

Instrument the Funnel End to End

Building a scalable outbound insurance sales engine through operational discipline, funnel instrumentation, and workflow redesign.

Executive Summary

A remote independent insurance brokerage was struggling with inefficient outbound workflows, inconsistent customer engagement, and agent overload. Internal data showed that lead conversion probability dropped sharply after four days, yet agents were still being tasked with calling leads for up to eight days. The result was operational drag without measurable revenue impact.

By redesigning the engagement strategy, implementing funnel instrumentation, standardizing communication workflows, and aligning agent activity to measurable conversion behavior, the operation scaled from 1,463 monthly leads to more than 7,100 monthly leads while significantly improving engagement and quote rates without proportional headcount growth.

While I am not publicly disclosing the company referenced in this paper, I would be happy to connect serious employers or partners with references who can validate the outcomes described herein.

The Problem

- Customer engagement timing
- Communication sequencing
- Funnel accountability
- Workload pacing
- Lead aging

Agents were receiving approximately 14 new leads per day, with automated follow up tasks stacking continuously for up to eight days. Agents spent a significant portion of their day working statistically low probability leads while higher value opportunities competed for attention.

At the same time, customer communication lacked a consistent voice and strategic intent. Automated texts and emails existed, but they were generic, poorly timed, and not optimized for engagement.

Operational Diagnosis

Using Domo dashboards connected to the company data warehouse, I built visibility into lead aging, engagement rate, quote rate, sales pacing, daily workload distribution, and conversion timing trends.

The data revealed a critical insight: customers who had not engaged within four days were highly unlikely to convert.

The issue was not effort. The issue was effort allocation.

System Design and Implementation

- Reducing non productive follow up activity
- Redesigning automated SMS and email workflows
- Implementing standardized communication voice and cadence
- Creating SLA monitoring for engagement and quote pacing
- Instrumenting funnel stages with measurable ownership

Using AgencyZoom and GPT assisted iteration, I rebuilt the automated communication strategy from the ground up. Messaging was rewritten to create clearer calls to action, faster engagement, and more consistent outreach quality across the organization.

I also implemented operational pacing metrics for daily engagements, quote rates, weekly sales targets, and lead aging compliance.

Results

- Monthly leads scaled from 1,463 to 7,109
- Engagement rates improved from 22% to 38%
- Quote rates of engaged customers increased from 26% to 33%
- Daily customer engagements increased from approximately 30 per day to 80 per day
- Weekly sales productivity increased from approximately 2 sales per week per agent to 2 sales per day per agent
- Staffing scaled from 3 agents to 9 agents while supporting nearly 10x policy volume growth

Most importantly, the organization increased operational throughput without linearly increasing headcount.

Key Takeaways

More activity does not equal more productivity.

When funnels are properly instrumented, organizations can identify where human effort creates value and where it creates noise.

Operational scale does not come from asking teams to work harder. It comes from aligning systems, pacing, and workflows around measurable customer behavior.