

Case Study

# InGenius Ensures Productivity for 2-10 Home Buyers Warranty



**INDUSTRY**  
**Insurance**

**COMPANY**

**2-10 Home Buyers Warranty**  
Aurora, CO  
2-10.com

2-10 Home Buyers Warranty provides home warranties for builders, real estate agents and homeowners, to make protecting a home simple and economical.



**2-10 Home Buyers Warranty (2-10 HBW)** chose InGenius when looking for a way to make it easier for their outbound sales agents to place calls and to track their activities. Since implementing InGenius, the company has seen a 375% increase in individual monthly calls. 2-10 HBW has also seen a standardization in their data from the use of call log templates, leading to improved KPI tracking.

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## Summary

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## The Challenge

The insurance industry is highly competitive. For 2-10 Home Buyers Warranty, although the quantity of calls placed isn't the only metric of success, it's one they believe directly correlates to revenue. They wanted a way to increase their outbound sales agents' calls and also make it easier for them to do their jobs. A secondary requirement was a way to track their activities.

Since time spent off the phones figuring out processes or troubleshooting is time lost for sales, 2-10 HBW was also looking for a solution that is both easy to use and easy to implement. They began looking for a computer telephony integration (CTI) solution that would bring their call data into their Salesforce CRM.

*"The most important thing is time spent on the phone. We need the reps to be 100% focused on what they're saying, not tied up in the little details."*

**– Ya Yun Chan**

Resale Integrated Sales Manager  
2-10 Home Buyers Warranty



# 2-10 Home Buyers Warranty needed a CTI that would allow their reps to focus on placing calls.

## Background

2-10 Home Buyers Warranty is an insurance company that provides comprehensive homeowner's coverage for systems and appliances, as well as structural warranties for new home builds. The company operates with the philosophy "long live happy homes" and is also in the business of promises kept, something they achieve by providing reliable, knowledgeable service to their customers.

Their outbound sales agents spend most of their time on the phones building relationships and sourcing new clients. 2-10 HBW customers can be divided into two categories of homeowner's coverage: new homes and resale homes.

The 2-10 HBW resale inside sales team works with real estate agents who are dealing with transactions on resale homes. The team spends most of their day making outbound calls to both existing partners and new prospects.

## The Ingenius Solution

2-10 Home Buyers Warranty needed a CTI solution that would allow their reps to focus on placing calls and making connections, without a steep learning curve. Though they did consider two other solutions, 2-10 HBW chose InGenius because of its simplicity. InGenius provided an easy way to increase call capacity, standardize calls and track activities for both individuals and teams.

*"We love InGenius. It's so much easier than manual dialing when we would only do 20 calls per day. Now we do up to 100."*

**– Ya Yun Chan**

Resale Integrated Sales Manager  
2-10 Home Buyers Warranty

# InGenius helped 2-10 Home Buyers Warranty make connections and meet their targets.

**Individual monthly calls increased from 400 to 1,500 and 2-10 HBW reported a total of 27,000 activities logged in Salesforce.**

## Increased Productivity

Before InGenius, agents were only able to make about 20 calls a day. Now they can make 100+, with the bonus of increased accuracy. When reps were hand dialing, they had to dial 12 digits at a time and they would misdial 1 out of every 5 phone numbers. Now, reps just click on any phone number and it dials for them in one click, with no risk of misdialing. The team can work through their list more quickly and accurately.

InGenius also brought all call data into one place. Now, reps don't need to go to different folders or switch windows to find what they're looking for. The easier it is for each agent to do their job, the more they can optimize their performance and ease the frustration that comes with difficult processes.

## Standardization

2-10 Home Buyers Warranty customized their call log templates to drop reps' scripts into the notes field with the click of a button. This gives them quick and easy access to their talking points to make sure they hit them every time, and provides a record of exactly what was left in voicemails.

At 2-10 HBW, the inside sales team shares their leads with the field sales reps. Standardizing the call log notes allows them to present notes in a uniform professional way, instead of using shorthand and phrases that differ from rep to rep, which might need to be deciphered. Using call log templates has also reduced the amount of time call wrap-up takes, while improving quality.

## KPI Tracking

2-10 Home Buyers Warranty builds reports that break down the number of calls received, how

many messages they leave, how many live voices they reach and what the dispositions of each call are. At the end of the day, the numbers are important, but it's what the reps are saying to customers that makes the difference. Having reports on items like call dispositions has made it easier for management to coach their teams and refine their pitches.

The resale inside sales team has 3 major KPIs: the number of calls made and what they log in Salesforce, the number of sales, and the number of conversions – first-time agents – they close. Each team member now lives off of their own Salesforce dashboard that shows them their 2 most important metrics: number of sales and activities. This makes it easy for them to stay on top of their commission goals or adjust their day as needed.

## Results for 2-10 Home Buyers Warranty

**4X**

**increase**

in individual monthly calls

**27,000**

**activities**

logged in Salesforce

**Upland InGenius** helps organizations increase agent productivity and earn happier customers with a seamless connection between leading telephony systems and CRMs. Equip your service, sales, and ITSM teams with the tools they need to deliver more personalized service at scale today!

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