



Better Lead Management Drives Health Plan Success

The Challenges

- Agent quality and motivation
- Unqualified leads
- Inefficient transfers
- Wasted time and resources
- Need for rapid scalability

The Solutions

- Scalable, dedicated offshore team
- Continuous training
- Custom tech
- Web restrictions
- Consistent training
- Quality assurance
- Improved lead management

The Results

- Over 85% ALT rates on inbound calls
- 85%-90% training graduation rate
- 80% of agents proficient in 1 week
- 100% of ROI's team earning commissions
- Added 22 business lines to ROI's responsibilities
- Increased ROI's headcount 800%

Using Innovative Technology to Match Customers & Health Plans

For over 20 years, this company has been a leading health insurance marketplace in America. They use proprietary technology, licensed insurance agents, and a telecare team to match health insurance plans to customers' needs. By offering unbiased advice, transparent benefits, and free access to government subsidies, the company has become a trusted advisor in the health insurance sector.

Improving Efficiency & Reducing Resource Waste in Lead Management

Previously, the company had a successful relationship with ROI CX Solutions. At the time, ROI rapidly deployed 100 agents within 36 hours and scaled up to 230 agents at the peak. However, the partnership ended due to internal issues within the company.

Over the next couple of years, operations faced challenges with agent quality, motivation, and coaching, leading to specific problems. They sent unqualified leads to licensed insurance agents, inefficiently transferred qualified leads, and marked calls with incorrect dispositions. These issues hampered operational efficiency, wasted time and resources, and led to inappropriate follow-ups with prospects. Additionally, the business needed rapid scalability to handle increased demands during peak enrollment periods.

Improving Lead Accuracy, Maximizing Sales Potential, & Ensuring Security

When the brand resolved their internal issues, they eagerly renewed their partnership with **ROI CX Solutions**. ROI proposed a



About ROI CX Solutions

Established in 2008, ROI CX Solutions has always been committed to delivering client-centric solutions, even amidst economic challenges. The efforts of ROI CX Solutions have generated over \$22 billion in revenue for their partners. Offering services in 29 languages, their dedication to excellence has been recognized in the 2022 Inc. 5000 list.

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comprehensive approach by implementing a fully offshore team of Tier 1 agents dedicated to providing qualified leads, accurate lead transfers, and correct call dispositions.



ROI's multi-step strategy included targeted solutions:

- **Scalability:** Creating a dedicated offshore team that could quickly scale up during peak enrollment periods
- **Training:** Offering continuous training to ensure high standards in lead qualification and call handling
- **Integration:** Providing seamless updates to Five9 with a customized scripting interface
- **Security:** Enforcing web access restrictions to ensure workflow security
- **Coaching:** Maintaining consistent agent training, ongoing performance coaching, and detailed performance reporting
- **Quality Assurance:** Establishing a strong quality assurance framework

Using the company's proprietary systems, ROI ensured accurate call dispositions and effective lead transfers. Additionally, ROI CX Solutions identified and leveraged sales opportunities while fostering strong customer relationships through personalized interactions and diligent follow-ups.

Optimizing Operations, Increasing Proficiency & Expanding Services

The collaboration with ROI CX Solutions led to significant improvements in operational efficiency and lead quality. During an initial three-week trial phase, the offshore team exceeded the target of a 14% Assisted Live Transfer (ALT) rate on outbound calls, performing 15% better than outsourced teams. ROI consistently exceeded 85% ALT rates on inbound calls, with frequent peaks above 90%.

The partnership achieved an 85% to 90% graduation rate from training programs, with 80% of agents meeting their target proficiency within the first week. Implementing a commission system resulted in 100% of ROI's team earning monthly commissions. The successful trial phase led to the company expanding ROI's services to an additional 22 business lines and increase ROI's full-time employee (FTE) headcount from 16 to 145 agents.

Through strategic interventions, dedicated support, and a focus on quality and performance, ROI CX Solutions not only resolved the company's initial challenges but also positioned them for sustained growth and success in their future lead generation and sales efforts.

Could **ROI CX Solutions** be the solution you need?
Let's chat!

Consistently Achieved 85%+ ALT

Exceeded Outsourced Teams' ALT by 15% in 3 Weeks

80% Proficient in First Week

Over 85% Training Graduation Rate

100% of ROI's Agents Earning Commissions

800% Increase to ROI's Headcount

Expanded ROI's Services to 22 New Business Lines



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