

# 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



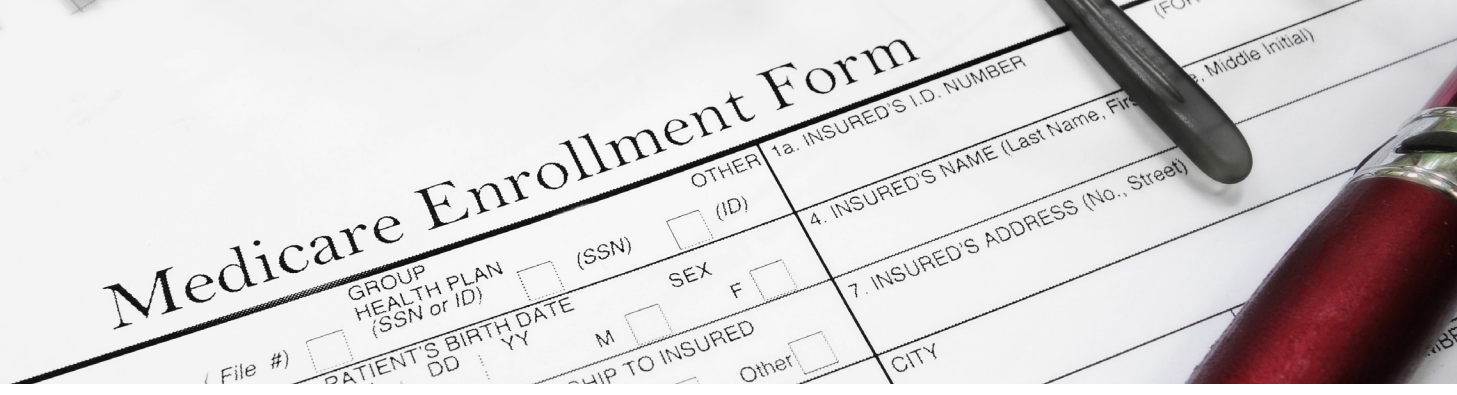
## RESULTS

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



# 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

## [SOLUTION]

### KEYS TO SUCCESS

Tiered sales structure

Scalability, quality  
assurance framework

Licensing/compliance  
infrastructure

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 fully licensed 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 Fully  
Licensed 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.