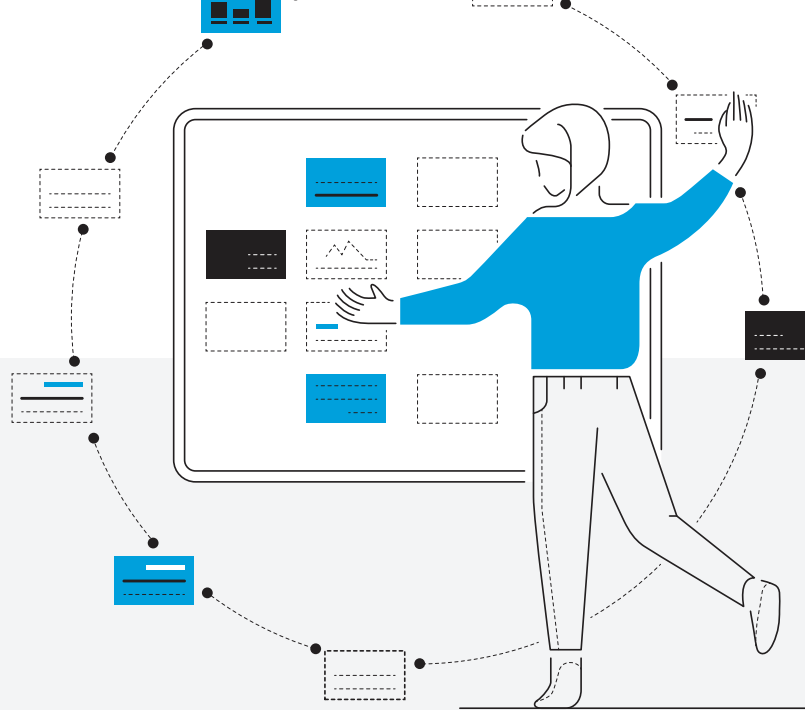




Aflac increases agent productivity and close rates with new sales prospecting tool

After 12 months of Data Axle Genie:

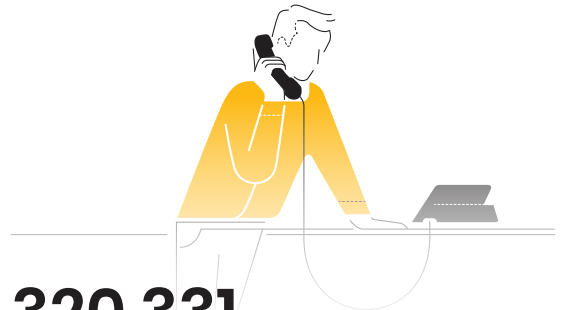
2.1 million

leads generated



320,331

outbound approaches to leads recorded



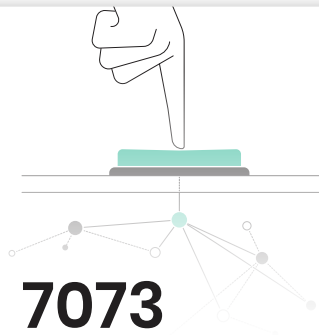
1165

new accounts with enrollments



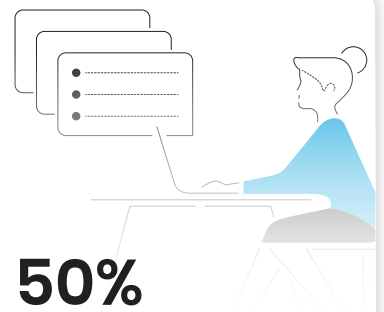
7073

meetings with decision makers



50%

lead email match rate estimated



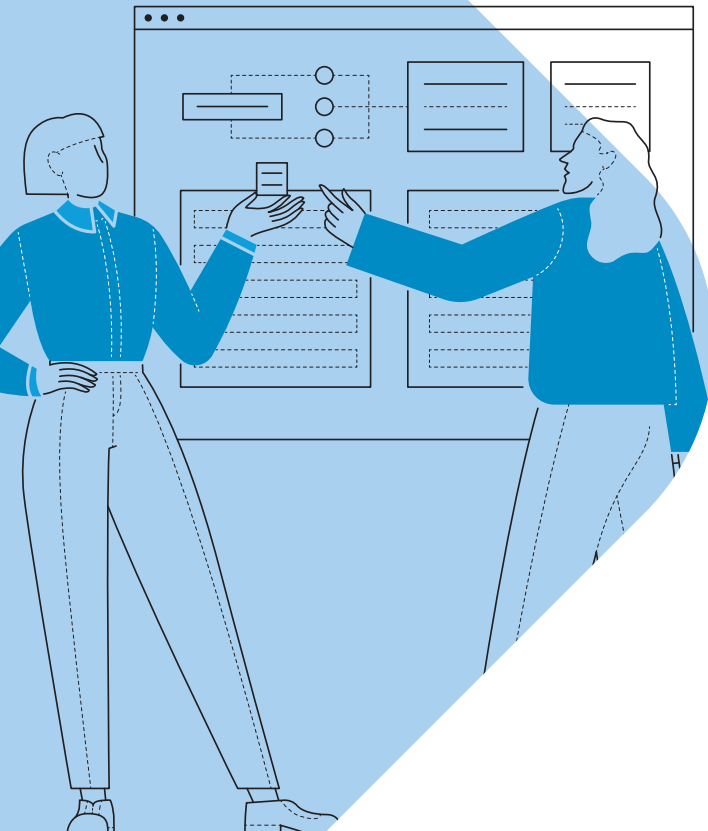


The Challenge

Aflac is America's largest and arguably most recognized supplemental insurance company. Aflac has over 20,000 independent agents nationwide, most of whom are agents.

Before working with [Data Axle](#), the lead process was not centralized so sales teams didn't have a clear understanding of the number of leads or how many new enrollments their outreach generated. Aflac needed a quality prospecting tool to roll out to their workforce; ideally, one that was remote-workforce friendly.

They also needed to verify the data they had inside their CRM. Data is constantly changing and evolving, and most data needs regular [cleansing, validation](#), and [updating](#). Aflac's decentralized system meant they relied on agents to manually update lead contact information during outreach.



The Solution

Given the challenges Aflac was facing, the company concluded that a prospecting solution with real-time data would help them increase productivity and reduce manual data processing. The Aflac team worked with Data Axle to develop a 3-year plan to cleanse their data and bring their agents together and onboard them onto a single, centralized system to streamline the prospecting process and maximize sales.

The program included implementing [Data Axle Genie](#), a cloud-based sales and marketing platform that provides accurate, real-time consumer and business information integrated directly into Aflac's CRM system, and accompanied by a Data Axle Genie mobile app. In addition, Data Axle provided Aflac with data processing solutions and Form 5500 (health and welfare benefits) data, as well as the ability to suppress current clients and prospects on the "Do Not Contact" list from being targeted in acquisition campaigns.



Execution

Building a data-driven culture founded on accurate data

Aflac agents couldn't maximize their sales potential with outdated, incorrect or incomplete data missing key contact information such as phone number, email, or mailing address. Data Axle integrated Data Axle Genie directly into Aflac's Microsoft Dynamics instance to match and verify their existing contacts against Data Axle's [industry-leading, verified business data](#). This process enabled Aflac to automatically verify and append business data in real-time as the records were created in their CRM. Now that Aflac's CRM was stocked with quality data, reps could spend more time on the phone, making calls to valid numbers and sending emails to deliverable email accounts, shortening sales cycles and improving revenue.

Motivating and mobilizing the salesforce

Even the best lead generation and prospecting tools won't help if the sales team doesn't feel comfortable using them. Data Axle set up training sessions to teach Aflac's sales team how to use Data Axle Genie and made training videos available directly into their CRM tool. As Aflac's sales teams went completely remote due to COVID-19, Data Axle's technology and training helped salespeople used to face-to-face selling rapidly pivot to doing business completely online. The ease of access to online training and the convenience of Data Axle Genie mobile app helped a workforce in transition.

Planning for mobile

Aflac agents are constantly on the move. To keep them efficient, Aflac created a mobile app that made their CRM data available to them 24/7, whether they are in the office, on the road, or at home. Data Axle built a unique integration with this app which enabled Aflac agents to export leads directly from their devices into their CRM so that they can create their prospect lists quickly and easily.



“Our sales team is constantly on the move. The mobile app has made it so much easier for them to keep track of their leads across all their territories. The ease of adding notes on prospects helps reps add a personalized touch whenever they reach out.”

Luke Mansour, Senior manager sales technology



Results

Increased Leads

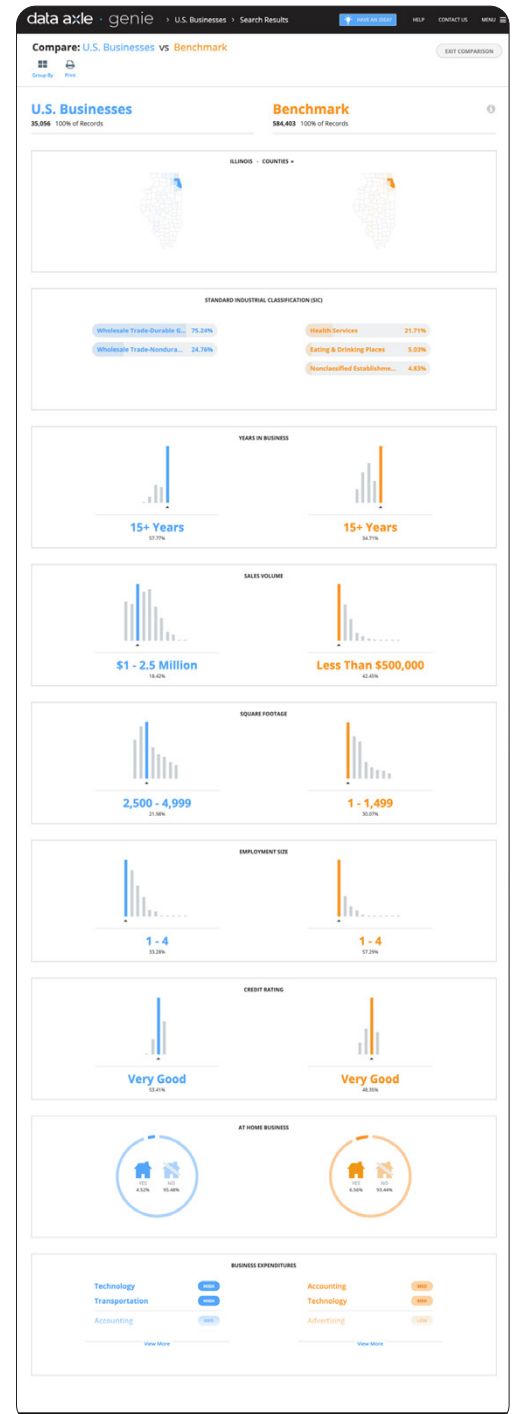
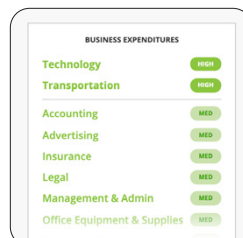
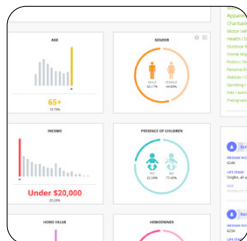
Making clean data a priority has been a good strategy for Aflac. Although Data Axle Genie was deployed during the pandemic, the company has seen a healthy influx of qualified leads, with over 2.1 million leads created into their CRM, over 320,331 outbound approaches to leads (business touches), a 1,165 uptick in enrollments, 7,073 meetings with decision makers to discuss enrollments, and a 50% estimated email match rate.



Streamlined and consistent processes

Integrating Data Axle Genie completely into Microsoft Dynamics, from the mobile app to the browser, has allowed Aflac to better track the effectiveness of their lead sources and the ROI of their sales people's outreach.

Data Axle Genie is the only supplemental lead source appending data in Aflac's CRM. This has reduced the variability of leads entered into the CRM, creating standardized, cleaner data without de-incentivizing the sales team's drive to add new prospects into the system.





A productive and empowered salesforce

Providing access to a robust prospecting tool has led to a more centralized, productive, and engaged sales team. Aflac's CRM has over 10,000 unique users, and user adoption of Data Axle Genie is high. Because Aflac required that their teams are fully trained on Data Axle Genie, sales staff are using the tool effectively, are more productive, save time by easily accessing leads, bulk-logging calls, and using features such as voice notes.

Customization

Aflac's custom-built integrations ensure that their CRM works smoothly as they continuously add and scrub data in real-time. Aflac believes the integrations will help keep agents productive as they develop their mobile app down the line.

“Time is our most valuable resource, and Data Axle Genie delivers. The platform has given our sales force the tools they need to increase their efficiency and productivity and, ultimately, make more sales. As we continue to grow our partnership with Data Axle, we are thrilled to see the results of our new lead generation and sales processes.”

Luke Mansour, Senior manager sales technology

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