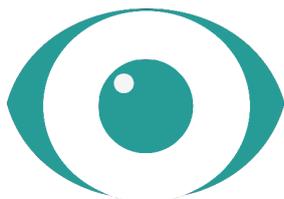


# Outbound SUCCESS



*Life***SEARCH**

LifeSearch is one of the UK's most successful and fastest growing protection advisory organisations, with Health Insurance, Protection Intermediary and Employee Engagement awards gained in the past two years. Covering life, critical illness, income and mortgage protection, LifeSearch is recommended by organisations such as Asda, Moneysupermarket, Swinton and Which.

One of the ways in which LifeSearch stands out in a highly competitive marketplace is the way in which it manages to maintain a very personal and tailored relationship with its clients. Staff are positioned very firmly as helpful advisors and never as agents, focusing on finding out exactly what people need, rather than selling a package. Essential to how LifeSearch supports the people with which it engages is its telephone-based advice centre, spread across three locations in Leeds, Milton Keynes and London. While the company has never had an aggressive outbound sales strategy, most of its calls are outbound, responding to incoming queries either via online or referrals from other organisations.

Underpinning all that activity is a cloud-based outbound dialler service provided by Ultracomms. This cloud-based solution gives LifeSearch the flexibility, scalability and on-going support, and a cost-effective solution that the company is confident will support its outbound and inbound requirements and compliance obligations well into the future.



## The move to an outbound dialler

The story begins in 2010, at which point LifeSearch was working with a standard telephone system, which had performed well enough, but as the company continued to expand, the management team realised a need for a more flexible platform that would support efficient call management. Says Paula Bertram-Lax, Director of Client Advice, "We have just over 100 advisors, split into nine teams across three sites, each with their own support resource. We are typically making around 7,000 outbound calls per day, with approximately 1,000 inbound, so it's a fairly high call volume."

LifeSearch is keen to stress, however, that its use of outbound dialling is not a numbers game. Says Paula: "An advisor will discuss with the caller exactly what their requirements are and depending on those, there may be further calls, or a need to speak to insurers to get the best recommendations, or to ask for GP information and so on. Clients have the same advisor throughout that process, to help ensure a really personal, caring service."

When LifeSearch decided it was time to invest in an outbound dialling solution, it conducted a formal tendering process and Ultracomms was the unanimous choice for several reasons, as Chris Johnson, Services & Change Director, explains: "The Ultracomms solution stood out for several reasons: as a cloud-based solution, it is so easy to deploy; value for money; the fact that it is rich in features; and the support that Ultracomms is able to provide. The technology was new to us and we needed a partner who could guide us through that process, not just during implementation but for years to come."

Ultracomms' ability to engage with all levels of the organisation, from senior management to client-facing staff, both technical and non-technical staff, was another point in its favour and continues to be so, as Chris says: "The support is very good. They react very quickly to anything we need, but also they are proactive, regularly advising on how we can utilise the dialler more efficiently and helping us understand our compliance responsibilities."

Using LifeSearch's API, the outbound dialler is integrated with LifeSearch's CRM and other internal systems, so that as soon as a call connection is made, all the relevant client information is visible on screen. Advisors are presented with outbound calls automatically, so there is no manual intervention required. Says Chris, "from a technical perspective, the ease of integration with our systems has definitely been an advantage."

## Tangible benefits

LifeSearch has observed a distinct improvement in productivity of staff who have enthusiastically embraced the outbound dialler. "Statistics we have produced internally show a lead conversion rate of over 50 per cent when using the outbound dialler, compared to just over 20 per cent with manual dialling as we are able to get to opportunities more efficiently. The technology isn't there to help process more calls, it's there to ensure that clients are spoken to rapidly and efficiently".

"The Ultracomms systems also seems to be very flexible when we need to adjust parameters. Those changes can be made very quickly too, so we can be very agile." Much of the management of the outbound dialler is carried out in-house, but there is regular dialogue between LifeSearch and Ultracomms, particularly around new features that can be adopted to improve outbound call management even further. Says Chris, "Ultracomms is very much leading the way in dialler innovation and we feel sure that we've invested in a future-proof system."

## Attractive pricing

Ultracomms' business model is based on transparent and concurrent usage, so that helps organisations like LifeSearch to budget effectively, particularly when recruiting new staff. However, as Paula comments, "for me, it's not just about cost. There are probably cheaper systems, but they wouldn't give us the scalability or the flexibility that we've got with the Ultracomms solution."

For an organisation that is so strategically focused on providing tailored, high calibre advice to its clients, LifeSearch is confident that it has a system that will help it grow its business while maintaining its core business values, using flexible, cost-efficient and advanced technology that is robustly supported by Ultracomms.

For more information about Ultracomms' cloud and PCI solutions please visit;  
[www.ultracomms.com](http://www.ultracomms.com)

