

CUSTOMER SPOTLIGHT



Lifeshield Insurance Doubles Conversion Rate with Ozonetel - HubSpot Integration

Industry: Financial
Geography: US
Association Since: 2019



About LifeShield

Founded in 2010, [LifeShield](#) is a brokerage established by its parent company, Insurance Brokers Group, to simplify the complex world of traditional and specialty life insurance products for families.



The Backdrop

Based out of Kentucky, United States, Lifeshield strives to build a legacy for each client with a tailored approach to “protecting everything that its client can call theirs”. From customer care to lead capture to cold calling, Lifeshield is no exception to what insurance companies do to survive in the highly competitive industry. Aiming to improve turnover ratios while establishing a pricing model that remains competitive, Lifeshield was keen on offering collaborative omnichannel customer support with lesser hassles for its agents.



The Good, Bad, & The Ugly

Lifeshield uses HubSpot as the CRM tool to track its prospect, lead, and customer data. Although HubSpot’s workflow helped segment the database and personalize communication, Lifeshield could not get the benefit of progressive and predictive dialer features with its previous telephony vendor.

Moreover, gradual complaints of poor call quality and lack of real-time statistics put Lifeshield much behind in the number game during the enrollment season. From there, it’s quest for a resilient, reliable, and scalable cloud contact solution began.



Collaboration with Ozonetel and HubSpot Integration

Lifeshield wanted its voice support solution to be centered on HubSpot. Ozonetel's out-of-the-box **integration with HubSpot** meant that agents could dial, answer, and transfer calls from within Hubspot while accessing a unified view of the customer data. Call recordings and chat transcripts after each customer interaction are automatically added to the Hubspot CRM records. Also, agents could click to call any contact within the Hubspot CRM.



| Benefits after HubSpot Integration | How it became easy |
|------------------------------------|---|
| Click-to-dial | Calls can be made by clicking on any contact on Hubspot CRM. |
| Seamless call management | No juggling between windows. |
| Personalized customer experience | Agents could know the purpose of the call even before attending through window pop-ups. |
| Auto logging | Call and chat logs after every interaction updated to the Hubspot CRM. |



Integration with Slack

Ozonetel's integration with Slack ensured no call of Lifeshield goes unattended. The team could get instant notification about any abandoned calls, alerted every time the call queues exceeded a predefined limit with missed calls and voicemails finding their way to the manager or supervisor's inbox.

Results

Improved Sales with Auto Dialers

Ozonetel immediately fixed the issue that had hit Lifeshield the most with the predictive dialer that estimates agent availability and minimizes downtime between calls to maximize agent utilization. Lifeshield could proactively connect with nearly 4000 prospective customers, thereby tripling connection rates - a feat it could never achieve with the old vendor.

Auto dialers optimized agent productivity while making the conversation between customer and agent more interactive.

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Remarkable Increase in Pick-up Rates with Local Virtual Numbers

Lifeshield could accelerate the outbound campaigns with Auto dialers, but it still faced problems with poor call pick-up rates. Hence Ozonetel equipped Lifeshield with area code-specific local virtual numbers that helped the team eliminate the barrier of hesitation in answering the call. This increased the answer rates of outbound calls, and the campaigns yielded better results in terms of more talk times and faster conversions.

Improved Agent Efficiency & Productivity

Ozonetel's custom integration with HubSpot for Lifeshield, worked wonders for its agents. Improved access to knowledge, bird-eye view of the customer journey, timely information at fingertips made agents' work easier, and Lifeshield's vision of a more personalized calling experience was achieved. Their agents were less distracted and more productive, be it responding to voice, emails, chats, SMS, or even social media queries. Ozonetel empowered Lifeshield with a customer-first ecosystem wherein more human interactions and customer success started at the agent's desk.

Real-time Performance Monitoring followed by Impeccable Reporting

Empowered agents mean better customer service. But the admins must ascertain there is no bottleneck in the flow, and the agents are motivated throughout. Ozonetel enabled real-time monitoring of agent performance with features for the admin to barge in, whisper, or snoop during a live call.

The admins also got 40+ live & historical reports including total call distribution, attended calls, unattended calls, unanswered transfers, handle time, after-call work time, and more.

24X7 Whiteglove Support

Ozonetel is known for its one point of contact support, and the Lifeshield team was delighted by the fact that they don't have to talk to new support agents every time. Earlier Lifeshield team suffered inconsistent response time from its previous vendor, with delays as high as 3-4 hours. However, with Ozonetel, the Lifeshield team had a dedicated account manager from migration to onboarding, and it's still the same to date. Swearing by the 24x7x365 support, Ozonetel guarantees a 99.9% uptime with assured on-demand support from even on Thanksgiving or Christmas eve.



Success Story Snapshot

| | |
|---------------------------|---|
| Industry | Financial |
| Website | Lifeshieldfinancial.com |
| Challenges | <ul style="list-style-type: none"> • No auto dialers • Poor call quality • Lack of insightful reports • Costly vendor |
| Results | <ul style="list-style-type: none"> • Doubled conversions • Tripled answer rates • Improved agent efficiency with Ozonetel- HubSpot integration • More successful outbound campaigns |
| Ozonetel Advantage | <ul style="list-style-type: none"> • 99.9% uptime • Dedicated Account Manager • Fastest response time in the industry |



As a brokerage company, we want to simplify lives for our customers and agents alike – and **Ozonetel’s call center solution** has really come through for us. Customers auto-connect with their personal brokers, a Slack integration eased queue management, and the Hubspot dialer integration has amped up agent productivity.

Jason Richter
Operations Manager, LifeShield



About Ozonetel

Ozonetel offers an omnichannel contact center solution to help fast growing, customer centric businesses build a better customer experience. We provide one of the world's most adaptable, flexible, comprehensive contact center suites. But more importantly we pride ourselves on our helpful, personalised consultative approach to ensuring every client can build efficient systems, and a better customer experience.

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