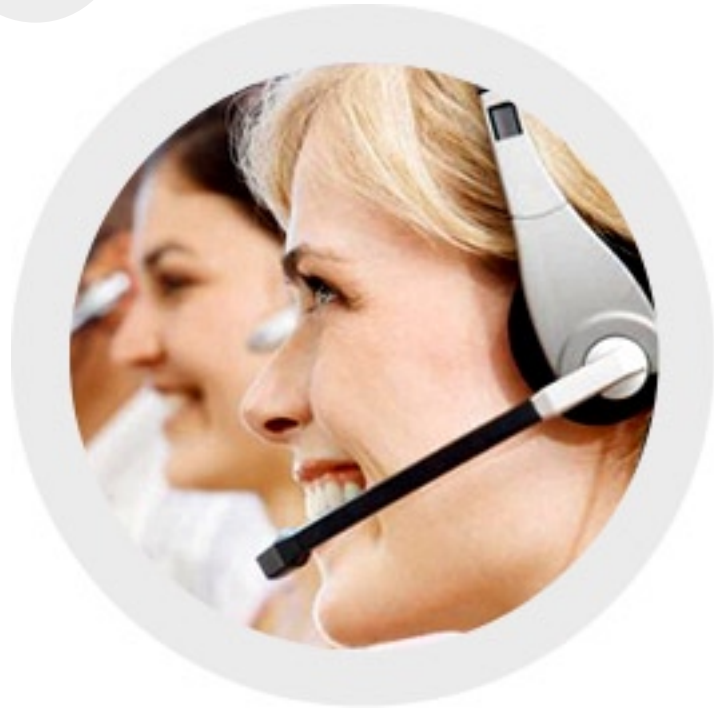


Case Study:

OAKTREE LIFE & ANNUITY BROKERAGE
High Powered Outbound Campaigns



OAKTREE Life & Annuity Brokerage serves the needs of independent life and annuity agents across the United States. They provide value to agents by continually developing relationships with a few top-rated insurance companies with industry-leading products. OAKTREE required a solution to automate their manual dialing and managing the efficiency and effectiveness of their outbound campaigns.

“Our agents are spending twice as much time talking to prospects instead of dialing and dealing with answering machines and busy signals. The service is very simple to purchase and easy to use. We buy as much capacity as we need and when we need it.” – John Irvine, President of OAKTREE Life & Annuity Brokerage

Problems

- Increase agents' talk time.
- Needed an efficient lead management system that allows automated scrubbing of 'Do Not Call' list.
- Agent specific call disposition and management.
- Allow training and coaching of agents to ensure higher quality of service.

Implications

- Ability to increase Agent efficiency by automating all aspects of outbound calling.
- Ensure quality of leads in automated dialer for more qualified leads.
- Ability to monitor and provide support to agents in real time.

Solution

- Web based system allows supervisors to remotely monitor agents.
- Online leads management and distribution to agents based on availability and skills.
- Turnkey solution including dialer and soft phone with no investment in IT or infrastructure.

Result

- Obeylx contact center solution enabled agents to handle multiple campaigns simultaneously.
- The attrition rate of agents was reduced by 75%.
- Enabled them to win multiple campaigns in the financial and insurance sector with the same number of agents with higher performance due to increased talk time.
- Successfully meet regulatory and compliance requirements for contact centers.