



## COMMERCIAL INSURANCE

Ongoing Monthly Partnership | CASE STUDY

**3600**

Call Activities (Dials) Monthly

**2.94%**

Appointment Setting Rate on Call Activities

**43%**

Appointment Ran Rate (Appts Completed)

### Project Objective

To develop a sustainable, ongoing sales development appointment setting via cold calling and inside sales support to fill the sales pipeline for 2 account executives to run appointments with prospective insurance buyers in select industries.

### Company Profile

Our client, a commercial insurance company, is focused on risk management and is based out of the Midwest. They have been in business 20 years providing commercial, specialized, and personal insurance with a consultative approach. This client has utilized outbound prospecting and appointment setting as a strategy for business in the past, but seeks a partner for complete outsourced service.

### Scope-of-Work

This client engaged Superhuman Prospecting (SHP) in the Summer of 2019 to deploy an outbound sales development project to sustain account executive schedules for running appointments. Opportunities created by SHP would be set in a calendly.com account and integrated to our client's calendars.

### Pain

Our client had success in the past with outbound prospecting. They had markets targeted and conversion metrics to live by, but were facing issues surrounding consistency of execution. As our client was growing, root causes for execution stemmed from time needed for internal hiring, training, managing, and delivering successful outbound campaigns on a regular basis.

### Strategy

Since time and resources were a major factor in consistent results for our client, utilizing SHP for quick set up and execution on 3600 call activities would help bring weekly and monthly appointment levels up to speed efficiently with multiple SHP team members available.

The project strategy would be to divide efforts into 3 separate campaigns targeting 3 separate markets, totaling 1200 call activities dedicated to each campaign. Each market would receive a separate, custom script specific to each marketplace to ensure the message resonated succinctly with the prospective buyers.

### SHP Services Integrated

The following SHP services would be utilized for the successful delivery of the project:

- >A dedicated account manager assigned to the client
- >3600 call activities monthly to be used by SHP call team members in pursuit of setting up appointments
- >CRM lead management. SHP would update positive leads generated into our client's Zoho CRM directly
- >Pre-appointment confirmation calls prior to appointments



*“Outsourced,  
Higher Intelligence  
Sales Development  
Conversations  
For Your Business.”*

### Current Results

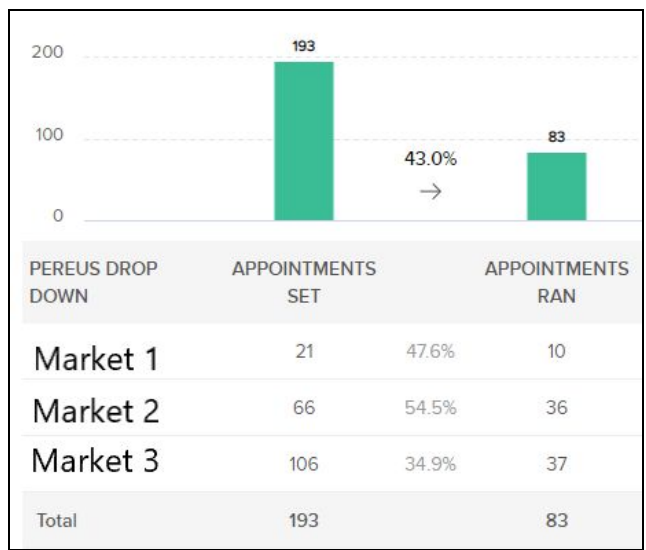
The project started smaller, and ramped up to 3600 activities per month based on early success in the late Summer of 2019. After approximately 3 months of success at a smaller scale, our client tripled the activity upwards with SHP and included one more market to be targeted.

Results have been prioritized to be measured in 3 different ways specified by the client. SHP is responsible for 2 metrics, and our client takes responsibility for 1. As seen in the results in the Zoho rendering to the right, SHP is responsible for *appointments set* and *appointments ran*. It's important to measure both to balance quantity and quality.

### Longevity & Sustainability

After multiple months, results stabilized and the team at SHP now focuses on weekly and monthly optimization to continue driving results forward. Several SHP call team members are dedicated on this project, while some are used as supplemental to prepare for more expansion

### Recent Metrics



via Zoho CRM

### “CTA Tiers” Used

- CTA Tiers\*\*\* (Intro [Video 1](#) & [Video 2](#)):**
- 1) **APPT EQUIVALENT 1:** Prospect agrees to phone appointment w/ date and time
  - 2) **WARM LEAD:** Follow-up in the future WITHOUT set date and time
  - 3) **NEUTRAL/WANTS MORE INFO:** Permission to send email/ more information.

The efficacy of the project is ultimately determined by the number sales generated by prospecting efforts. This is measured by appointments *set* and appointments *ran* as seen in the “Recent Metrics” chart above generated by our client’s CRM, Zoho.

While these metrics are important, its noted above that not all prospects will be converted to an appointment. SHP saw value in longer term deals by creating alternative “CTA Tiers” for this project, or, “Call to Action Tiers” to serve those who may take longer in the sales process.



## Priority Metric Breakdown

As a final analysis and for deeper insight, the following metrics are the KPIs (Key Performance Indicators) measured for defined success. We dive into each below.



### Appointments Set



### Appointments Ran



### Closed Deals

## Appointments Set

As noted in the “CTA Tiers”, Appointments Set are those leads that the SHP call team members have spoken to and have agreed to a date and time for a conversation about changing insurance providers.

## Appointments Ran

Appointments ran are those appointments set that actually *happen*. This is a crucial difference, as encouraging people to say yes without any commitment or interest to carry them to the appointment can suffocate an outbound sales development campaign.

## Closed Deals

Finally, that metric that proves the investment works the best when *appointments set* and *appointments ran* are optimized. Account executive skill and talent play a major part, but if no attempts at bat are given, its hard to hit a homerun.

## Moving Forward

The stability has been identified with this client through consistent metrics hit on a monthly basis. However, there is room to grow in the appointments set and appointments ran metrics. The higher these can be, the greater the success for SHP and our client. Sharpening the saw and continually learning allows both parties to grow together.

Our client is one of the Midwest’s premier insurance providers, so as success continues, other areas of our clients business are in discussion for SHP to take on.

As we learn and grow, other campaigns are having success based on the learnings and efficacy of this project.

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## A Note from the CEO of SHP

*“Whats most exciting about the relationship with this client is I saw our team put their heads down with the goals at hand to create strategies that tightened up the systems and processes responsible for increasing the results in each market on a month to month basis.”*

*While we did see early success, giving our client confidence to increase the size and complexity of the project by the way we focused on continuous improvement has resulted in dividends for both parties for the long term.”*

*-Ryan S. Pereus, CEO, Superhuman Prospecting*