

# Life Insurance Company Gets Custom P2xRM System That Exactly Fits Its Sales Process and Empowers Sales



*"In a call center, every single minute counts. From a sales perspective going from 15 minutes down to four minutes because of the P2xRM system is huge. We're able to improve our sales volume based on that alone."*

- Mary Hale, Sales Manager, Vantis Life

## The Challenge

Vantis Life is a Connecticut-based life insurance company that aims to help hard-working Americans protect their families with life insurance and secure a comfortable retirement with simple, easy-to-understand annuity products. They sell direct to the consumer with live agents on the phone or offer a platform to apply online.

The sales team was using GoldMine, but it did not fit their direct sales model. To prequalify a prospect on the phone and then send them a quote, agents had to switch between multiple systems. There was no logical flow between how the agent collected information on the phone and how it was entered into the system. Their goal was to find a system that would make the call center more efficient to increase the number of dials per hour and overall sales.

## The Solution

The company looked at several CRM systems, but none of them quite fit their specific sales model. The company contacted P2 Automation to evaluate Microsoft Dynamics CRM. When they explained what they really wanted to do, it was clear that P2 Automation could build a custom P2xRM system for a similar cost that would exactly fit their sales process.

*Mary Hale, Sales Manager, explains the benefits of the P2xRM system.*

## The Benefits

### Efficient Call Center Increases Sales

"In the past, we were using multiple programs that never talked to one another. Now, an agent can capture lead information, prequalify a prospect, get pricing and quickly email multiple quotes without leaving P2xRM. A process that took 15 minutes for an agent is now completed in under 4 minutes. This may not sound like a significant time savings to some people, but in a call center every single minute counts. Sales is a numbers game. If four agents spend fifteen minutes, that equates to one hour that they are not helping protect a family with life insurances. This efficiency has made a huge difference to our customer experience, and in increasing our sales."

### Less Clicks and Screen Space Utilization Equals More Calls per Hour

"We were able to design the screens in P2xRM to exactly mirror our sales script. We could even customize it so precisely that the number pad on the side doesn't cover any fields. Our agents are not losing any time switching between screens, looking for fields, not even the few seconds it might take to minimize the number pad. This just would not have been possible unless we chose a system built just for us."

**Vantis Life®**  
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*The P2xRM system is really more than just CRM; it is an all-inclusive sales tool. We were amazed that Steve was able to listen to what we had to say and design this beautiful system that is exactly what we wanted.*

- Mary Hale, Sales Manager, Vantis Life

**P2xRM**  
by P2 AUTOMATION  
[www.p2automation.com](http://www.p2automation.com)

## Complete View of the Application Life Cycle

"Buying life insurance is a process; it could take days or even months for an application to be approved. We set up different status types connected with each stage, so we know at any given point where the application is in the process. A connector from our P2xRM system to our underwriting allows us to quickly look at the progress and make updates. Agents can task themselves so they can easily follow-up on their prospects and manage their cases. The P2xRM system allows us to follow the entire life cycle of the customer."

## Performance Dashboards Empower Agents and Managers to Hit Targets

"I've been in management for many years, and I know that you will have a better performing team when they are empowered to review their own numbers and know where they stand at all times. In P2xRM, we have dashboards that allow the sales agents to view their results and compare their sales performance against other agents. This helps them to achieve their goals with less coaching."

As a sales manager, I can see in real-time who made a sale and our dashboard tells us where we're every day, every week, every month. We can choose any custom date range. Every month we balance to our commission report and usually, we're 99.9% spot on. This is powerful information."

## Accurate Calculations and Reporting in Real Time

"In the old system, users had to do ad hoc reporting that was very complex. The users had to manually create

queries that lent themselves to mistakes and inaccurate data." In P2xRM, the reports are pre-built, and the system does the calculations automatically. They always run on time and give accurate results.

## Good Data Leads to Better Decision Making

"P2xRM helps us make better business decisions. For example, we track our lead sources every time we create a record. Now that we can show where the leads are coming from and which are converting at a higher ratio, that helps us determine which vendor to work with when we buy leads."

## Flexible System Adapts to Changes in the Marketplace

"For small changes, Steve has designed our P2xRM so that we don't need a developer to make updates, the system is flexible and customizable so that we can make minor changes like adding a new lead source. Then, we can work with P2 Automation on larger projects such as connecting P2xRM to another internal system to eliminate manual entry after the application is approved. We have the flexibility to add to the system as our business grows."

## Personalized Service and a Great Product

"Personally, I love Steve. He has a great personality, is very easy to work with and he's so sharp. When I explain something to him, he just gets it. Steve did a great job of understanding what our needs were and delivered an amazing CRM system. P2 Automation gives us personalized service and a great product."

**Vantis Life has a customized sales tool designed to exactly match their sales process, empower their agents and increase sales.**



P.O. Box 452  
Southington, CT 06489  
Phone: (860) 426-8029  
[www.p2automation.com](http://www.p2automation.com)

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