

INFORM® Branded Calling Online Insurance Platform Case Study



Background

In insurance, timely outbound calls are the bridge between a prospect's interest and a purchased policy. When someone submits a quote request online, that window of intent is brief, and a missed or ignored call means a missed sale. In a competitive market where every lead counts, insurance agents cannot afford to have their calls go unanswered.

Overview

An online insurance platform offering multiple lines of coverage relies on outbound agents to convert web-form submissions into active policyholders. Despite a steady volume of warm leads, agents struggled to make meaningful contact. Prospects who had expressed interest by completing online forms were not answering calls from unrecognized numbers.

Solution

By implementing First Orion's INFORM® Branded Calling, the platform replaced anonymous outbound numbers with their trusted brand name displayed directly on the recipient's phone before they answered. This instant recognition signaled to prospects that the call was expected and legitimate, not spam.

Agents were now reaching the right people at the right moment: prospects who were ready to engage, ask questions, and commit to a policy. The impact was immediate—within just 30 days, the platform saw a **30% increase in policies sold**.

9%
INCREASE
in Engagement
Rate

36%
INCREASE
in Long Call
Duration Rate

18%
INCREASE
in Conversion
Rate

