

# InGenius



InGenius Ensures Productivity for  
2-10 Home Buyers Warranty



**INDUSTRY:** INSURANCE    **SIZE:** 500+ EMPLOYEES    **LOCATION:** AURORA, CO

## KEY IMPACTS:

- Individual monthly calls increased from 400 to 1,500
- 27,000 activities logged in Salesforce

## THE INGENIUS SOLUTION

2-10 Home Buyers Warranty (2-10 HBW) needed a computer telephony integration (CTI) solution that would allow their reps to focus on placing calls and making connections, without a steep learning curve. Though they did consider two other solutions, they chose InGenius because of its simplicity. InGenius Connector Enterprise provided an easy way to increase call capacity, standardize calls and track activities for both individuals and teams.

*"The most important thing is time spent on the phone. We need the reps to be 100% focused on what they're saying, not tied up in the little details."*

Ya Yun Chan | Resale Integrated Sales Manager | 2-10 Home Buyers Warranty

## THE CHALLENGE

The insurance industry is highly competitive. For 2-10 Home Buyers Warranty, although the quantity of calls placed isn't the only metric of success, it's one they believe directly correlates to revenue. They wanted a way to increase their outbound sales agents' calls and also make it easier for them to do their jobs. A secondary requirement was a way to track their activities.

Since time spent off the phones figuring out processes or troubleshooting is time lost for sales, 2-10 HBW was also looking for a solution that is both easy to use and easy to implement. They began looking for a CTI solution that would bring their call data into their Salesforce CRM.

## BACKGROUND

2-10 Home Buyers Warranty is an insurance company that provides comprehensive home owner's coverage for systems and appliances, as well as structural warranties for new home builds. The company operates with the philosophy "long live happy homes" and is also in the business of promises kept, something they achieve by providing reliable, knowledgeable service to their customers.

Their outbound sales agents spend most of their time on the phones building relationships and sourcing new clients. 2-10 HBW customers can be divided into two categories of homeowner's coverage: new homes and resale homes.

The 2-10 HBW resale inside sales team works with real estate agents who are dealing with transactions on resale homes. The team spends most of their day making outbound calls to both existing partners and new prospects.

## KEY RESULTS

InGenius helped 2-10 Home Buyers Warranty make connections and meet their targets. Individual monthly calls increased from 400 to 1,500 and 2-10 HBW reported a total of 27,000 activities logged in Salesforce.

### INCREASED PRODUCTIVITY

Prior to InGenius, agents were only able to make about 20 calls a day. Now they can make 100+, with the bonus of increased accuracy. When reps were hand dialing, they had to dial 12 digits at a time and they would misdial 1 out of

every 5 phone numbers. Now, reps just click on any phone number and it dials for them in one click, with no risk of misdialing. The team can work through their list more quickly and accurately.

InGenius also brought all call information into one place. Now, reps don't need to go to different folders or switch windows to find what they're looking for. The easier it is for each agent to do their job, the more they can optimize their performance and ease the frustration that comes with difficult processes.

*"The reps who had to hand dial before know what a difference InGenius makes. It's almost like manual labor for them now if they had to go back to hand dialing!"*

**Ya Yun Chan | Resale Integrated Sales Manager | 2-10 Home Buyers Warranty**

## STANDARDIZATION

2-10 Home Buyers Warranty customized their call log templates to drop reps' scripts into the notes field with the click of a button. This gives them quick and easy access to their talking points to make sure they hit them every time, and provides a record of exactly what was left in voicemails.

At 2-10 HBW, the inside sales team shares their leads with field sales reps. Standardizing the call log notes allows them to present notes in a uniform professional way, instead of using shorthand and phrases that differ from rep to rep, which might need to be deciphered. Using call log templates has also reduced the amount of time call wrap-up takes, while improving quality.

*"The automation of note taking is the best for productivity. We've tripled our productivity by having something like InGenius."*

**Ya Yun Chan | Resale Integrated Sales Manager | 2-10 Home Buyers Warranty**

## KPI TRACKING

2-10 Home Buyers Warranty builds reports that break down the number of calls received, how many messages they leave, how many live voices they reach and what the dispositions of each call are. At the end of the day, the numbers are important, but it's what the reps are saying to customers that makes the difference. Having reports on items like call dispositions has made it easier for management to coach their teams and refine their pitches.


The resale inside sales team has 3 major KPIs: the number of calls made and what they log in Salesforce, the number of sales, and the number of conversions - first-time agents - they close. Each team member now lives off of their own Salesforce dashboard that shows them their 2 most important metrics: number of sales and activities. This makes it easy for them to stay on top of their commission goals or adjust their day as needed.

*"We love InGenius. It's so much easier than manual dialing when we would only do 20 calls per day. Now we do up to 100."*

**Ryan Mitchell | Resale Integrated Sales Executive | 2-10 Home Buyers Warranty**



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