



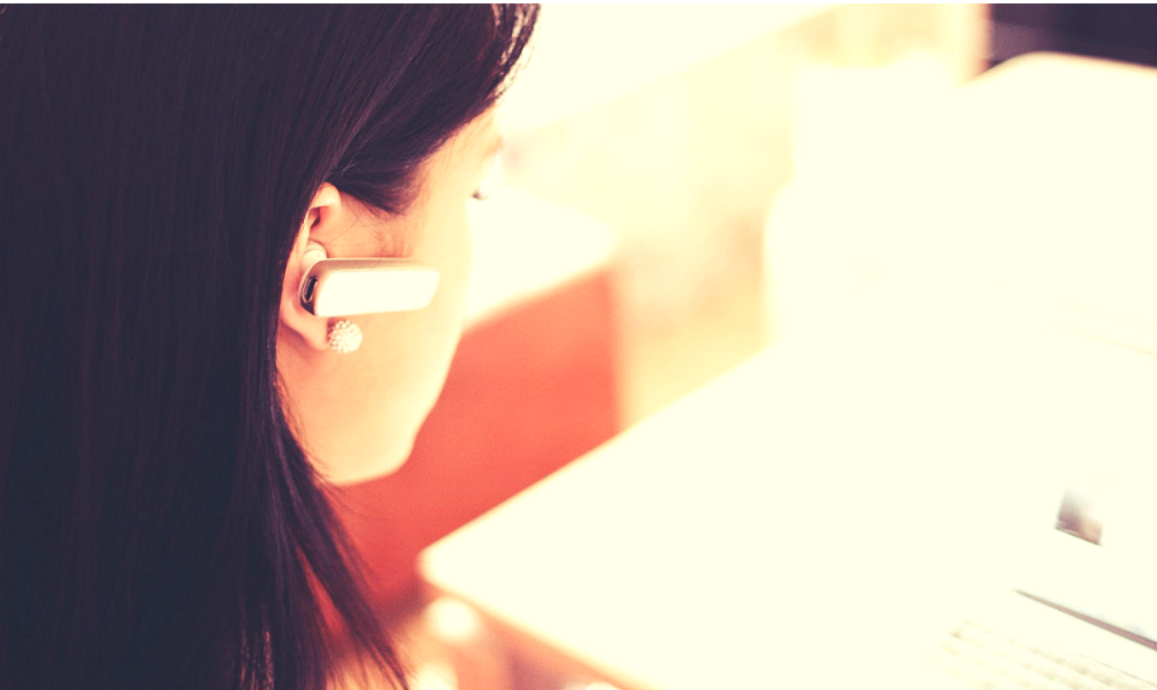
## Call Campaign Generates 60% Incremental Sales

Health savings account (HSA) administrator  
exceeds all sales goals with a highly successful  
lead generation strategy

# CASE STUDY

# SERVICE ENGAGEMENT

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-  Appointment Setting
-  Email Support
-  Market Intelligence

# CLIENT CHALLENGES/GOALS

The client needed a solution to reach out to insurance brokers and HR teams of large employers but did not have the advantage of an inside sales team.

Health Equity developed a strategy to build an inside sales team. However, before hiring full-time employees they wanted to ensure they could prove the model to be worth the internal investment.

The goals of the campaign included:

- Proving that a calling campaign could, in fact, secure enough appointments with highly qualified prospects.
- Proving the ability to convert appointments to revenue.
- Learning the process from a market leading appointment setting and lead generation vendor so they could model their new inside sales team after the successful engagement.



# SOLUTIONS

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Intelemark was hired, along with a second vendor to test and determine which of the two companies could more successfully produce a large number of highly qualified leads. For Intelemark, this turned out to be a 2-year campaign.

As is the standard practice at Intelemark, we assigned a Project Manager and mature, experienced agents to the campaign. Experience, in this head-to-head competition, proved to be a major differentiating factor when Health Equity compared the results of the two companies.

Intelemark implemented its proven onboarding system for the client project, which included:

- **Providing Intelemark agents with compelling talking points** which generated high interest from prospects and produced a much higher than expected number of highly qualified leads.
- **Developing and implementing a multi-touch lead nurturing process** to respond to missed appointments and reschedule the engagement with prospects and Health Equity sales reps.
- **Working closely with Health Equity staff** to continually refine the process and provide the types of highly qualified leads they desired to ultimately convert the revenue generating clients.

# RESULTS

After implementing an appointment setting campaign with two vendors, the Intelemark results were successful far beyond the goals and expectations that had been set. The client was able to prove the inside sales model to be a successful strategy so that Health Equity elected to build their own internal sales team.

## Successfully Proved the ROI of an Inside Sales Model

The campaign proved calling campaigns worked successfully in their marketplace and was worthy of an investment to build an internal inside sales team.

## Achieved 60% Incremental Business

800 appointments in one year were set for Health Equity sales reps. Those appointments were converted into closed sales, generating 60% in incremental business.

## Created an Internal Inside Sales Team

Hired 4 sales reps and 4 inbound sales reps.

Forecasting to grow to a much larger inside sales team within the next 18 months.



# THE HIGHLIGHTS

Intelemark consistently produced a much higher volume of quality leads and a higher quality of leads overall.

The second company employed lesser experienced callers who, while very thoughtful in their communications, did not produce a high volume of leads.

“The calling campaign was successful beyond all expectations. It was so successful that we modeled our new process after Intelemark’s program.

We moved this process in-house because we need to tie the actual results to the brokers our sales reps reach and the sales they close as a result.

If we did not bring this process in-house, we would have certainly continued our engagement with Intelemark.

The entire experience and all the teams at Intelemark were outstanding including the data team, project management, and of course, the callers.”

- Mike P., VP Inside Sales

The experience of Intelemark callers was a notable difference in the success of the campaign and in the metrics that were measured.

It was the client’s belief that bolder personalities when speaking to the prospects, produced the much higher number of qualified leads from Intelemark.

## THE INTELEMARK DIFFERENCE:

Intelemark specializes in complex calling campaigns. Thorough preparation, positivity, experience, consistency and tenacity are some of the ways Intelemark agents continue to deliver outstanding value for clients of all sizes.

**Contact Intelemark at 602-943-7111 or at [Intelemark.com](https://intelemark.com)** for more information and to learn how we can deliver results to meet your business objectives.

