

From Seasonal Strain to Scalable Success

Insurance Provider Achieves 250% of Application Completion Goal, Boosts Customer Service Levels by 77%



WHAT WE DID

Insurance Support Services
Medicare Enrollment
Customer Care



INDUSTRY

Insurance



RESULTS

500 Licensed Agents Ready to Sell
In 5 Months

Exceeded Application Completion
Goal By 250%

Reactivated 100 Furloughed Agents In
48 Hours To Handle Post-AEP Surge

Ranked #1 Among External Vendors
For Sales Performance



Medicare Enrollment Form

Meeting the Harsh, Seasonal Demands of Medicare Enrollment with Rapid Scalability

[SITUATION]

A leading healthcare insurance provider offering Medicare Advantage plans needed help scaling its business to navigate the ever-fluctuating Annual Enrollment Period. Agents needed to be licensed, trained on compliance and regulatory requirements, and capable of handling sensitive member data while delivering quality consultative support. With seasonal volume spikes and unpredictable traffic, the client needed a partner who could deliver member care operations with speed, scale, and precision.

The client engaged MarketSource to rapidly scale a sales team, manage complex compliance requirements across multiple states, and execute both enrollment and retention strategies under tight timelines.

CHALLENGES

- Peak seasonal call volume
- Need to scale rapidly
- Complex compliance requirements



Scalable, Compliant Sales Engine Elevated Enrollment and Drove Retention

KEYS TO SUCCESS

Tiered sales structure

Scalability, quality assurance framework

Licensing/compliance infrastructure

[SOLUTION]

We launched a tiered sales model, beginning with 25 frontline member care agents focused on eligibility qualification. By mid-year, we expanded the team to include licensed agents who could also consult on plan options and complete enrollments. Within five months, we scaled the team to 500 agents, over half of whom were licensed to sell across multiple states.

To ensure compliance and readiness, we deployed a technology platform that tracked credentials, processed renewals, and streamlined agent licensing. This enabled 80% of our agents to be licensed and ready to sell within 14 days.

250%

of client's application completion goal achieved in the first year, with high conversion rates and low cost per acquisition.

Real-World Results



500 Licensed Agents



Agents Ready To Sell in 2 Weeks



Ranked #1 Among External Vendors For Sales Performance

In the first year, our team helped the client achieve 250% of its application completion goal, with high conversion rates and low cost per acquisition.

When unexpected post-AEP traffic surged, MarketSource reactivated 100 furloughed agents within 48 hours, while improving customer service levels by 77%.

The client ranked MarketSource #1 in sales performance among external vendors and #2 across nine sales teams (including internal groups).

The following year, we scaled the project to 860 licensed agents.

MarketSource, an Allegis Group company, is a sales acceleration company focused on delivering better outcomes for many of the world's most iconic brands. We design and operationalize managed sales and customer experience solutions in B2B and B2C environments. Our solutions are purpose-built and tech-enabled to deliver measurable improvements in business outcomes.