPANY PROFILE

- Kanopy Insurance Center
- Headquartered in Los Angeles, California
- Online consumer market
- Policies available include Auto, Property and Casualty Insurance

CHALLENGES

- Highly competitive and saturated marketplace with brand-name agencies running technologically advanced, high-volume call centers
- Complex and multi-tiered sales process
- Minimal IT and sales support resources
- Limited budget for sales, marketing and lead management solutions

SOLUTION

- Velocify LeadManager
- Velocify Dial-IQ
- EZLynx Integration

BENEFITS

- Cost-per-sale is less than half the industry average
- Accelerates lead response by 300%
- Maximizes ROI on IT Investment
- Seamless implementation in under two weeks



BUSINESS CHALLENGE

Ryan McClintock, Co-Founder and CEO of Kanopy, spent more than nine years refining best practices for insurance agents by partnering with many different insurance companies in a variety of leadership roles in sales and business development. Through these interactions, McClintock saw first-hand how the industry at large had difficulty effectively selling to the online consumer. McClintock observed how agencies struggled to call quickly, persistently and intelligently, resulting in subpar conversion rates. It was this discovery that motivated McClintock to open his own agency, specializing in targeting the online consumer. Although well-equipped with business acumen and experience, McClintock knew Kanopy still faced the challenges of selling in an ultra-competitive market against technologically advanced, high volume call centers run by “big-name” agencies and direct carrier call centers.

SOLUTION

To sell to online insurance buyers, speed is king. It's a hyper-competitive market where online consumers are contacted by 5-10 agents, so being first on the phone significantly increases the likelihood of conversion. If you're second or third or worse, you'll be calling consumers who are no longer interested in talking to another agent and repeating the same conversation. To meet the demands of selling to online consumers, Kanopy knew they needed a tool that would streamline their agency to face any competitor.

“With Velocify my agents can effectively manage prospects from inquiry-to-quote-to-close. Velocify puts the focus back on selling by taking the guesswork out of sales process and follow-up.”

Ryan McClintock, Co-Founder and CEO, Kanopy Insurance

While most agencies starting out would struggle with processes and managing manual lead forms, McClintock knew the very best in sales automation was necessary in today's fiercely competitive market. To ensure an edge for his agency right out of the gate, he chose Velocify's intelligent sales automation solutions and was able to implement in less than two weeks.

“Because of my past experience with Velocify, I knew it was the best system for sales automation,” said McClintock. “Despite that belief, I still researched and tried out all other systems to be sure Velocify wasn't inferior to any other solution. After careful review of all systems, I had total confidence that Velocify was the best.”



Kanopy uses Velocify to quickly respond to leads and simplify a very sophisticated sales process, one that would be impossible to follow without products like Velocify LeadManager™ and Velocify Dial-IQ.™ Sales agents are prompted to call prioritized leads, and reminded about appointments and call backs – ensuring that leads are never neglected. Additionally, the integration of Velocify with EZLynx,® a leading provider of real-time quoting, allows Kanopy to respond and provide quotes to prospects in real-time, emphasizing the agency's commitment to customer service from the very first touch point.

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BENEFITS

Velocify has helped catapult Kanopy into an agency that, although small in size, is generating 400+ new policies per month with only eight full-time agents. It has allowed the carefully designed systems and processes to be successful from the start.

“Velocify was the system that powered our sales engine since the first day we launched Kanopy. It's one of the primary reasons we are able to convert leads at a profitable cost-per-sale.”

McClintock credits Velocify with improving not only agent productivity but also efficiency, as well as considerably increasing revenue.

“Increased revenue is the biggest benefit. Our cost-per-sale is less than half the industry average.”

ABOUT KANOPY

Kanopy was founded by two industry veterans, Ryan McClintock and Chris Skarinka, who worked on different sides of the insurance industry that eventually led them to discover a major opportunity– selling more effectively to the online consumer. Kanopy was founded on the belief that an insurance agency can grow a profitable business by targeting consumers whose preference is to shop for insurance on the Internet.



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CSK10314