



Inactive Accounts Case Study
Tier 1 Carrier

November 2024

Case Study Overview

6-Month Inactive Account & Appointment Optimization Review

Objective

Improve inactive account reactivation, appointment setting efficiency, and lead quality through structured AI-driven account prioritization.

Scope

6-month deployment across defined test cohort.

Evaluation Includes

- Competitive data comparison (Citytwig vs ZoomInfo vs Data Axle)
- Appointment set ratio
- Lead quality indicators
- Conversion performance



Baseline & Competitive Test Design

Evaluation period: 6 months

Controlled Carrier Test

Trial Sample Size per Vendor: 155 records

Vendors Evaluated:

- Citytwig | Hulii
- ZoomInfo
- Data Axle

Measured Categories

- Appointment set rate
- Bad leads
- Duplicates
- No decision-making authority
- No contact
- No interest
- Carrier conflicts

MassMutual Competitive Landscape, AI Models (Carrier tests)

Category	Citytwig Results		ZoomInfo Count		Data Axle Count	
Trial Sample Size	155		155		155	
Appointment Set	15	10%	2	1.3%	1	0.6%
Bad Lead	0	0%	12	8%	81	52%
Called No Contact	10	0.06%	47	13%	90	58%
Duplicate	0	0%	17	11%	25	16%
Has Carrier	2	1.3%	27	17%	27	17%
Left Message	10	6.5%	30	19%	10	6.5%
No Decision Making	1	0.06%	56	23%	90	58%
No Employees	1	0.6%	33	21%	49	31%
No Interest	20	12.9%	57	36.7%	62	40%

Initial Highlights

10%

Appointment Conversion

0%

No Bad Leads

87%

Better Appointment Set Ratio

Performance

Appointment Setting

- Citytwig | Hulii delivered 7.7x more appointments than ZoomInfo
- Citytwig | Hulii delivered 15x more appointments than Data Axle
- 87% better appointment set ratio vs competitors

Lead Quality Comparison

- 0% bad leads with Citytwig
- Significantly fewer duplicate and non-decision-maker contacts
- Reduced recruiter waste and outreach inefficiency

Engagement & Contact Outcomes

- Higher engagement rates
- Lower “no interest” response
- More qualified conversations per 100 contacts

Financial Impact Modeling

(6-Month Results)

Based on 155-record test cohort:

- Citytwig Appointments: 15
- ZoomInfo + Data Axle Combined: 3
- Incremental Appointments vs Competitors: +12

Assume average annual premium per converted inactive account: \$20,000 (placeholder – adjust if needed)

Modeled Revenue Impact

155 Records

+12 Incremental Appointments

Avg Premium per Reactivated Account: \$20,000 (placeholder)

Base Premium Impact \$240,000

+25% Cross-Sell Lift

Adjusted Premium Impact \$300,000

Scaled to 10,000 Inactive Accounts

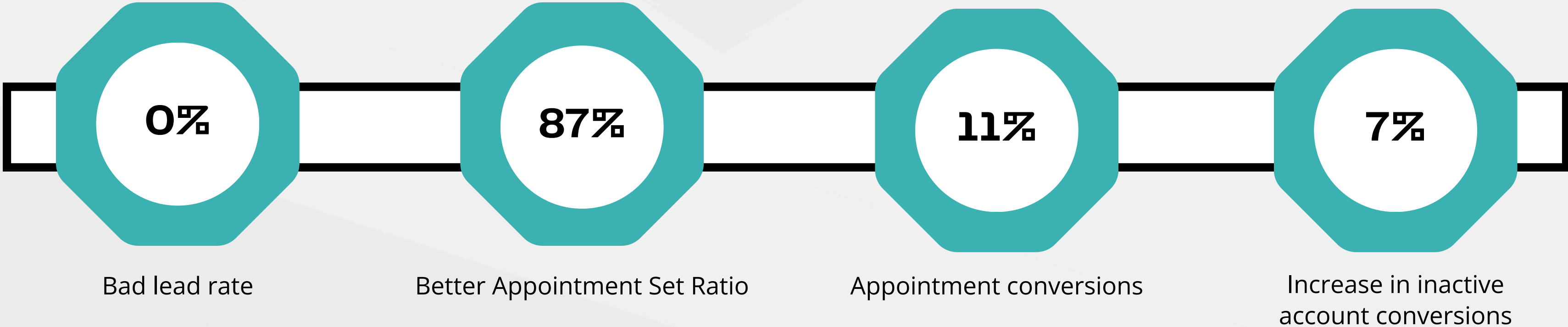
Projected Appointments
Approx: **645**

Projected Premium Opportunity
\$12.9M

Contribution Margin
20% (\$2.58M)

Strategic Findings (6-Month Evaluation)

Operational Impact



Key Takeaways

Enables organizations to find the “right” cross-sell or upsell product for their existing customers

Citytwig / Hulii AI ensures the right agents are selling the right products to the right accounts

Citytwig’s key value proposition of enhancing the agent to enhance the account is valuable across a variety of industries

Thank you.



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