



# IGNITIST - Lead Gen and CRM Solutions for Healthcare Insurance Clientele

## CLIENT OVERVIEW:

Ignitist is an insurance agency in Philadelphia focused on Marketing, Distribution, and Product Sales provision to Life Insurance clients. The veteran organization particularly aims to provide affordable, accessible, broad-range, equitable health insurance, and its subsequent products to its consumers.

Their mission undertakes future financial stability and safeguards for the involved families by creating a dynamic consumer cycle. Ignitist focuses on several under-served markets for whom traditional insurance marketing frequently falls short. This includes prospective parties such as:

- Seniors needing help with their Medicare insurance
- People with final expense life insurance needs
- People in need of long-term care, etc.

Having obtained a vast experience in the sector, Ignitist is the one on the front lines of Senior Healthcare. They have observed first-hand where populations are inadequately serviced with traditional healthcare coverage. Ignitist views insurance as a public need, so Premier BPO is elated to assume the responsibility of assisting wherever we can.

## ABOUT MEDICARE:

Medicare facilitates health coverage for over 60 million Americans, 65 or older, every day. Running since 1966, it also caters to people with kidney failure and disabilities. Medicare has different plan packages with certain cost gaps. It also requires you to be a citizen or to be present lawfully in the US to attain eligibility status.

Medicare can be obtained in two different methods when enrolling; Original Medicare (Part A and B) and Medicare Advantage (Part C). Basic Medicare (Part A and B) does not cover dental, cosmetic surgery, acupuncture, hearing-exams, eye-exams, long-term care, and dentures. Part D (prescription drug coverage) can be obtained separately, while Part C combines benefits of all three with some out-of-pocket costs.

Ignitist sells both Medicare supplements and Medicare Advantage to its clients acquired from transferred Premier BPO leads.



## THE CHALLENGE:

Ignitist required handling of level 1 Lead Generation to maximize lagging productivity. Premier BPO would enable their highly paid, licensed assets to be free to handle critical tasks, while our offshore agents would acquire customers. Utilizing labor arbitrage to reduce the overall cost of staffing, our frontiers would deal with front-end lead gen and cold calling. Qualifying people over 65 interested in Medicare, our agents would convert them into warm transfers for the Ignitist closers.

## EXPECTATION:

Ignitist expected the Premier BPO team to evaluate and further stimulate the prospects' interest in revamping their current Medicare status. Our frontiers would enact scripted cold calls and then send the warm transfers onto the onshore licensed insurance agents, as per CMS requirements.

## OUR ACTION PLAN

- We initiated the program with 15 FTEs who verified details like age, postal codes, interest in a particular plan, etc. on two offshore sites.
- Currently, PBPO has a team over 100 people, expanding to increase alongside in 2021
- Customizing our plan further, we are gearing up to handle increased volumes during the Annual Enrollment Period, gradually targeting to add over 50 more FTEs in 2022

## FUNCTIONS PERFORMED BY OUR FTEs:

- Receiving 5,000 to 10,000 leads per day
- PBPO personnel to make outbound calls, loaded into Premier's dialer (Five9), to the provided list of contacts
- Inform the customer based on the script provided by Ignitist
- Making 60,000 to 100,000 calls per day
- Obtain, verify, and determine the eligibility of prospect based on pre-defined criteria
- Qualify and transfer all Medicare leads to both Ignitist and its other third-party clients

## OUR VALUE-ADDED PROPOSITION:

Ignitist did not possess a centralized leads management system (CRM) which caused data accumulation that needed to be dealt through manual reporting. The lag meant the potential loss of customers with the data being exchanged back and forth. Additionally, there was zero visibility, and therefore no confirmation of data transfer on a lead to the involved third party. This resulted in cumbersome, repetitive activities which required re-confirmation of information provided (e.g. name, age, phone number, etc.)

Premier BPO proposed that our developers create a customized web-based database/portal utilizing open-source technology to enable mindfulness of all work components. Lead distribution management would become efficient as records of all transfers would be automated, while providing specified notes for the closer. It would also benefit by linking PBPO, Ignitist, and the involved Third Parties while providing useful metric reports, analysis on list sources, conversion rates, and transfer percentages, etc.

## FUNCTIONAL CAPABILITY OF THE PORTAL:

The designed solution permits the supervision of each user's role through authorized access to system functions. Other features include:

- Lead management through reporting of daily leads received from Ignitist
- Visible conversion rate summary and statistics with flexible search parameters
- Leads search and transfer with clear closer status
- Perpetual communication between Fronter and Closer through comments
- Limited edit mode features to allow one user at a time, while multiple users can view lead info.



## OUR ACHIEVEMENT:

Premier BPO was able to provide an overview of critical system operations in real-time, which enabled smooth functionality in a time-saving manner. Surpassing the client's expectation, we were able to deliver:

- Over 75 warm transfers per day, 5 transfers per agent per day, on average. This exceeded the daily expected
- The client agreed to ramp up the operation from 15 FTEs in June 2020 incrementally, reaching over 100 in 2021, and planning to ramp up to 200 FTEs in 2022

## WHY PREMIER BPO:

Premier BPO's adept Business Development methodology allows active lead generation for companies that sell Health Insurance. Carefully orchestrating the basic process flow, we continuously optimize outcomes and allow you to perform to your strengths. Our custom-built solutions are specifically designed to root out inefficiencies and enhance performance. We empower our partners towards co-sourcing for long-term relations and prosperity in unison.



## Premier BPO

Office: (931) 551-8888

Email: [info@premierbpo.com](mailto:info@premierbpo.com)

Website: [www.premierbpo.com](http://www.premierbpo.com)