CONVERSATIONAL CRM™

SUCCESS STORY

# Outsourced Sales Pipelines For Insurance Brokers

**Creating growth in the Insurance sector is a challenge, it's a very mature market where strong relationships must be built to retain customers. The Key2Growth has met this challenge head on with a range of innovative solutions outsourcing the early stages of the sales pipeline for Insurance Brokers. The Key2Growth has developed a deep understanding of this niche market and built a skilled team who identify and nurture new business opportunities, which are only handed over to the broker when they're ready for a quote.**

Traditionally this work has centered around telephone calls made to establish a relationship, build trust and agree to refer the client to the broker at renewal time. Key to this is a rigorous process which makes this work smoothly and has generated The Key2Growth predictable results for their customers, the core of the business. After trying, and rejecting, several CRM packages and marketing automation systems they settled on ConversationalCRM as the best way to support this business-critical process.

The conversational nature of the system has enabled more intelligent, joined-up conversations over the extended periods found in the insurance business. The flexible nature of the system and it's advanced features mean that they've been able to implement their process effectively and achieve great control over the whole pipeline of interest identification, development and then handover to their clients.

Like many markets today the insurance business is moving away from a total reliance on calling and placing greater emphasis on the delivery of interesting and useful content to build relationships.

The Key2Growth has responded positively to this challenge by including e-mail, social network and web content delivery to their business development programmes. The early stages of a dialogue is increasingly becoming digital and they are now providing their clients with the means to support and track these conversations on an outsourced basis complementing the creative agencies delivering the compelling content.

ConversationalCRM has proved to be the ideal platform for these services with integrated e-mail, social networking and web page capabilities. Regular emails are sent to nurture prospect relationships and the resultant activity on landing pages and web forms is tracked to measure interest. Calling is still critically important but now it's one thread in a multi-channel approach.

Malcom Rose, the MD of The Key2Growth explains that "the support provided by ConversationalCRM means that not only can my team manage and track all activity but that the system allows them to share everything, effort, information and results, in real time with the important people, my clients". ■

The Key 2 Growth
Making Success Inevitable

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