

LEADVOLT

MAY 2020

## LeadVolt Case Study

These non-technical founders quickly launched a successful insurance-tech company that helps agencies maximize their revenue and productivity with a purpose-built lead management and CRM solution. Learn how 8base helped bring LeadVolt to life.

Multi-Tenant SaaS

Insurance Tech

Process Management

CRM

Business Intelligence

Telephony

Rules Engine

Messaging

Sales Management



Software has been “eating the world” for almost a decade now, but it’s not just developers who drive this paradigm shift.

As the general population becomes more tech-savvy, people without technical backgrounds are stepping up to solve huge challenges by creating niche applications.



With creative solutions to industry problems and the vision to shake up the status quo, these entrepreneurs are partnering with development teams to take their ideas to market.

That’s just what Jason Killings, CEO and co-founder of LeadVolt, did by teaming up with 8base Labs to solve some of the biggest problems facing insurance agents today.

## SOLVING A PERSONAL PROBLEM, SOLVING AN INDUSTRY PROBLEM

As a 14-year insurance veteran, Jason was frustrated with how his business was performing. His industry, which once relied on conversations and personal relationships, was dramatically disrupted by today's digital revolution.

In the not-too-distant past, both independent agents (those who sell policies from multiple providers) and "captive" agents (those who work for a single provider, such as Allstate) would rely on foot traffic for their sales. While it may be hard to believe in today's world, most insurance policies were written in brick-and-mortar offices.



“Previously, people would come to our office, they'd sit down, and we'd have a face-to-face conversation,” Jason recalls. “After being in this space for 14 years, I can tell you that just doesn't really happen anymore.”

The decrease in person-to-person sales led agencies to purchase lists of leads for agents to call. Jason found his firm spending tens of thousands of dollars for these lists, which led him to discover three main problems:

1

**Outdated workflows for interacting with customers:** Instead of using a customer relationship management system (CRM), most agents were relying on sticky notes and paper calendars to determine which leads to pursue.

2

**Lack of insight into a list's quality:** It was difficult and cumbersome to figure out whether the list he purchased was converting or should be tossed in the trash.

3

**Limited understanding of agent effectiveness:** He found it hard to tell how his agents were performing, and which practices could be replicated throughout his firm.

“Buying insurance is kind of like buying a car—it’s a purchase that doesn’t happen very often,” Jason says. “Most people don’t buy on the first conversation, and not having the right workflow, systems and tools to ensure that you’re reaching out to the right person, at the right time and in the right way means you leave a lot of money on the table.”

Jason tried a number of the CRMs on the market but found them lacking. They were not tailored specifically for the insurance sales process, and he had to keep coming up with workarounds and modifications to get the software to be more of a help than a hindrance. Even then, those three core problems persisted.

“I’d try to make those systems work for me. I talked to their developers to explain what I needed to run my business, but all they wanted to do was charge me customization fees,” a frustrated Jason remembers. “I got to the point where I no longer wanted to fix someone else’s lackluster software that wasn’t designed for our niche. Instead, I saw the opportunity for me to build a system for insurance agents by insurance agents to get them the needed data and reduce their workload.”

The screenshot displays the LeadVolt CRM interface for a lead named George Franklin. The interface is divided into several sections:

- Header:** Shows "Lead Management" and navigation options like "Call", "Text", "Email", "Fax", and "Create Task".
- Lead Information:**
  - Name:** George Franklin
  - Lead Type:** Auto
  - Credit Score:** Very Good
  - Auto #2 Make:** Dodge
  - Date of Birth:** May 13, 1965
  - Address:** 320 Sevilla Ave Suite 202
  - Auto #1 Make:** Honda
  - Auto #2 Model:** Ram
  - Gender:** Male
  - City:** Coral Gables
  - Auto #1 Model:** Civic
  - Auto #2 Trim:** 2WD Sedan
  - Email:** georg.frank51@gmail.com
  - State:** Florida
  - Auto #1 Trim:** 2WD Sedan
  - Auto #2 Year:** 2013
  - Primary Phone Number:** (562) 353-0543
  - ZIP Code:** 33134
  - Auto #1 Year:** 2012
  - Auto #2 Annual Mileage:** 32,421
  - Other Numbers:** (562) 421-3523
  - Auto #1 Annual Mileage:** 12,542
- Detailed Information:**
  - CURRENT INSURANCE:**
    - Current Insurance Carrier:** AAA
    - Current Coverage:** 100/300
    - Coverage Duration:** 2 years, 0 months
    - Policy Expiration Date:** 04-16-2020
  - REQUESTED POLICY:**
    - Requested Coverage:** Medical Coverage
- Lead History:**
  - Today 1:50 PM:** Outbound call (Duration: 21:53)
  - Yesterday 12:25 PM:** Outbound call (Missed by Agent)
  - 07/09/2019 1:50 PM:** Fax Sent (253) 325-5325
  - 07/09/2019 11:50 AM:** Task created (Set for 10/09/2019)
- Tasks:**
  - Event Title:** Lorem ipsum
  - Date:** 10/09/2019 - 10AM EST.
  - Send reminder** · **Edit Task**

## DISCOVERING 8BASE LABS

While he's not a technical co-founder, Jason Killings has always been intrigued by technology.



Jason grew up around computers and always appreciated their potential to increase efficiency. When Jason was a child, his father was an early adopter of dial-up internet and would pay bills online. (Remember when this was rare?)

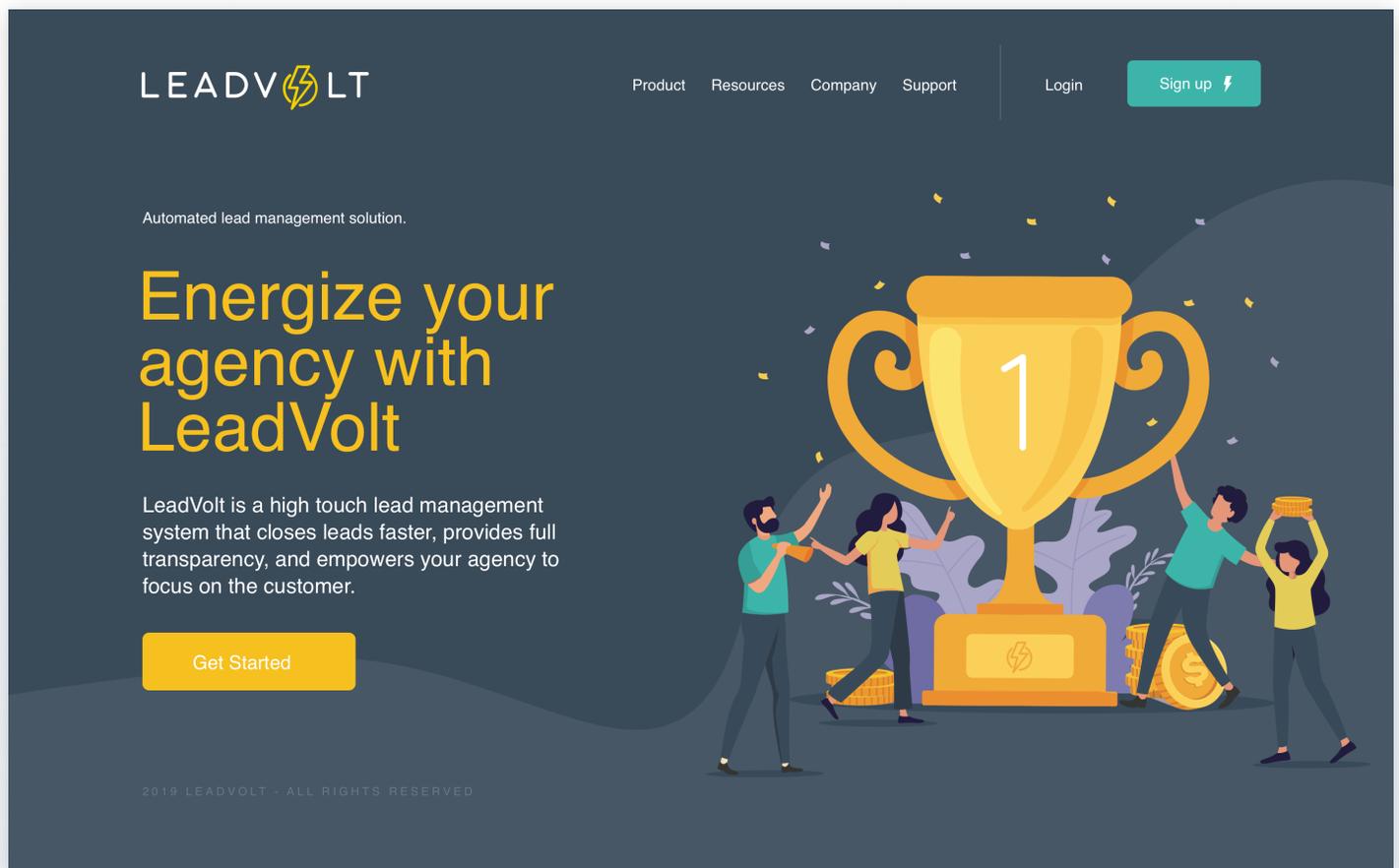
Later, Jason became a pilot and found he had a strong analytical mind when it came to interpreting and acting on flight data from his instrumentation. His experiences and aptitude for logical thinking led him to see there was a better way to handle his company's workflow.

However, it wasn't until a chance introduction to 8base founder Albert Santalo that Jason realized there was a company that could help bring his vision to life. He recalls learning how the company was building a low-code platform that would allow developers to rapidly build and scale an application on the Amazon Web Services (AWS) platform.

Jason's interest was really piqued when he learned that 8base had a professional services team, dubbed 8base Labs, that builds applications for entrepreneurs.

“I had spent half a million dollars over the past five years on software for our lead management, and I wasn’t satisfied with any of them,” Jason says. “I knew I had a better way of doing business. However, an idea without the tools to make it happen means it’s not going anywhere. You can’t build a treehouse without a hammer, nails and some wood.”

In learning about 8base, Jason finally saw the solution to his problems. The idea for LeadVolt was born, and he believed that the 8base team could bring it to life.



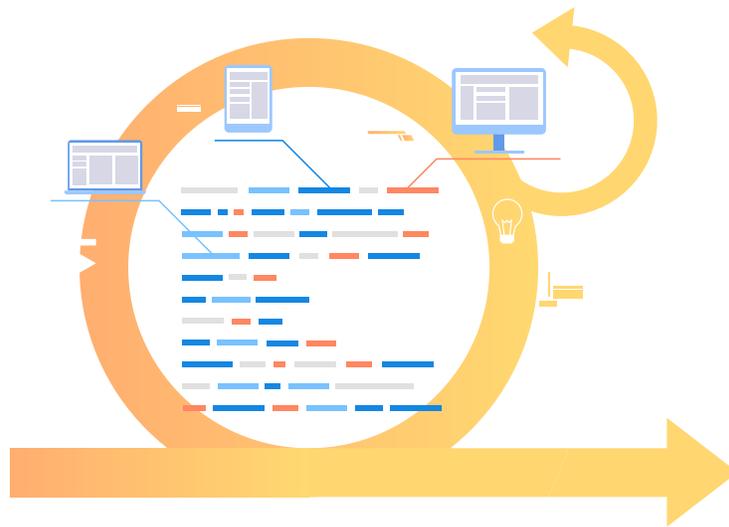
## BEGINNING WORK ON LEADVOLT

Jason had a high-level list of the things he wanted LeadVolt to do for a firm's frontline insurance agents and for its owners.

- First, he wanted to make sure that there was a way to take in all the lead data that insurance agents purchase.
- Second, it was imperative that the entire insurance agent workflow be handled on the LeadVolt platform. This meant that all generic email drip campaigns, personal email interactions, phone calls, call transcriptions and text messages would take place inside his system.
- Finally, the user experience needed to be intuitive and elegant, something that would would enhance his agents' productivity rather than trip them up.

By accomplishing each of these three goals, Jason felt that he would then have the right kind of data, which could then feed into LeadVolt's analytics engine. Finally, insurance agents would have on-demand information about the quality of their lead lists, and a firm could understand the effectiveness of their staff at nurturing and converting prospects.

While Jason had an intimate understanding of his idea, he knew that he had to communicate it to the 8base Labs team. Fortunately, they made this process incredibly easy.



“Working with the 8base team, we broke the project up into parcels. We’d have a check-in prior to designing it to make sure that we were still on the same page and see if there were any deviations we needed to work through,” Jason remembers. “We’d then have a development sprint where we got to see our ideas come to fruition.”

Jason enjoyed working on his project through this agile process because he got to see it advance in real time. These sprints kept him focused on—rather than overwhelmed by—the specific tasks and functionality that needed to be implemented at each stage.

“It’s also kind of refreshing to be able to actually see something tangible instead of handing off the plan to the developers and saying, ‘OK, have at it. I’ll see you in six months!’” Jason says.

## ACCELERATING LEADVOLT'S DEVELOPMENT THROUGH API INTEGRATIONS



In working with the 8base Labs team, Jason was excited by how well they utilized other technologies to extend LeadVolt's functionality.

In particular, leveraging third-party APIs instead of building similar technologies in-house was a key driver in getting LeadVolt to market quickly.

Case in point: LeadVolt's telephony integration via Twilio.

LEADVOLT + twilio

"Since LeadVolt is web-based software, I needed to ensure that an agent's phone calls went through our system. However, building this telephony functionality would have taken a lot of time and increased our costs," Jason explains. "My 8base team suggested that we integrate with Twilio, a company that has already perfected the telephony integration, to handle calls, voicemails, text messages and more, all within the LeadVolt platform. This integration was huge!"

LeadVolt also had 8base integrate Amazon Transcribe, which automatically generates phone call transcripts. LeadVolt can then assign a call score based on certain keywords, helping to assess how agents are doing with their customer interactions. Again, this functionality would have been time-consuming and expensive to build from scratch.

LEADVOLT + aws

“I look at 8base as the hub and all these APIs as the spokes along the wheel,” Jason says. “Having a team that has the ability and know-how to bring in these APIs only enhances LeadVolt’s platform, expanding our system’s functionality exponentially.”

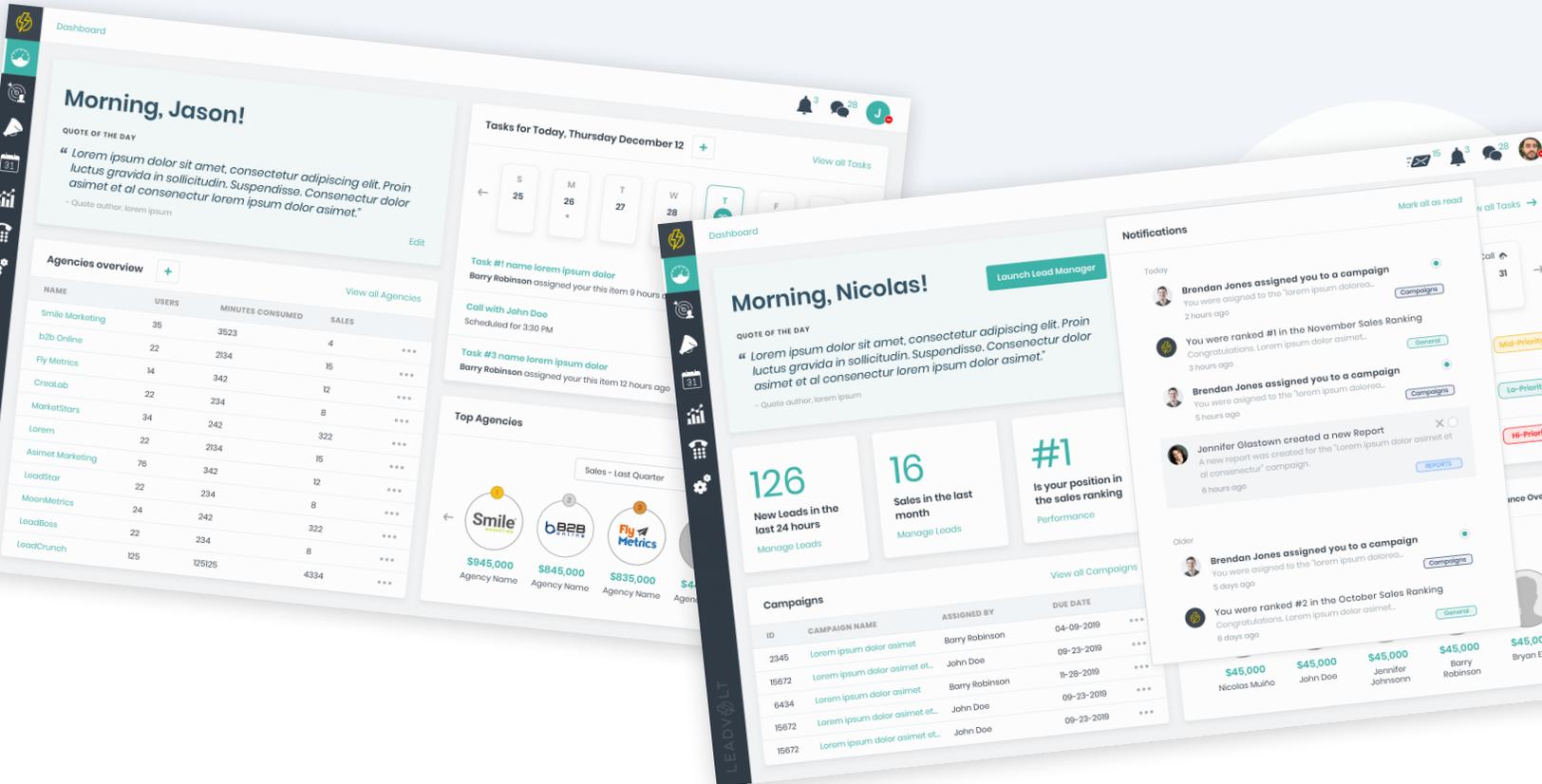
The screenshot displays the 'Billing' settings page in the LeadVolt application. The sidebar on the left includes navigation icons for Home, Settings, Billing, and other system functions. The main content area is divided into several sections:

- Subscription Plan:** Shows three available plans:
  - LOREM IPSUM:** \$8 / mo. (Placeholder text: Lorem ipsum, dolor 100 asimet, conse nectur, et al consenctur.)
  - DOLOR ET:** \$12 / mo. (Placeholder text: Lorem ipsum, dolor 100 asimet, conse nectur, et al consenctur.)
  - ASIMET ALL:** \$8 / mo. (Placeholder text: Lorem ipsum, dolor 100 asimet, conse nectur, et al consenctur.)
 A 'Change Plan' button is present, along with a notification: 'You will be charged \$12 on 11/02/2020'.
- Payment information:** Displays the current credit card details, including the card number (masked as \*\*\*\* \* 8231), the VISA logo, and the expiration date (12/2023). An 'Edit Payment information' button is available.
- Payment History:** A table showing recent payments:
 

DATE	ITEM NAME	STATUS	AMOUNT
03/12/2019	Dolor Et Subscription Plan	Paid	\$12 <a href="#">View PDF</a>
03/11/2019	Dolor Et Subscription Plan	Paid	\$12 <a href="#">View PDF</a>
- Cancel Subscription:** A red 'Cancel Subscription' button is shown, with the text: 'You can cancel at anytime'.

## COMMUNICATING TO BRING LEADVOLT TO LIFE

## LEADVOLT



Jason credits the high quality of LeadVolt's development to the incredible professionalism of the 8base Labs team and the dialogue he had with them.

He felt that the team not only was invested in his idea, but truly took the time to understand the obstacles he was trying to overcome.

“The 8base services team are top-notch professionals that know web-based technologies inside and out. If you have an idea but lack technical know-how, they’re the team you want to guide you through the process.”

### What will your success story be?

If you’re an entrepreneur looking to rapidly build sound applications from the first line of code, the 8base services team is here to help. Learn more about the 8base platform at [8base.com](https://8base.com) and contact us at [hello@8base.com](mailto:hello@8base.com) to get started today.

The screenshot displays the 8base dashboard interface. At the top, there are notification icons for 15 emails, 3 alerts, and 1 chat message, along with a user profile picture. The main content area is divided into several sections:

- Launch Lead Manager:** A teal button in the top left.
- Tasks for Today, Thursday August 28:** A calendar view showing the current date (28) and previous days (25, 26, 27). Below the calendar, there are three task cards:
  - Task #1 name lorem ipsum dolor:** Assigned by Barry Robinson 9 hours ago.
  - Call with John Doe:** Scheduled for 3:30 PM.
  - Task #3 name lorem ipsum dolor:** Assigned by Barry Robinson 12 hours ago.
- Channels:** A list of channels with counts:
  - 2019 Sales Campaigns (4)
  - Team Performance (2)
  - Water Cooler (4)
- Direct Messages:** A list of direct messages:
  - Brendan Kiltz
  - Traci Arnold
- Contacts:** A list of contacts with their initials and names:
  - Brendan Kiltz (B)
  - Phyllis Jennings (P)
  - Elbert Caldwell (E)
  - Traci Arnold (T)
  - Darlene Perry (D)
  - Casey Hill (C) - 2h
  - Danielle Johnson (D) - 1d
  - Thomas Brothal (T) - 19m
- Top Performance:** A section partially visible at the bottom left.
- Message Preview:** A floating window showing a message from Brendan Kiltz: "Hello Gary, good morning! I was wondering what you worked on yesterday" (9:15). A response "Hi Brendan!" is shown (9:20).
- Table:** A table with columns "BY" and "DUE DATE".
 

BY	DUE DATE	
inson	04-09-2019	...
	09-23-2019	...
inson	11-28-2019	...
	09-23-2019	...
	09-23-2019	...

Find out more  
about LeadVolt at  
[www.leadvolt.com](https://www.leadvolt.com)



8base.com  
hello@8base.com