



Making Your Business Run Better

# Analysing Sales Data

An outline of what is capable using bxp

This report contains no customer, client or agent personally identifiable information.

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## 1 Overview

This document provides the findings and observations of the bxp operations team with regard to the operation of an insurance sales lead campaign. This sample data and reporting is an example of what can be done using bxp.

Within the examples, lines in italics show how to navigate bxp to generate the report for a campaign / program you may be running yourself at the moment. e.g.

*Main Menu > Data Profiling > Instant - Statistics > Statistics - Data - Report by Period > Your Campaign [X] for the "All" period*

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### **3 Situation Description**

Company XYZ sells products and insurance both online and through their stores nationwide. A contact centre backs up the operation to perform follow up on insurance leads from the stores.

The contact centre operations looking after the insurance sales have not been delivering the performance results expected and some analysis is required to identify the how and whys of what is going on.

There are also a number of external factors which are having significant bearing on the results. These issues have been highlighted and confirmed by the operations delivery team.

#### **Operational issues**

- The quality of the lead data being entered by the stores is not currently being closely supervised.
- The primary focus / reinforcement of sales message is not the selling of insurance but high value in store products.
- The stores is not delivering against initially projected volume or quality of insurance leads

#### **Follow up contact issues**

- The performing of the outbound follow up calls is not currently being closely supervised.



## 4 Initial Figures

There are at the time of the report 21:44:15 on 13<sup>th</sup> June 20xx

1526 actual data records

7137 contact records

This implies an average 6 contacts with every record, which is not feasible.

*Main Menu > Data Profiling > Instant Dashboards > Dashboard – System Information > Insurance Lead Generation - Operations [8] >*

### Campaign ID: 8

Data records				
Data Rows	Data size	Index size	Created	Max Record Id
1526	0.37 Mb (378.34 Kb)	0.16 Mb (163.00 Kb)	20xx-05-20 15:37:26	3792

Contact records				
Data Rows	Data size	Index size	Created	Max Record Id
7137	1.92 Mb (1,965.63 Kb)	1.51 Mb (1,542.00 Kb)	20xx-03-10 12:47:19	7159

Outcomes				
Data Rows	Data size	Index size	Created	Max Record Id
17	0.01 Mb (5.51 Kb)	0.01 Mb (6.00 Kb)	20xx-03-10 12:47:18	17

This meant that there was inaccurate data / orphan records in the campaign which needed removing as they can affect counts and totals. This was from historically poor record management

*Main Menu > Form Management > Form – Form and Data Deletion > Data Deletion – Remove redundant / orphan contact records > Insurance Lead Generation - Operations [8] >*



Another snapshot was then taken showing:

**Campaign ID: 8**

Data records

Data Rows	Data size	Index size	Created	Max Record Id
1485	0.37 Mb (378.34 Kb)	0.16 Mb (163.00 Kb)	20xx-05-20 15:37:26	3792

Contact records

Data Rows	Data size	Index size	Created	Max Record Id
4874	1.92 Mb (1,965.63 Kb)	1.51 Mb (1,542.00 Kb)	20xx-03-10 12:47:19	7159

Outcomes

Data Rows	Data size	Index size	Created	Max Record Id
17	0.01 Mb (5.51 Kb)	0.01 Mb (6.00 Kb)	20xx-03-10 12:47:18	17

This implies an average 4 contacts with every record, which is feasible.

The data was then eyeballed to ensure that the records were not lost in the process. Only duff and testing data was removed.

This however could mean that there was incomplete data in early reporting weeks. 41 data records were removed for having no contacts associated with them. The external logging process adds a contact record so no valid record can exist without at least 1 contact.



## 5 Outcomes

Tabulating the outcomes we start with

Id	Description	Type	Grouping 1	Grouping 2
1	External Logging - First Outcome	Incomplete	Initial Logging	
2	Update Details	Incomplete	Contact Made	In Progress
3	External Website - Customer opt out of marketing	Complete		
4	01 - No contact - No phone number	Complete		
5	01 - No contact - Disconnected tone	Complete		
6	01 - No contact - No Answer	Incomplete	Worked Lead	
7	01 - No contact - Voicemail	Incomplete	Worked Lead	
8	01 - No contact - Wrong number	Complete		
9	01 - No contact - Flagged exception	Complete	Worked Lead	
10	02 - Contact - No memory - Do not call again	Complete	Worked Lead	
11	02 - Contact - Call back later - Morning	Incomplete	Worked Lead	
12	02 - Contact - Call back later - Afternoon	Incomplete	Worked Lead	
13	02 - Contact - Call back later - Evening	Incomplete	Worked Lead	
14	02 - Contact - Call back later - Personal	Incomplete	Worked Lead	
15	02 - Contact - Interested - Call back	Incomplete	Worked Lead	
16	03 - Contact - Not Interested	Complete	Opportunity to Sell	
17	03 - Contact - Sale	Complete	Opportunity to Sell	

We then pull the

*Main Menu > Data Profiling > Instant - Statistics > Statistics - Data - Report by Period > Insurance Lead Generation - Operations [8] for the "All" period.*



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### Period Report

From 2000-01-01 00:00:00  
To 2024-01-01 00:00:00  
Report Generated 20xx-06-13 22:33:14

	Date / Outcome	Period Total
01 - No contact - Disconnected tone		0 0.0%
01 - No contact - Flagged exception		1 0.3%
01 - No contact - No Answer		54 18.7%
01 - No contact - No phone number		0 0.0%
01 - No contact - Voicemail		78 27.0%
01 - No contact - Wrong number		7 2.4%
02 - Contact - Call back later - Afternoon		3 1.0%
02 - Contact - Call back later - Evening		6 2.1%
02 - Contact - Call back later - Morning		1 0.3%
02 - Contact - Call back later - Personal		44 15.2%
02 - Contact - Interested - Call back		28 9.7%
02 - Contact - No memory - Do not call again		3 1.0%
03 - Contact - Not Interested		33 11.4%
03 - Contact - Sale		7 2.4%
External Website - Customer opt out of marketing		20 6.9%
External Logging - First Outcome		4 1.4%
Update Details		0 0.0%
<b>Total</b>		<b>289</b>

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The data reports 4874 contacts but the report shows only 289 records.

So we look at the raw data.

Main Menu > Data Profiling > Instant - Data > Data - Data - Report by Period, by Outcome > Insurance Lead Generation - Operations [8] for the "All" period > All outcomes > All fields >

The report took 60 seconds to generate.

There are 4874 rows in the data output

- 289 289 outcomes as listed above were found
- 3239 3239 records are "CENTRAL DATA - Customer Opt Out"
- 1341 1341 records are "External Logging - Public Outcome"
- 3 Record 49 was "Taken on Lookup" 3 times
- 2 Record 50 and 51 were "Taken to Process"

=====

4874 So all contacts are accounted for.

"CENTRAL DATA - Customer Opt Out" and "External Logging - Public Outcome" are system process outcomes which shouldn't be available to agents to use, but are needed for auditing purposes.

Taken on Lookup and Taken to Process indicate records that were looked at but not finished properly. Record Id 49, 50 and 51 are the ones that need to be tidied up.



So reworking the outcomes the settings were updated on each outcome

Id	Description	Type	Grouping 1	Grouping 2
1	External Logging - First Outcome	Incomplete	System	System
2	Update Details	Incomplete	System	System
3	External Website - Customer opt out of marketing	Complete	System	System
4	01 - No contact - No phone number	Complete	Worked Lead	No Contact
5	01 - No contact - Disconnected tone	Complete	Worked Lead	No Contact
6	01 - No contact - No Answer	Incomplete	Worked Lead	No Contact
7	01 - No contact - Voicemail	Incomplete	Worked Lead	No Contact
8	01 - No contact - Wrong number	Complete	Worked Lead	No Contact
9	01 - No contact - Flagged exception	Complete	Worked Lead	No Contact
10	02 - Contact - No memory - Do not call again	Complete	Worked Lead	Contact
11	02 - Contact - Call back later - Morning	Incomplete	Worked Lead	Contact
12	02 - Contact - Call back later - Afternoon	Incomplete	Worked Lead	Contact
13	02 - Contact - Call back later - Evening	Incomplete	Worked Lead	Contact
14	02 - Contact - Call back later - Personal	Incomplete	Worked Lead	Contact
15	02 - Contact - Interested - Call back	Incomplete	Worked Lead	Contact
16	03 - Contact - Not Interested	Complete	Opportunity to Sell	Contact
17	03 - Contact - Sale	Complete	Opportunity to Sell	Contact

So with the grouping redone, we now have a look operationally at our records.

*Main Menu > Data Profiling > Instant Dashboards > Dashboard – Record Status > Insurance Lead Generation - Operations [8] >*



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Form : Insurance Lead Generation - Operations  
 The current working Outcome is : External Logging - Public Outcome  
 The current working attempt is : 1  
 The earliest activity in this campaign is : 20xx-04-09 15:43:42  
 The most recent activity in this campaign is : 20xx-06-13 17:17:10

Outcome	0 attempts	1 attempts	2 attempts	3 attempts	4+ attempts	Subtotal
<b>Incomplete Outcomes</b>						
01 - No contact - No Answer	0	0	8	8	16	32
01 - No contact - Voicemail	0	0	14	3	9	26
02 - Contact - Call back later - Evening	0	0	2	0	0	2
02 - Contact - Call back later - Personal	0	0	10	4	0	14
02 - Contact - Interested - Call back	0	0	10	2	1	13
External Logging - Public Outcome	0	1331	0	0	0	1331
Taken on lookup	0	0	0	0	1	1
Taken to process	0	0	2	0	0	2
<b>Subtotal</b>	<b>0</b>	<b>1331</b>	<b>46</b>	<b>17</b>	<b>27</b>	<b>1421</b>
<b>Finished Outcomes</b>						
01 - No contact - Flagged exception	0	0	0	0	1	1
01 - No contact - Wrong number	0	0	5	0	0	5
02 - Contact - No memory - Do not call again	0	0	2	0	0	2
03 - Contact - Not Interested	0	0	21	2	8	31
03 - Contact - Sale	0	0	1	0	4	5
External Website - Customer opt out of marketing	0	20	0	0	0	20
<b>Subtotal</b>	<b>0</b>	<b>20</b>	<b>29</b>	<b>2</b>	<b>13</b>	<b>64</b>
<b>Total</b>	<b>0</b>	<b>1351</b>	<b>75</b>	<b>19</b>	<b>40</b>	<b>1485</b>

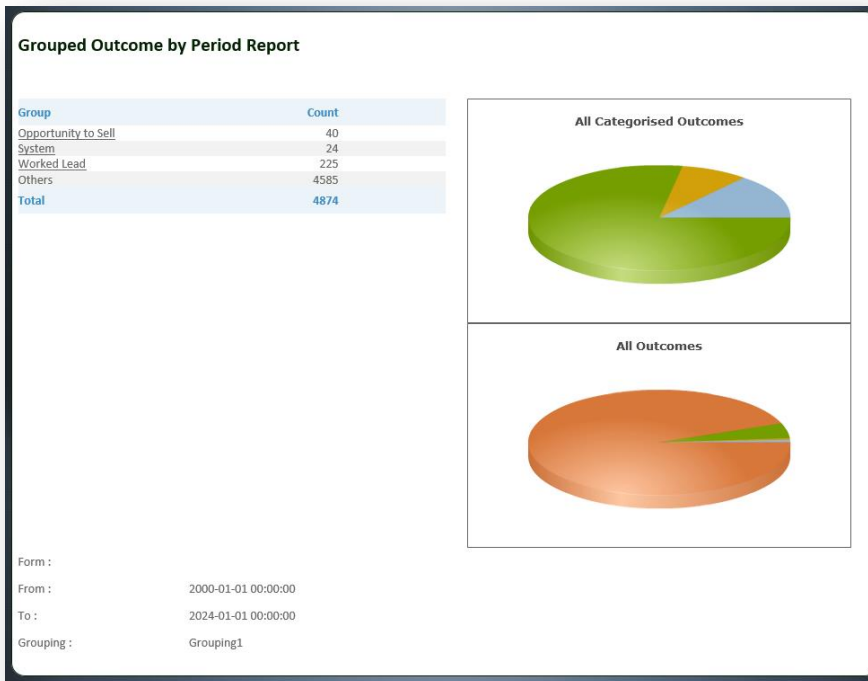
So from this report there are 1331 fresh records to be potentially contact in the database.



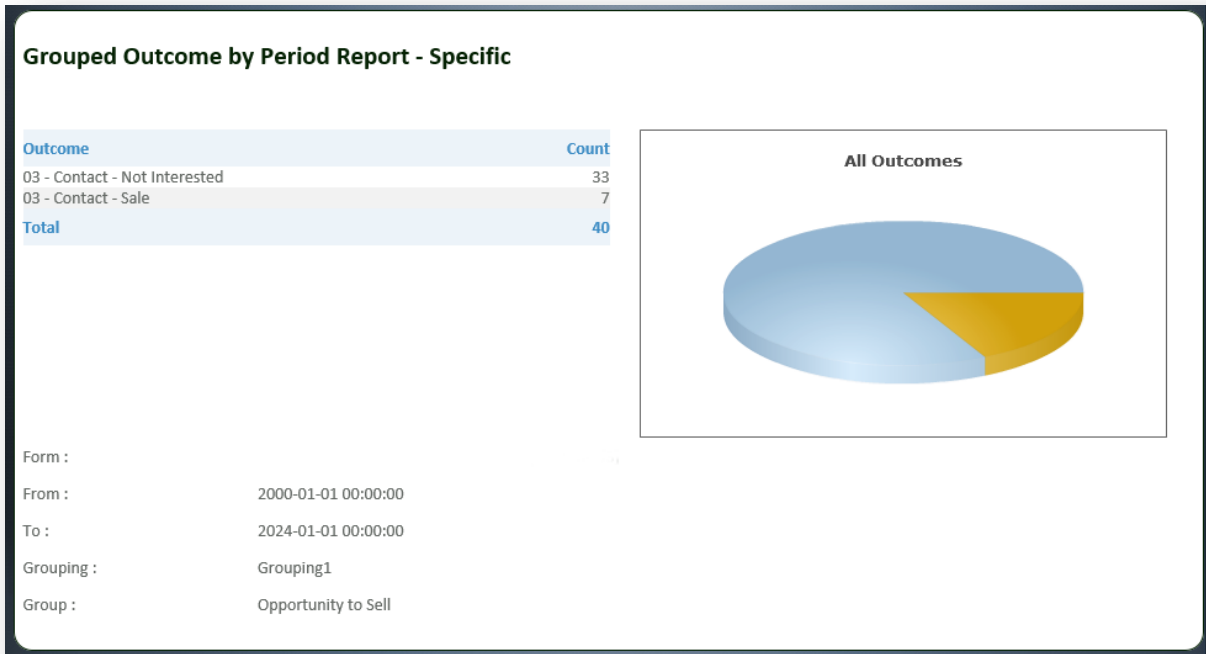
75 + 19 + 40 = 134 customers have been contacted so far.

Now we want to have a bit of a closer look at the break down of those outcomes

*Main Menu > Data Profiling > Instant - Statistics > Statistics - Grouped Outcome - Report by Period > Insurance Lead Generation - Operations [8] for the "All" period using Grouping 1*



We are interested where the Opportunity to Sell existed, the rest is chaff.



So for all of the legitimate contacts with customers, 17.5% conversion rate

For objectivity on cold call selling:

<http://www.searchmarketingstandard.com/what-is-the-average-conversion-rate>

10% for Professional or Financial Services. That's a cold call.

On a warm lead you would expect a lot higher, so we need to analyse those 33.

Considerations for support of this process can be read at

<http://marketingwisdom.com/strategies/conversion>

<http://www.inboundsales.net/blog/bid/38074/How-to-Convert-Marketing-Leads-to-Sales>



## 6 Analysing Opportunities to Sell

So we want to analyse these Not Interested. Why after all this work do we not have sales from them?

*Main Menu > Data Profiling > Instant - Data > Data - Data - Report by Period, by Outcome > Insurance Lead Generation - Operations [8] for the "All" period > Only tick "03 - Contact - Not Interested" > All fields >*

Contact Date Time	Id	Comment	
09/05/20xx 11:29	2488	staying with current supplier. changed her mind	Male Agent 1
12/05/20xx 11:07	2482	Customer not interested	Male Agent 1
20/05/20xx 14:13	2624	Customer insurance was due last week .. He got a good Price and went with his renewal	Male Agent 1
22/05/20xx 10:15	2779	Customer has his insurance with a broker and was happy to stay with them	Male Agent 1
27/05/20xx 14:10	2771	customer is selling her home .. Not interested in a quote	Male Agent 1
03/06/20xx 11:28	2873	Renewed with his current insurance co.	Female Agent 1
04/06/20xx 12:06	2880	not Interested	Male Agent 1
04/06/20xx 17:35	2996	Decline: Cust. began quote but he disclosed that he is a professional artist that works from home, spoke to her and she informed me that we would not be able to cover him. Customer very irate and said he had plenty of money and would pull all of his accounts with us and by threatening that he would get cover and that we would change our rules!	Female Agent 1
04/06/20xx 17:42	2912	Unfortunately the renewal date was the 31/5 so it automatically renewed itself so is going to stay with the current insurer this year	Female Agent 1
06/06/20xx 13:38	2833	Customer said it was too much hassle to avail of the guarantee to beat offer and was going to stay with his current insurer and did not seem fussed on our offer!	Female Agent 1
06/06/20xx 16:06	2874	Spoke to customer he said he advised our company that he already had home insurance with us could not understand why we would call him as he had already advised this.	Female Agent 1
06/06/20xx 16:42	2832	Customer said her renewal was earlier than she advised in store and that her husband renewed it. Customer said she didnt answer previously as she thought the dialling number was a scam number.	Female Agent 1
09/06/20xx 12:10	2900	going to stay with the company she is with at the moment	Male Agent 1
09/06/20xx 12:11	2468	going to stay with the company she is with at the moment	Male Agent 1



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Contact Date Time	Id	Comment	
09/06/20xx 12:28	2948	Renewed already	Female Agent 1
09/06/20xx 14:50	2949	Customer said when she was in a store and she asked for a call that day as her insurance was up then. April is her renewal date not June .	Female Agent 1
10/06/20xx 13:06	2952	renewal is next January 2015	Male Agent 1
10/06/20xx 16:11	2969	not interested just took out insurance last month	Male Agent 1
11/06/20xx 16:10	2805	Insurance not due up and will call us when its due	Male Agent 1
11/06/20xx 16:20	2728	not interested	Male Agent 1
11/06/20xx 16:23	2869	customer renewed a few months back and will call us when its due	Male Agent 1
11/06/20xx 16:28	2990	Her husband looks after the insurance and he will call us up	Male Agent 1
12/06/20xx 14:00	2906	Declined	Female Agent 1
12/06/20xx 14:05	2906	Declined	Female Agent 1
12/06/20xx 16:04	2993	Renewal was up in May.	Female Agent 1
12/06/20xx 16:06	3010		Female Agent 1
12/06/20xx 16:18	3018	Customer does not have home insurance and does not need it.	Female Agent 1
12/06/20xx 16:21	3021	Customer's renewal was up on the 10th June and renewed it straight away.	Female Agent 1
13/06/20xx 12:06	2917		Female Agent 1
13/06/20xx 14:39	3047		Female Agent 1
13/06/20xx 14:51	3079	Customer said she does not need it at the moment but will call us if she wants to get a quote explained the offer to mention it when she does ring him, customer happy with the information.	Female Agent 1

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From reading the comments a number of things become immediately apparent.

Too expensive?

So how much are the competition offering it for?

Who are they going with?

Staying?

What do they do better?

How could we make it simpler for them to change?

Not Interested?

How did they end up in the system if not interested at all? Operation issue?

Already renewed?

How did we not get to them in time? Have a look at 3021, from the raw data they were added to the system on the 14<sup>th</sup> May they were called 10<sup>th</sup> June.

Renewal date was set at 6/20xx!

With so few records, each record could be traced back to find out the source details using the total data as extracted earlier.



So currently we have how many records that potentially up for renewal this month that we might miss.

Main Menu > Data Profiling > Customised – Data > Customised - Data - All Contacts - By Group > Insurance Lead Generation - Operations [8] > 19 Lead Due List Administrator > All >

Status	Last viewed on	Comments	Views	Day	Month	Year
01 - No contact - Voicemail	16/04/20xx 17:39	5 attempts made no answer. left voicemail	7	17	5	20xx
03 - Contact - Not Interested	17/04/20xx 11:52	staying with current supplier changed her mind	2	18	5	20xx
01 - No contact - Voicemail	17/04/20xx 12:10	Have left 2 more voice mails.. 5 attempts made. 20/05/20xx	5	18	5	20xx
01 - No contact - Voicemail	17/04/20xx 11:44	5 attempts made no answer	6	19	5	20xx
03 - Contact - Not Interested	17/04/20xx 11:45	Customer not interested	3	19	5	20xx
01 - No contact - Voicemail	17/04/20xx 11:48	5 attempts made no answer. left voicemail	6	19	5	20xx
01 - No contact - Voicemail	17/04/20xx 10:38	LEFT VOICEMAIL	6	20	5	20xx
02 - Contact - Call back later - Personal	17/04/20xx 11:51	Ring customer back the end of june .. insurance due in july	3	20	5	20xx
01 - No contact - No Answer	17/04/20xx 12:11	No answer Last Call	6	20	5	20xx
02 - Contact - Call back later - Personal	17/04/20xx 11:50	call back in oct for quote.. 12/5/20xx 3:51pm	2	22	5	20xx
01 - No contact - No Answer	22/04/20xx 16:18	No answer Last Call	5	23	5	20xx
01 - No contact - No Answer	17/04/20xx 11:55	No answer Last Call	6	25	5	20xx
01 - No contact - No Answer	17/04/20xx 11:47	No answer Last Call	4	28	5	20xx
01 - No contact - No Answer	25/04/20xx 10:42	No answer Last Call to customer	3	28	5	20xx
03 - Contact - Sale	25/04/20xx 14:57	REF NT51087149	5	30	5	20xx
03 - Contact - Not Interested	28/04/20xx 10:08	Customer insurance was due last week .. He got a good Price and went with his renewal	2	30	5	20xx
01 - No contact - No Answer	29/04/20xx 15:57	No answer Last Call	3	30	5	20xx
01 - No contact - No Answer	30/04/20xx 12:57	No answer Last Call to customer	5	31	5	20xx
03 - Contact - Not Interested	16/04/20xx 14:32	Customer was already with us and when she got her Renewal the other day it was to expensive so they went else where..	2	1	6	20xx
01 - No contact - No Answer	16/04/20xx 15:49	No answer Last Call to customer	5	1	6	20xx
02 - Contact - Call back later - Personal	16/04/20xx 15:56	Call back tue the 3rd for a Quote	3	1	6	20xx
03 - Contact - Sale	29/04/20xx 15:58	Customer just took up a Policy last month	2	1	6	20xx
01 - No contact - Voicemail	30/04/20xx 11:25	Last call voicemail left	5	1	6	20xx
02 - Contact - Call back later - Personal	30/04/20xx 16:20	Insurance not Due till oct Call back her Husband Frank after 6 on his mobile	2	1	6	20xx



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01 - No contact - No Answer	30/04/20xx 16:21	No answer Last Call	4	1	6	20xx
01 - No contact - Wrong number	30/04/20xx 16:27	WRONG NUMBER	2	1	6	20xx
02 - Contact - Call back later - Personal	30/04/20xx 16:28	NOT DUE TILL OCT SO WANTS A CALL MID SEPT	2	1	6	20xx
01 - No contact - No Answer	30/04/20xx 16:34	No answer Last Call	4	1	6	20xx
02 - Contact - Interested - Call back	30/04/20xx 16:38	Quote done need to call back june the 11	4	1	6	20xx
02 - Contact - Call back later - Personal	01/05/20xx 11:15	CALL BACK MID JUNE FOR A QUOTE	2	1	6	20xx
01 - No contact - No Answer	01/05/20xx 11:20	no answer	4	2	6	20xx
03 - Contact - Not Interested	11/06/20xx 16:20	not interested	4	2	6	20xx
03 - Contact - Sale	01/05/20xx 16:10	SALE	4	2	6	20xx
01 - No contact - No Answer	01/05/20xx 16:17		5	2	6	20xx
01 - No contact - Wrong number	01/05/20xx 17:30	WRONG NUMBER	2	2	6	20xx
01 - No contact - No Answer	02/05/20xx 16:38	Final Call no answer	4	2	6	20xx
03 - Contact - Not Interested	02/05/20xx 16:39	Customer has his insurance with a broker and was happy to stay with them	2	2	6	20xx
03 - Contact - Not Interested	17/04/20xx 10:08	going to stay with the company she is with at the moment	5	3	6	20xx
01 - No contact - Voicemail	22/04/20xx 17:05		3	3	6	20xx
01 - No contact - Voicemail	02/05/20xx 14:21	voice mail left fri 30/5 and 03/6	3	3	6	20xx
03 - Contact - Not Interested	02/05/20xx 16:28	customer is selling her home .. Not interested in a quote	2	3	6	20xx
01 - No contact - No Answer	02/05/20xx 16:30		5	3	6	20xx
01 - No contact - Voicemail	02/05/20xx 16:32	Final Call	4	3	6	20xx
01 - No contact - Voicemail	17/04/20xx 10:19	left voice mails	3	5	6	20xx
03 - Contact - Sale	12/06/20xx 11:50		6	7	6	20xx
01 - No contact - No Answer	06/05/20xx 15:22	no vm	2	8	6	20xx
01 - No contact - Voicemail	07/05/20xx 17:22	left voicemail	2	8	6	20xx
01 - No contact - Voicemail	30/04/20xx 16:19	left voicemail	2	9	6	20xx
01 - No contact - Voicemail	03/05/20xx 10:47	left voicemail	2	9	6	20xx
01 - No contact - Wrong number	08/05/20xx 10:26	Nothing happening when dialing number	2	9	6	20xx
02 - Contact - Call back later - Personal	08/05/20xx 13:29	Wants a call back tomorrow	3	9	6	20xx
01 - No contact - No Answer	08/05/20xx 13:30		5	9	6	20xx
03 - Contact - Sale	12/06/20xx 10:39		4	9	6	20xx
03 - Contact - Not Interested	08/05/20xx 15:37	Spoke to customer he said he advised another agent that he already had home insurance with us could not understand why we would call him as he had already advised this.	6	9	6	20xx
03 - Contact - Not Interested	08/05/20xx 17:05	not Interested	2	9	6	20xx
01 - No contact - No Answer	07/05/20xx	Final Call no answer	5	10	6	20xx

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		15:47					
03 - Contact - Not Interested	07/05/20xx	15:47	Customer said her renewal was earlier than she advised in store and that her husband renewed it. Customer said she didnt answer previously as she thought the dialling number was a scam number.	5	10	6	20xx
03 - Contact - Not Interested	07/05/20xx	15:48	Customer said it was too much hassle to avail of the guarantee to beat offer and was going to stay with his current insurer and did not seem fussed on the offer!	4	10	6	20xx
03 - Contact - Not Interested	08/05/20xx	15:36	Renewed with his current insurance co.	2	10	6	20xx
01 - No contact - No Answer	09/05/20xx	11:00	Another agent called customer twice and there was n/a.	3	10	6	20xx
02 - Contact - Interested - Call back	09/05/20xx	11:55		2	10	6	20xx
03 - Contact - Not Interested	09/05/20xx	11:57	going to stay with the company she is with at the moment	4	10	6	20xx
01 - No contact - Voicemail	09/05/20xx	11:57	Voicemail left	2	10	6	20xx
01 - No contact - No Answer	09/05/20xx	11:59	No contact no voicemail 4/6/20xx	2	10	6	20xx
01 - No contact - No Answer	09/05/20xx	12:00	Customer seem to be out of the country as Phone is not ringing Properly will try again ..	2	10	6	20xx
02 - Contact - No memory - Do not call again	09/05/20xx	12:01	Duplicate record	2	10	6	20xx
03 - Contact - Not Interested	12/06/20xx	14:05	Declined	6	10	6	20xx
01 - No contact - No Answer	09/05/20xx	15:15	4th attempt	4	10	6	20xx
01 - No contact - No Answer	12/06/20xx	14:40	Final attempt	5	10	6	20xx
01 - No contact - No Answer	09/05/20xx	15:19	Another agent tried calling twice once on the first night and another the following night. 4th attempt	3	10	6	20xx
03 - Contact - Not Interested	09/05/20xx	15:23	Unfortunately the renewal date was the 31/5 so it automatically renewed itself so is going to stay with the current insurer this year	3	10	6	20xx
01 - No contact - No Answer	09/05/20xx	17:19	no answer no voicemail left	3	10	6	20xx
01 - No contact - Flagged exception	22/04/20xx	10:12	Rang back customer will call us if he wishes to proceed	5	12	6	20xx
03 - Contact - Not Interested	13/06/20xx	12:06		6	12	6	20xx
01 - No contact - Voicemail	23/04/20xx	17:20	5th attempt	5	13	6	20xx
02 - Contact - Interested - Call back	13/05/20xx	16:47	quote given, happy with price will call us back. No need for a callback.	3	13	6	20xx
03 - Contact - Not Interested	13/05/20xx	17:14	Decline: Cust. began quote but he disclosed that he is a professional artist that works from home, spoke to another agent and she informed me that we would not be able to cover him. Customer very irate and said he had plenty of money and would pull all of his accounts and by threatening that he would get cover and that we would change our rules!	2	13	6	20xx
01 - No contact - Voicemail	12/05/20xx	11:46	5th Attempt	5	14	6	20xx
02 - Contact - Call back later - Evening	13/05/20xx	10:44	Giving to another agent as callback required after 5pm!	2	14	6	20xx
03 - Contact - Not Interested	13/05/20xx	10:46	Renewed already	2	14	6	20xx

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03 - Contact - Not Interested	13/05/20xx 10:46	Customer said when she was in store with an agent she asked for a call that day as her insurance was up then. April is her renewal date not June .	2	14	6	20xx
01 - No contact - Voicemail	13/05/20xx 10:54		2	14	6	20xx
01 - No contact - No Answer	10/06/20xx 13:04	no answer no voicemail	2	14	6	20xx
03 - Contact - Not Interested	10/06/20xx 13:06	renewal is next January 2015	2	14	6	20xx
02 - Contact - No memory - Do not call again	10/06/20xx 13:09	Not Interested do not call back	2	14	6	20xx
02 - Contact - Call back later - Personal	10/06/20xx 13:17	Not due till November	2	14	6	20xx
01 - No contact - No Answer	10/06/20xx 14:55	ringing tone of someone abroad vm in foreign language.	2	14	6	20xx
01 - No contact - Voicemail	10/06/20xx 14:57		2	14	6	20xx
01 - No contact - Wrong number	10/06/20xx 15:00		2	14	6	20xx
02 - Contact - Call back later - Personal	10/06/20xx 15:39	call back tomorrow 11/6/20xx at 3:30pm	2	14	6	20xx
02 - Contact - Call back later - Personal	10/06/20xx 15:42	not due till September call him back then	2	14	6	20xx
01 - No contact - Voicemail	10/06/20xx 15:49	left voicemail	2	14	6	20xx
02 - Contact - Call back later - Personal	10/06/20xx 15:52	On holidays for another 2 weeks so call the 26/06/20xx	2	14	6	20xx
01 - No contact - Voicemail	10/06/20xx 15:55	Voicemail left ..	2	14	6	20xx
01 - No contact - No Answer	11/06/20xx 16:13	No Answer	3	14	6	20xx
02 - Contact - Call back later - Personal	10/06/20xx 16:01	**Nice customer Call back First week in oct for Quote**	2	14	6	20xx
03 - Contact - Not Interested	10/06/20xx 16:11	not interested just took out insurance last month	2	14	6	20xx
01 - No contact - Voicemail	10/06/20xx 16:15	left voicemail	2	14	6	20xx
02 - Contact - Call back later - Personal	10/06/20xx 16:21	Call back in Oct for Quote	3	14	6	20xx
01 - No contact - No Answer	10/06/20xx 16:23	No answer no voicemail left	2	14	6	20xx
01 - No contact - No Answer	10/06/20xx 16:26	Customer seem to be out of the Country phone went to Voicemail in a different language	2	14	6	20xx
02 - Contact - Call back later - Evening	10/06/20xx 16:31	Requested a callback after 6.30 emailed evening staff for one them to callback.	2	14	6	20xx
01 - No contact - No Answer	12/06/20xx 09:18	Rang twice and n/a	3	14	6	20xx
01 - No contact - No Answer	12/06/20xx 09:38	2nd attempt	3	14	6	20xx
01 - No contact - Voicemail	10/06/20xx 15:40		2	14	6	20xx
03 - Contact - Not Interested	11/06/20xx 16:10	Insurance not due up and will call us when its due	2	15	6	20xx
01 - No contact - Voicemail	11/06/20xx 16:15	voicemail left	2	15	6	20xx
01 - No contact - No Answer	11/06/20xx 16:17	Phone turned off	2	15	6	20xx
02 - Contact - Call back later - Personal	11/06/20xx 16:20	Call back friday afternoon	2	15	6	20xx
03 - Contact - Not Interested	11/06/20xx 16:23	customer renewed a few months back and will call us when its due	2	15	6	20xx
01 - No contact - Voicemail	11/06/20xx 16:25	left voicemail	2	15	6	20xx

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03 - Contact - Not Interested	11/06/20xx 16:28	Her husband looks after the insurance and he will call us up	2	15	6	20xx
02 - Contact - Interested - Call back	12/06/20xx 15:58	Df for three weeks time as her renewal is in July.	3	15	6	20xx
01 - No contact - Voicemail	12/06/20xx 16:01		2	15	6	20xx
03 - Contact - Not Interested	12/06/20xx 16:04	Renewal was up in May.	2	15	6	20xx
External Logging - Public Outcome	14/05/20xx 11:35		1	15	6	20xx
03 - Contact - Not Interested	12/06/20xx 16:06		2	15	6	20xx
02 - Contact - Interested - Call back	12/06/20xx 16:14	Passed to evening staff as she wanted a call after 5.30.	2	15	6	20xx
03 - Contact - Not Interested	12/06/20xx 16:18	Customer does not have home insurance and does not need it.	2	15	6	20xx
03 - Contact - Not Interested	12/06/20xx 16:21	Customer's renewal was up on the 10th June and renewed it straight away.	2	15	6	20xx
02 - Contact - Interested - Call back	12/06/20xx 16:24		2	15	6	20xx
02 - Contact - Interested - Call back	13/06/20xx 14:37	Df for next week	2	15	6	20xx
03 - Contact - Not Interested	13/06/20xx 14:39		2	15	6	20xx
02 - Contact - Interested - Call back	13/06/20xx 14:43	Customer not in will try again on Monday, left a message with her son.	2	16	6	20xx
01 - No contact - Voicemail	13/06/20xx 14:45		2	16	6	20xx
02 - Contact - Interested - Call back	13/06/20xx 14:48	Busy DF for Monday	2	16	6	20xx
03 - Contact - Not Interested	13/06/20xx 14:51	Customer said she does not need it at the moment but will call us if she wants to get a quote explained the offer to mention it when she does ring him, customer happy with the information.	2	16	6	20xx
01 - No contact - Wrong number	13/06/20xx 14:52		2	16	6	20xx
02 - Contact - Interested - Call back	13/06/20xx 14:55	Df for Monday	2	16	6	20xx
02 - Contact - Interested - Call back	13/06/20xx 15:25	quote complete DF 2nd week in July as his renewal is up in July.	2	16	6	20xx
02 - Contact - Interested - Call back	13/06/20xx 15:58	At a wedding DF for Monday.	2	16	6	20xx
02 - Contact - Interested - Call back	13/06/20xx 16:16	quote given: df Monday week if he has not contacted us.	2	16	6	20xx
External Logging - Public Outcome	15/05/20xx 15:37		1	16	6	20xx
External Logging - Public Outcome	15/05/20xx 16:52		1	16	6	20xx
External Logging - Public Outcome	15/05/20xx 16:53		1	16	6	20xx
External Logging - Public Outcome	15/05/20xx 16:54		1	16	6	20xx
External Logging - Public Outcome	15/05/20xx 16:55		1	16	6	20xx
External Logging - Public Outcome	16/05/20xx 16:14		1	16	6	20xx
External Logging - Public Outcome	15/05/20xx 11:45		1	17	6	20xx
External Logging - Public Outcome	16/05/20xx 11:12		1	17	6	20xx
External Logging - Public Outcome	17/04/20xx 12:57		1	18	6	20xx
External Logging - Public Outcome	17/05/20xx 11:34		1	18	6	20xx

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External Logging - Public Outcome	16/04/20xx 14:38	1	19	6	20xx
External Logging - Public Outcome	07/05/20xx 17:41	1	19	6	20xx
External Logging - Public Outcome	20/05/20xx 10:52	1	20	6	20xx
External Logging - Public Outcome	20/05/20xx 16:27	1	20	6	20xx
External Logging - Public Outcome	06/05/20xx 16:24	1	21	6	20xx
External Logging - Public Outcome	20/05/20xx 17:15	1	21	6	20xx
External Logging - Public Outcome	21/05/20xx 16:39	1	21	6	20xx
External Logging - Public Outcome	21/05/20xx 12:15	1	22	6	20xx
External Logging - Public Outcome	21/05/20xx 14:08	1	22	6	20xx
External Logging - Public Outcome	22/05/20xx 16:18	1	23	6	20xx
External Logging - Public Outcome	22/05/20xx 16:19	1	23	6	20xx
External Logging - Public Outcome	22/05/20xx 16:20	1	23	6	20xx
External Logging - Public Outcome	22/05/20xx 16:21	1	23	6	20xx
External Logging - Public Outcome	22/05/20xx 16:23	1	23	6	20xx
External Logging - Public Outcome	23/05/20xx 12:18	1	23	6	20xx
External Logging - Public Outcome	22/05/20xx 16:12	1	24	6	20xx
External Logging - Public Outcome	01/05/20xx 16:01	1	25	6	20xx
External Logging - Public Outcome	07/05/20xx 14:00	1	25	6	20xx
External Logging - Public Outcome	20/05/20xx 10:36	1	25	6	20xx
External Logging - Public Outcome	21/05/20xx 15:01	1	25	6	20xx
External Logging - Public Outcome	26/05/20xx 11:22	1	27	6	20xx
External Logging - Public Outcome	26/05/20xx 11:32	1	27	6	20xx
External Logging - Public Outcome	26/05/20xx 11:33	1	27	6	20xx
External Logging - Public Outcome	26/05/20xx 11:35	1	27	6	20xx
External Logging - Public Outcome	26/05/20xx 11:36	1	27	6	20xx
External Logging - Public Outcome	26/05/20xx 11:37	1	27	6	20xx
External Logging - Public Outcome	26/05/20xx 11:44	1	27	6	20xx
External Logging - Public Outcome	26/05/20xx 11:45	1	27	6	20xx
External Logging - Public Outcome	22/05/20xx 11:05	1	28	6	20xx
External Logging - Public Outcome	23/05/20xx 14:24	1	28	6	20xx
External Logging - Public Outcome	23/05/20xx 16:55	1	28	6	20xx
External Logging - Public Outcome	27/05/20xx 16:07	1	28	6	20xx
External Logging - Public Outcome	28/05/20xx	1	28	6	20xx

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Outcome	09:31				
External Logging - Public Outcome	28/05/20xx 18:03	1	28	6	20xx
External Logging - Public Outcome	20/05/20xx 09:02	1	29	6	20xx
External Logging - Public Outcome	21/05/20xx 11:08	1	29	6	20xx
External Logging - Public Outcome	28/05/20xx 09:17	1	29	6	20xx
External Logging - Public Outcome	30/04/20xx 12:04	1	30	6	20xx
External Logging - Public Outcome	02/05/20xx 14:13	1	30	6	20xx
External Logging - Public Outcome	02/05/20xx 16:24	1	30	6	20xx
External Logging - Public Outcome	07/05/20xx 10:02	1	30	6	20xx
External Logging - Public Outcome	09/05/20xx 11:08	1	30	6	20xx
External Logging - Public Outcome	13/05/20xx 11:45	1	30	6	20xx
External Logging - Public Outcome	14/05/20xx 16:27	1	30	6	20xx
External Logging - Public Outcome	15/05/20xx 14:13	1	30	6	20xx
External Logging - Public Outcome	16/05/20xx 10:45	1	30	6	20xx
External Logging - Public Outcome	16/05/20xx 10:46	1	30	6	20xx
External Logging - Public Outcome	19/05/20xx 11:40	1	30	6	20xx
External Logging - Public Outcome	19/05/20xx 11:42	1	30	6	20xx
External Logging - Public Outcome	19/05/20xx 13:12	1	30	6	20xx
External Logging - Public Outcome	21/05/20xx 11:04	1	30	6	20xx
External Logging - Public Outcome	22/05/20xx 16:09	1	30	6	20xx
External Logging - Public Outcome	26/05/20xx 11:02	1	30	6	20xx
External Logging - Public Outcome	28/05/20xx 15:16	1	30	6	20xx
External Logging - Public Outcome	29/05/20xx 10:21	1	30	6	20xx
External Logging - Public Outcome	29/05/20xx 14:05	1	30	6	20xx
External Logging - Public Outcome	29/05/20xx 16:03	1	30	6	20xx
External Logging - Public Outcome	29/05/20xx 16:04	1	30	6	20xx
External Logging - Public Outcome	30/05/20xx 09:46	1	30	6	20xx
External Logging - Public Outcome	30/05/20xx 09:48	1	30	6	20xx
External Logging - Public Outcome	30/05/20xx 09:52	1	30	6	20xx
External Logging - Public Outcome	30/05/20xx 09:54	1	30	6	20xx
External Logging - Public Outcome	30/05/20xx 09:55	1	30	6	20xx
External Logging - Public Outcome	30/05/20xx 16:22	1	30	6	20xx

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Immediately from this data we can see that it will be too late for some customers for the renewal. The call is occurring too close to potential renewal dates without being sure that the renewal date captured by the operation is accurate!

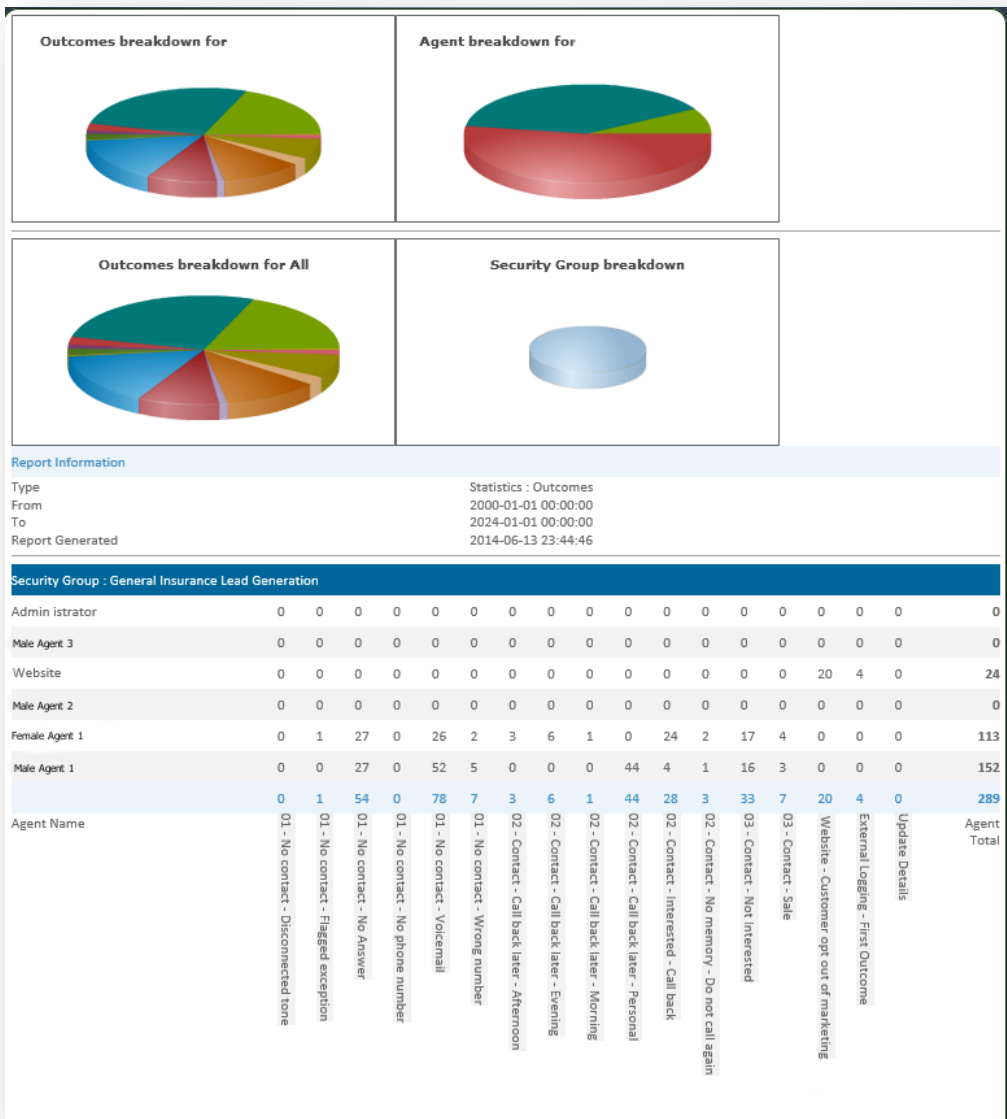
Also some records are being contact a lot of times before new leads are being contacted. This can lead to not getting around to records. This needs closer management.

The latter records are only being called in the afternoons, there are no morning calls. This seems to be as Female Agent 1 has taken over while Male Agent 1 is on holidays / unavailable.



So we want to have a look at how the two compare.

Main Menu > Data Profiling > Instant - Statistics > Statistics - User - Report by Period > "All" and "Insurance Lead Generation - Operations [8]" >



So for this campaign, Male Agent 1 has done 152 records and Female Agent 1 has done 113.



## 7 Timing

On the important outcomes of “03 - Contact – Sale” and “03 - Contact – Not Interested” Female Agent 1 seems to be getting through to a lot more people to get to a decision.

And as we have seen with Female Agent 1, a lot of her contacts are in the afternoon, so this might be a tactic worth employing for a week.

So timing becomes important. In the raw data from early on we have a column with duration.

We are interested in the 03 – Contact – Sale

23/05/20xx 15:29	2603	03 - Contact - Sale	Male Agent 1	0 Days 00:00:40
21/05/20xx 16:02	2674	03 - Contact - Sale	Male Agent 1	0 Days 00:22:02
28/05/20xx 14:38	2739	03 - Contact - Sale	Male Agent 1	0 Days 00:00:55
29/05/20xx 20:02	2794	03 - Contact - Sale	Female Agent 1	0 Days 00:21:24
04/06/20xx 11:22	2794	03 - Contact - Sale	Female Agent 1	0 Days 00:01:34
12/06/20xx 11:50	2794	03 - Contact - Sale	Female Agent 1	0 Days 00:00:26
12/06/20xx 10:39	2864	03 - Contact - Sale	Female Agent 1	0 Days 00:00:13

So from this we can see that three uses of the same outcome by Female Agent 1 has exaggerated her sales score. She only has 2 unique customer sales, but has used the outcome 4 times.

Looking at Male Agent 1’s sales... how can you do a sale in 40 seconds and 55 seconds?



Next we have a look at the 03 - Contact - Not Interested

21/05/20xx 11:37	2443	03 - Contact - Not Interested	Male Agent 1	0 Days 00:04:21
03/06/20xx 12:27	2446	01 - No contact - No Answer	Male Agent 1	0 Days 00:00:19
09/06/20xx 12:11	2468	03 - Contact - Not Interested	Male Agent 1	0 Days 00:00:36
12/05/20xx 11:07	2482	03 - Contact - Not Interested	Male Agent 1	0 Days 00:00:32
09/05/20xx 11:29	2488	03 - Contact - Not Interested	Male Agent 1	0 Days 00:05:15
20/05/20xx 14:13	2624	03 - Contact - Not Interested	Male Agent 1	0 Days 00:02:32
11/06/20xx 16:20	2728	03 - Contact - Not Interested	Male Agent 1	0 Days 00:00:25
27/05/20xx 14:10	2771	03 - Contact - Not Interested	Male Agent 1	0 Days 00:00:27
22/05/20xx 10:15	2779	03 - Contact - Not Interested	Male Agent 1	0 Days 00:02:18
11/06/20xx 16:10	2805	03 - Contact - Not Interested	Male Agent 1	0 Days 00:05:48
06/06/20xx 16:42	2832	03 - Contact - Not Interested	Female Agent 1	0 Days 00:16:37
06/06/20xx 13:38	2833	03 - Contact - Not Interested	Female Agent 1	0 Days 00:01:36
11/06/20xx 16:23	2869	03 - Contact - Not Interested	Male Agent 1	0 Days 00:02:17
03/06/20xx 11:28	2873	03 - Contact - Not Interested	Female Agent 1	0 Days 00:01:26
06/06/20xx 16:06	2874	03 - Contact - Not Interested	Female Agent 1	0 Days 00:03:08
04/06/20xx 12:06	2880	03 - Contact - Not Interested	Male Agent 1	0 Days 00:01:18
09/06/20xx 12:10	2900	03 - Contact - Not Interested	Male Agent 1	0 Days 00:06:24
12/06/20xx 14:00	2906	03 - Contact - Not Interested	Female Agent 1	0 Days 00:16:05
12/06/20xx 14:05	2906	03 - Contact - Not Interested	Female Agent 1	0 Days 00:00:48
04/06/20xx 17:42	2912	03 - Contact - Not Interested	Female Agent 1	0 Days 00:01:31
13/06/20xx 12:06	2917	03 - Contact - Not Interested	Female Agent 1	0 Days 00:03:15
09/06/20xx 12:28	2948	03 - Contact - Not Interested	Female Agent 1	0 Days 00:01:07
09/06/20xx 14:50	2949	03 - Contact - Not Interested	Female Agent 1	0 Days 00:03:21
10/06/20xx 13:06	2952	03 - Contact - Not Interested	Male Agent 1	0 Days 00:01:41
10/06/20xx 16:11	2969	03 - Contact - Not Interested	Male Agent 1	0 Days 00:00:42
11/06/20xx 16:28	2990	03 - Contact - Not Interested	Male Agent 1	0 Days 00:01:51
12/06/20xx 16:04	2993	03 - Contact - Not Interested	Female Agent 1	0 Days 00:02:17
04/06/20xx 17:35	2996	03 - Contact - Not Interested	Female Agent 1	0 Days 00:20:29
12/06/20xx 16:06	3010	03 - Contact - Not Interested	Female Agent 1	0 Days 00:01:22
12/06/20xx 16:18	3018	03 - Contact - Not Interested	Female Agent 1	0 Days 00:02:30
12/06/20xx 16:21	3021	03 - Contact - Not Interested	Female Agent 1	0 Days 00:03:13
13/06/20xx 14:39	3047	03 - Contact - Not Interested	Female Agent 1	0 Days 00:01:21
13/06/20xx 14:51	3079	03 - Contact - Not Interested	Female Agent 1	0 Days 00:02:18

Second record in, we see a misuse of an outcome, that we did have a contact of 03, but the record finished with Male Agent 1 using 01. This means we don't have enough correct outcomes, or he was using the system wrongly.



Now we sort by the duration column

03/06/20xx 12:27	2446	01 - No contact - No Answer	Male Agent 1	0 Days 00:00:19
11/06/20xx 16:20	2728	03 - Contact - Not Interested	Male Agent 1	0 Days 00:00:25
27/05/20xx 14:10	2771	03 - Contact - Not Interested	Male Agent 1	0 Days 00:00:27
12/05/20xx 11:07	2482	03 - Contact - Not Interested	Male Agent 1	0 Days 00:00:32
09/06/20xx 12:11	2468	03 - Contact - Not Interested	Male Agent 1	0 Days 00:00:36
10/06/20xx 16:11	2969	03 - Contact - Not Interested	Male Agent 1	0 Days 00:00:42
12/06/20xx 14:05	2906	03 - Contact - Not Interested	Female Agent 1	0 Days 00:00:48
09/06/20xx 12:28	2948	03 - Contact - Not Interested	Female Agent 1	0 Days 00:01:07
04/06/20xx 12:06	2880	03 - Contact - Not Interested	Male Agent 1	0 Days 00:01:18
13/06/20xx 14:39	3047	03 - Contact - Not Interested	Female Agent 1	0 Days 00:01:21
12/06/20xx 16:06	3010	03 - Contact - Not Interested	Female Agent 1	0 Days 00:01:22
03/06/20xx 11:28	2873	03 - Contact - Not Interested	Female Agent 1	0 Days 00:01:26
04/06/20xx 17:42	2912	03 - Contact - Not Interested	Female Agent 1	0 Days 00:01:31
06/06/20xx 13:38	2833	03 - Contact - Not Interested	Female Agent 1	0 Days 00:01:36
10/06/20xx 13:06	2952	03 - Contact - Not Interested	Male Agent 1	0 Days 00:01:41
11/06/20xx 16:28	2990	03 - Contact - Not Interested	Male Agent 1	0 Days 00:01:51
11/06/20xx 16:23	2869	03 - Contact - Not Interested	Male Agent 1	0 Days 00:02:17
12/06/20xx 16:04	2993	03 - Contact - Not Interested	Female Agent 1	0 Days 00:02:17
22/05/20xx 10:15	2779	03 - Contact - Not Interested	Male Agent 1	0 Days 00:02:18
13/06/20xx 14:51	3079	03 - Contact - Not Interested	Female Agent 1	0 Days 00:02:18
12/06/20xx 16:18	3018	03 - Contact - Not Interested	Female Agent 1	0 Days 00:02:30
20/05/20xx 14:13	2624	03 - Contact - Not Interested	Male Agent 1	0 Days 00:02:32
06/06/20xx 16:06	2874	03 - Contact - Not Interested	Female Agent 1	0 Days 00:03:08
12/06/20xx 16:21	3021	03 - Contact - Not Interested	Female Agent 1	0 Days 00:03:13
13/06/20xx 12:06	2917	03 - Contact - Not Interested	Female Agent 1	0 Days 00:03:15
09/06/20xx 14:50	2949	03 - Contact - Not Interested	Female Agent 1	0 Days 00:03:21
21/05/20xx 11:37	2443	03 - Contact - Not Interested	Male Agent 1	0 Days 00:04:21
09/05/20xx 11:29	2488	03 - Contact - Not Interested	Male Agent 1	0 Days 00:05:15
11/06/20xx 16:10	2805	03 - Contact - Not Interested	Male Agent 1	0 Days 00:05:48
09/06/20xx 12:10	2900	03 - Contact - Not Interested	Male Agent 1	0 Days 00:06:24
12/06/20xx 14:00	2906	03 - Contact - Not Interested	Female Agent 1	0 Days 00:16:05
06/06/20xx 16:42	2832	03 - Contact - Not Interested	Female Agent 1	0 Days 00:16:37
04/06/20xx 17:35	2996	03 - Contact - Not Interested	Female Agent 1	0 Days 00:20:29

Why does Female Agent 1 have rather long calls for going nowhere just after lunch, so we can go into those records and view the comments.



*Main Menu > Inbound Contact > My Data > Lookup an entry - For Edit > Insurance Lead Generation - Operations [8] > 2906 in the Id field > Select >> > Click "Contact History" > Open "03 - Contact - Not Interested 20xx-06-12 14:00:58 by Female Agent 1"*

Comment was:

*"Quote done but unfortunately it declined."*

So it takes 16 minutes to do a quote?

Repeat for 2832

*"Customer said her renewal was earlier than she advised in store and that her husband renewed it. Customer said she didn't answer previously as she thought the dialling number was a scam number."*

Repeat for 2996

*"Decline: Cust. began quote but he disclosed that he is a professional artist that works from home, spoke to another agent and she informed me that we would not be able to cover him. Customer very irate and said he had plenty of money and would pull all of his accounts with us and by threatening that he would get cover and that we would change our rules!"*

So all her long calls were with declined quotes, so it could be worth putting in another outcome to explicitly flag how much operational time is lost with calls that obviously take a lot longer to solve than Not Interested.



Making Your Business Run Better

## 8 Conclusion

bxp's suite of tools allows for very in-depth reporting and analysis. From these few examples there are a host of next steps, further investigation and obvious ways of improving this process.

Why not allow our team to help you make the most of your data and processes and start delivering the results you can get from your campaigns.

Please ring us on +353 1 429 4000 or email [sales@bxpsoftware.com](mailto:sales@bxpsoftware.com) now to see how we can help you.