

Meet the Customer at the Signal

Using AI assisted outreach to convert abandoned intent into qualified sales conversations at scale.

Executive Summary

A large independent insurance brokerage generated approximately 200,000 inbound digital leads per month, with roughly 11% of prospective customers abandoning the purchase flow before completion.

I led the evaluation, selection, implementation, and operational design of an AI assisted outreach system that identified abandoned cart behavior, initiated customer engagement within minutes, and transferred qualified conversations directly to licensed sales agents.

The result was the creation of an entirely new conversion channel capable of generating an estimated 600 incremental monthly sales from previously unworked opportunities.

Key Results

- Estimated 600 additional monthly sales from abandoned cart recovery
- Improved speed to lead performance
- More warm qualified conversations routed to agents
- Improved conversion of high intent traffic
- Scalable customer engagement without proportional staffing increases