

Case Study

Insurance



Customer

Vern Fonk Insurance, an independent insurance brokerage, Washington, USA

Challenge

Engaging and nurturing more Internet leads without hiring new staff

Conversica Solution

Sales conversion management featuring ongoing lead engagement and win back campaign

Conversica Alias

Ava

Conversica Assists

- Sold 874 policies in four months
- Worked 11,780 leads
- Engaged 2,306 leads

Conversica helps independent insurance brokerage convert more Internet leads and win back past customers

Vern Fonk Insurance is an innovative independent insurance brokerage serving customers in Washington and Oregon with auto, homeowner, commercial bonds, commercial truck, and commercial liability insurance. Over the past 50 years, the company has continued to grow and has built its reputation on personalized sales and service.

“Our focus on the customer is a significant competitive advantage for us, so we wanted to be able to respond quickly and personally to all inquiries,” says Robert Thielke, president, Vern Fonk Insurance. “As the volume of our Internet leads increased, we needed to engage and convert them more effectively, but without incurring the cost of adding more staff.”

The lack of an after-hours sales group was also resulting in missed opportunities to capture and engage interested leads. In addition, the agency had no way to scale its processes to convert aged leads and past customers who did not renew their policies.

The Conversica solution

Conversica was installed and in conjunction with the agency's existing customer relationship management (CRM) system, agents immediately began working leads more efficiently. Conversica, a revolutionary sales conversion management platform, assists Vern Fonk's insurance brokerage agents 24/7 to:

- Create automated, two-way email-based communication with leads using a human persona
- Determine the lead's intent in real-time by interpreting text in the email response
- Alert the agent to contact qualified leads who indicate intention to buy now
- Follow up after the agent's initial contact to continue to nurture the lead and get additional information or feedback

“Conversica is a revolutionary tool to take your company to the next level without hiring any more employees.”

*Robert Thielke
President, Vern Fonk Insurance*



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The Vern Fonk agency's goal was to use Conversica to help agents improve contact and conversion rates across four different types of campaigns and lead types:

- **Business hours** – Conversica works the inbound Internet leads that come in during normal business hours. While incoming inbound phone calls are directed to the agency's call center, all Internet leads are captured by Conversica as the first point of contact.
- **After-hours** – Conversica also works leads received outside of business hours. The agency had been losing customers to competitors with online systems that facilitated overnight or after-hours purchases. Today, Conversica keeps prospective customers engaged until the next business day. The system collects basic information regarding the lead's needs so that the agent doesn't need to spend time requesting such information. Instead, the agent can spend 100 percent of the time on the call converting the lead to a new sale.

- **Re-engage** – Conversica also helps the agency engage leads that were considered unresponsive, dead, or idle. Conversica messaged leads that were a few months old and had never responded to an agent's follow-up, or had simply fallen through the cracks. "Conversica's campaigns are highly effective at resurrecting aged leads or working other types of old leads," Thielke says. "Conversica's re-engagement through a human persona extracts as much value from these leads as possible."
- **Win back** – Conversica was essential to a win back campaign that targeted customers who had canceled a policy in the last year. Over four months, Conversica re-engaged and nurtured 226 past customers and alerted agents when they were ready to buy, resulting in the sale or renewal of 56 policies.



Conversica assists

Today the banner on the Vern Fonk website says, "Internet customers go to the front of the line" now that Conversica is on the sales team and fielding Internet leads both during business hours and after-hours.

In less than four months, Conversica helped the Vern Fonk insurance brokerage convert more Internet leads resulting in sales of 874 policies. The sales team is now able to engage with more qualified leads since they no longer need to spend time prospecting or chasing dead ends.

In addition to the 56 policies sold or renewed in the win-back campaign, Conversica enabled the Vern Fonk agency to engage 557 leads and sell 230 policies in the after-hours campaign. Agents were also able to convert 587 dead leads and sell 93 policies thanks to Conversica's persistent email re-engagement capabilities.

"Conversica is a revolutionary tool to take your company to the next level without hiring any more employees," Thielke says. "We have more than accomplished all of our goals for qualifying and converting more inbound leads across all of our campaigns."

For more information

See for yourself how Conversica is revolutionizing sales conversion management. To learn more call +1 (888) 778 1004, email sales@conversica.com or visit www.conversica.com to set up a product demonstration.

About Conversica

Conversica is the only provider of sales conversion management software for marketing, inside sales and sales organizations. Presented as a customized online persona, Conversica engages and nurtures leads through natural email exchanges until the lead converts into an opportunity or opts out. Conversica is used by more than 7,500 sales representatives worldwide and has assisted in the creation of more than US\$7.6 billion in sales revenue.

Founded in 2007, Conversica is now a portfolio company of Kennet Partners and is headquartered in Foster City, California. To learn more, visit www.conversica.com and follow us on [LinkedIn](#), [Facebook](#), [Google+](#), [YouTube](#), and @myconversica on [Twitter](#).