

Case study 05 · Insurance

Close rate from 11% to 17%, with 30% fewer sales calls

Independent insurance advisors · Philippines · 20+ advisors

Advisors now spend their week talking to people who are ready to buy, and the ad budget goes towards finding more of them.

Business impact

+55%

Close rate, from 11% to 17%

-24%

Cost per qualified lead

-30%

Sales calls per policy sold

18%

Of advisor time freed every week

Close rate up within the first production cycle

Before and after

	Before	After
Close rate	11%	17%
Leads that were not buyers	55%	32%
Advisor time spent on dead-end calls	60%	38%

The problem

Lead ads brought in plenty of form fills, but over half were people who were never going to buy. Advisors spent most of their week on calls that went nowhere, and the ad platform kept finding more of the same people.

What we changed

- Five questions up front separate buyers from browsers before anyone picks up the phone.
- The ad platform is trained on qualified leads only, so it finds more of them.
- Ready buyers go straight to checkout; calls are kept for people with real questions.