



Customer

QuoteWizard sells insurance leads to insurance agents and carriers across the U.S.

Challenge

Increase lead quality and engagement rates for clients

Conversica Solution

Real-time, automated sales conversion management

Conversica Virtual Persona

Customized name per campaign

Conversica Assists

- 2,000 leads per week worked by Conversica
- Increased engagement rate as high as 40 percent

QuoteWizard Increases the Quality of Leads for Insurance Industry Clients with Conversica®

Lead quality is the top priority at QuoteWizard, one of the largest independent, privately-held insurance lead providers in the United States. Based in Seattle, the company generates high quality insurance leads for thousands of U.S.-based agents working for leading insurance carriers, including State Farm, Allstate, Geico, Nationwide, Farmers, and many others. Driven by a commitment to provide the best quality leads and best agent experience, QuoteWizard has been recognized as a "fastest growing company" by *Inc. Magazine*, Deloitte, and *Puget Sound Business Journal*.

As a competitive lead aggregator, QuoteWizard's growth and success are the result of management's constant goal of seeking out and providing the highest quality leads to its clients. In the fall of 2013, QuoteWizard's management began to explore new approaches to improving the quality of lead sources and in turn enabling their insurance agent clients to increase engagement rates. The company launched a pilot of Conversica®'s sales conversion management solution to assist with an internal campaign to re-engage former clients to purchase again from QuoteWizard. Management also tested Conversica on the leads that QuoteWizard was procuring and selling to agents. The pilots were very successful both in terms of bringing back old clients and in increasing the engagement rate of QuoteWizard's clients.

"Engaging leads in the most timely manner is one of the biggest challenges for our insurance agency clients, especially for independent agents who simply do not have the time or resources to follow up on every lead," says Ian Hopper, email marketing manager at QuoteWizard. "The Conversica pilots proved that automated sales conversion management could not only solve the problem of contacting every lead, but more importantly, increase an agent's engagement rate significantly."

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*Ian Hopper
Email Marketing Manager, QuoteWizard*

Case Study

Insurance

The Conversica solution

While QuoteWizard uses Conversica itself, the company also offers Conversica as an add-on service to its insurance agency clients. The company sells leads at an individual price per lead, and agents can opt to manage the lead with Conversica for an additional cost. To date, more than 500 agents have used Conversica to automatically contact, engage, qualify and follow up with leads.

"The agents using Conversica now love it. Especially single agents in smaller offices as they now have an 'assistant' who can respond to all leads around the clock," Hopper says. These agents appear more professional since they are responding to hot leads in a timely manner."

QuoteWizard has integrated Conversica with internal CRM systems to feed approximately 2,000 leads a week from multiple sources into Conversica. Every time a new, hot lead goes out to an agent, it also goes to Conversica to be worked 24/7 until the lead engages or opts out. As a lead aggregator, QuoteWizard can sell the same leads to multiple agents within different carriers. "The integration is great because we can have Conversica working on the same lead for different agents, but each agent can retain a personalized Conversica experience with a custom name for the human persona," Hopper says.

Conversica assists

QuoteWizard is in a unique position because it sells the lead and the add-on Conversica option to the agents them-

selves, so management often gets timely feedback on the benefits of using Conversica. Overall, QuoteWizard's clients have gained more insight into the true quality of the leads they purchase because of the visibility gained through Conversica's two-way communication with leads. However, QuoteWizard's website is full of testimonials from satisfied clients like this Farmers Insurance agent who said: "The number of good leads I get in a day far surpass every other lead provider out there. If I were a new agent again, I wouldn't even try anyone other than QuoteWizard."



"Agents were calling the leads themselves before Conversica, but couldn't get a hold of them, so they thought it was a cold lead," Hopper says. "But now they have a multi-pronged calling and email follow-up approach with Conversica, and they are seeing how our lead quality continues to increase over time, not to mention improvements in their engagement rates."

Conversica has delivered the following benefits to QuoteWizard's insurance industry clients:

- Increased engagement rates to between 25% and 40% depending on agent and line of business
- Enables insurance agents to mine more value, faster, from QuoteWizard-generated leads

As a lead aggregator, QuoteWizard also benefits from Conversica's robust metrics for evaluating the performance of lead sources. "Evaluating lead sources to insure that we sell the highest quality leads is a huge part of our business," Hopper says. "Conversica gives us much more information to help us determine which lead sources result in the highest engagement rate. We know that if our leads are not high quality, the agents will go elsewhere."

"Providing the best services to help our clients close more leads is our main goal at QuoteWizard," Hopper says. "It's proven that the faster you follow up with a lead, the more likely it will become a solid contact. Our clients who use Conversica are getting a better return on investment on their leads because Conversica responds in real time. That also means our clients can have a competitive advantage over agents who are not using Conversica."

"Conversica is really unique," Hopper says. "I don't think there is anything else like it in the market that can interpret an email response and respond appropriately."

For more information

See for yourself how Conversica is revolutionizing sales conversion management. To learn more call +1 (888) 778 1004, email sales@conversica.com or visit www.conversica.com to set up a product demonstration.

About Conversica

Conversica is the only provider of lead management software for marketing, inside sales and sales organizations. Presented as a customized online persona, Conversica engages and nurtures leads through natural email exchanges until the lead converts into an opportunity or opts out. Conversica is used by more than 12,000 sales representatives worldwide and has assisted in the creation of more than US\$8 billion in sales revenue.

Founded in 2007, Conversica is a portfolio company of Kennet Partners and Toba Capital, and is headquartered in Foster City, California. To learn more, visit www.conversica.com and follow us on [LinkedIn](#), [Facebook](#), [Google+](#), [YouTube](#), and @myconversica on [Twitter](#).