



## Outreach & Conversions Case Study

Tier 1 Carrier

February 2025



# Case Study Overview

6-Month Outreach & Conversion Optimization  
Deployment of Citytwig | Hulii AI Models

## Objective

Increase advisor outreach efficiency, improve appointment set rates, and drive higher policy conversion through AI-prioritized prospect targeting.

## Scope

6-month deployment across defined advisor territories and product lines.

## Focus Areas

- Prospect prioritization
- Appointment setting efficiency
- Lead quality improvement
- Conversion rate lift

# Baseline Outreach Constraints

## (Pre-Deployment)

### Citytwig AI analysis uncovered structural inefficiencies:

- High outbound volume with low conversion yield
- Inconsistent appointment set ratios across territories
- No structured prioritization of high-probability prospects
- Advisor time spent on low-quality or misaligned leads
- Limited visibility into conversion patterns by geography or product

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### Key Insight

Outreach volume did not consistently translate into premium growth.

# AI-Driven Outreach Framework

Tier 1 Carrier deployed Citytwig | Hulii models to shift from volume-based outreach to probability-based outreach.



## Prospect Intelligence Layer (Citytwig AI Models)

AI-ranked prospects based on:

- Demographics
- Industry / SIC alignment
- Historical buying signals
- Financial indicators
- Geographic opportunity density

## Hulii IQ - Lead Scoring

- Identified highest-likelihood conversion accounts
- Flagged cross-sell & upsell opportunity
- Recommended optimal outreach timing
- Provided advisor-specific talking points based on account profile
- Scored accounts dynamically as engagement data updated

## Hulii Connect — AI Voice Agent

- Automating first-touch engagement
- Delivering AI-prioritized call queues
- Pre-qualifying prospects before advisor involvement
- Tracking real-time engagement & disposition analytics

## Performance & Optimization Layer

- Tracks appointment outcomes
- Measures conversion by territory, advisor, & product
- Monitors drop-off points in outreach cadence
- Feeds engagement data back into scoring models
- Refines probability rankings over time

# Outreach & Conversion Results

Evaluation period: 6 months

## Measured Improvements

- Appointment Set Rate: +38% improvement
- Contact-to-Meeting Ratio: +42%
- Conversion Rate from Appointment to Policy: +21%
- Reduction in Unqualified Lead Engagement: -35%

## Observed Behavioral Impact

- Advisors focused on higher-intent accounts
- Reduced outreach fatigue
- Increased meeting quality
- Improved premium per advisor productivity

# Financial & Strategic Impact: (6-Month Results)

## Revenue Translation

Per 1,000 AI-ranked prospects:

- Incremental Appointments: +120
- Incremental Conversions: +25
- Average Premium per Policy (placeholder): \$18,000

Incremental Premium Impact:

**\$450,000 per 1,000 prospects**

Contribution Margin (20% assumed):

**\$90,000 incremental contribution**

## Strategic Outcomes

- Transition from list-based outreach to probability-based targeting
- Increased advisor productivity without headcount expansion
- Improved visibility into territory-level conversion performance
- Scalable national rollout model

**Thank you.**



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