



Contact Info | Service@H2insight.com | 813.880.9066 Option 3 | Live Chat - H2insight.com

Overview

These calls are an opportunity for agents to increase the number of Life and Retirement cross-sell opportunities and strengthen customer retention through a proven live calling program. H2insight will reach out to customers in your book of business who do not currently have financial services products to identify sales opportunities. You can then follow up with the customer to schedule a financial insurance review.

Description
H2insight (2017 Financial Review, 300 Households Contacted)
H2insight (2017 Financial Review, 500 Households Contacted)
H2insight (2017 Financial Review, 700 Households Contacted)
H2insight (2017 Financial Review, 1,000 Households Contacted)

What Can I Expect?

On every Financial Review / Cross-sell live call we will:

- H2insight manually dials all customers which allows us to call cell phone numbers (This increases the number of customers we are able to reach.)
- Make 2 attempts to reach each customer live
- Thank the customer on the Agency's behalf
- Identify sales opportunities by asking several detailed questions on Life and Retirement
- Provide real-time notification (via email) of all customer responses and identify customers needing immediate attention
- Predispose all customers to the Allstate Customer Experience Survey
- Leave a customized message if unable to reach the customer
- Provide raw data to the Agency with customer information, all answers and comments

When our client service team reaches out to you prior to the first calls being made in January, you will have 2 options:

- H2insight is able to reach out to all to all customer imported for your calling program over a 3 month period or your calls can be made over the course of 12 months. Your client service Account Executive will explain your options in more detail in December.

Benefits to my Agency

H2insight utilizes highly skilled customer experience agents to make all of your calls manually. This call is proven effective at increasing the number of life application opportunities and is designed to help you reach your agency's goals.



Financial Review Calls

National Results

- 35% of customers answer our call
- 41% of customers were left message
- 57% need life insurance outside of their work offering
- 46% have an IRA or 401K through a previous employer
- 27% are NOT happy with amount they are saving for retirement

Best Practices

- On every call that requires a follow up we ask the customer for the best time for your Agency to follow up with them. The best time is ALWAYS and immediate follow up as soon as your receive your real-time notification from H2insight. This gives the customer a WOW! experience.

Additional Resources

- Financial Cross-Sell Call Video: <http://h2insight.com/financial-cross-sell-call>
- Testimonials Page: <http://www.h2insight.com/testimonials>