Customer Solutions Group

The Revenue You're Leaving Behind: Unlocking Quoted-Not-Sold Lead Potential

Our systematic quote follow-up solutions help you recover lost revenue, boosting conversion rates, and maximizing every sales dollar.

Key Takeaways

Quoted-not-sold leads are plentiful, have the lowest incremental cost to work, and high conversion potential, yet are often deprioritized or abandoned prematurely.

In-house programs and singular outreach methods are often inconsistent, immeasurable, impersonal, and ineffective. They're also difficult to manage.

CSG has over 3 decades of experience connecting with this lead type. Every lead is consistently worked, measured, and optimized, with a focus on consumer preference and compliance.

Our methodology results in 20% + improvements in program performance, equating to substantial incremental written premium for insurance providers.

Maximizing Revenue from Quoted Insurance Leads

The Lost Revenue Opportunity

You've worked hard to generate leads and provide competitive quotes to potential customers, yet most of these valuable prospects never convert to policies. While your sales professionals naturally focus on new, engaged leads, there's significant untapped revenue sitting in your "quoted-not-sold" database.

The Reality: switching insurance carriers is an involved process for many consumers, and timing is everything. These prospects aren't necessarily saying "no" – they're saying "not right now."

The Paradox of Quoted-Not-Sold Leads

You have a database full of them, you know the most about them, and these leads are free because you already paid for them. These leads also have an established impression of your brand, making them more likely to convert (assuming price competitiveness).

And yet, despite their availability, your sunk investment in them, the low incremental cost to work them, your knowledge of their risk profile, and the established connection you've already made with these leads, many organizations choose to spend more time on new leads coming in than the leads they've already spent time with. Why?

Why In-House & Single-Media Outreach Doesn't Work

Agents are incentivized to talk to prospects and persuade them, not to leave voicemails and chase down people they've already quoted. Agents are constantly calculating the best use of their time, and rightfully so. A fresh conversation that might convert now is a better use of their time than following up on a conversation where the consumer already said "I need to think about it."

The responsibility for follow-up resides with the enterprise, which is why organizations seek out tools to equip their agents with the ability to reach quoters at scale. Unfortunately, these tools are used inconsistently lead-by-lead and agent-by-agent.

As a result, those who are responsible for follow-up campaigns are often working with unreliable and incomplete data, or a lack of visibility into how much the lead has already been worked, making it impossible to measure effectiveness and optimize the program.

This typically leads to the pursuit of more measurable and scalable solutions, which have their own of challenges:

- **Email:** low cost and measurable, but ineffective in today's noisy B2C environment.
- **IVR Phone Calls, Voicemail drops, and 'set it and forget it' SMS:** these solutions do not capitalize on the personal, human connection you've already made with the consumer.

Managing opt-outs and marketing compliance across all these platforms is equally time-consuming and difficult.

Why We're Different

We blend U.S.-based human specialists with advanced technology to deliver personalized, persistent follow-up via a single, integrated platform.

Outreach Cadence That Pays:

Consistent outreach cadences that ensure regular, timely follow-ups to keep prospects engaged and moving forward without overwhelming them

Market-Tested Insurance Processes:

Decades of experience refining follow-up strategies for insurance brands, deep understanding of insurance buying cycles and decision triggers, and proven messaging frameworks that resonate with insurance prospects

Unified, Coordinated, and Timely Outreach:

CSG is the only firm combining human, automated, and AI-driven outreach on both phone calls and SMS from a single, unified platform ensuring consistent and complete outreach on every lead

Data-driven Optimization:

Consistent, complete outreach enables statistically valid A/B testing; Our market-based testing results continously improves our messaging, timing, and contact methods so every interaction gets smarter and delivers better results for your business

Superior Cost Efficiency:

Dedicated follow-up specialists at a fraction of licensed agent cost; Consistent execution without draining licensed agent time

Instantly Scalable:

Cover lead volume surges while leads are fresh without added overhead to your company

Lead Qualification:

Filter weak leads before they eat into valuable licensed agent time; CSG human and AI systems extract, normalize, and instantly communicate key prospect data from both conversations and texts

Unique Omnichannel Approach:

Strategic combination of phone outreach and SMS messaging, tracked and optimized communications across all channels, SMS and phone calls together deliver superior results compared to single-channel approaches

Compliance at Scale:

Over 30 years without a single inquiry from regulators or private lawsuit; Opt-outs are immediate and universal, making consumer preference and marketing compliance easy to manage

For these reasons, **CSG is *more effective, less expensive, and easier to manage*** than in-house solutions or point solutions.

Results You'll See

Maximized Marketing ROI

- On average, a 20% + lift in connection rate and sales yield
- Lower cost-per-acquisition on unsold quotes
- Improved ROI on marketing and sales investments

Operational Excellence

- A scalable, repeatable follow-up process your sales team will appreciate
- Improved bandwidth to focus on more strategic work
- Consistent brand representation in all prospect communications
- Transparent reporting and analytics on follow-up performance

The Bottom Line

How much policy revenue are you losing in your quoted-not-sold database?

We turn these dormant opportunities into an active pipeline, bringing measurable returns on the leads you've already invested in. Let your sales pros stay focused on high-conversion activities and let us convert the prospects who just needed the right follow-up.

Ready to stop the revenue loss in your quoted leads? We're here to show you the difference a dedicated, professional follow-up approach can make for your insurance business.

For a free consultation to see how much more you can achieve in your quoted-not-sold campaigns, contact The Connection Experts.

Re-engage your unsold quotes – and turn intent into revenue.

Let's Connect

Or, call us at (888)-925-1075

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