

# Value-Ad Proof of Concept

Use Case	Targeted Audience	Problem Definition	Objective	Key Measurable / Benchmark	What We Need From You	Project Plan	Term	Cost
Orphans	Agency	Lapse Rate is high, ability to cross sell and upsell is low	Assign a new servicing agency after a face to face meeting	Deliver the Orphan to a Salesperson Receive Feedback from the Salesperson Show - Appointment ratio, Closing Ratio (Over All, at Salesperson Level) Benchmark: Double the existing reassigned ratio	20 reasonable hungry qualified salespersons that have at least 10 sales. All from the same geographic area. Salespersons need a smart phone and access to internet. 7500 Orphans (Names, mobile number, name of the last servicing salesperson, reason for the call, telephone script). NB Orphans must be active paying clients, aged between 20 - 60 An ops person that can make decisions	Deploy Environment 1d Branding 1d English Messages 1d Local Translation 5d Uat with 5 members 3d Go Live All in 2 Weeks 1 Month notice to make resources available	3 Months	\$ 5 000 pm \$10 per salesperson pm 3 months in advance
Project 100	Agency	The survival rate of new salespersons	Increase the survival rate by helping with the identification, measurement and monitoring of new salesperson prospecting activities	1st year survival rate Appointments seen Referrals received	We need support from your training department to supply the initial skills training material to embrace data and the close monitoring on new recruits.	Deploy Environment 1d Branding 1d English Messages 1d Local Translation 5d Uat with 5 members 3d Train the trainer 3 weeks for your team to redo the training material. All in 8-9 Weeks to get started. 1 Month notice to make resources available	Min 6 months	\$ 60 000 for the 6 month. No limitations. Thereafter \$ 10 000 pm and \$10 per active use per month. The initial amount is in advance.
Recruiting	Agency	Large organizations are seeing the opportunity to centralize and use their marketing presence to generate potential recruits. But have no way of ensuring that the agency leadership act on these opportunities.	Increase the salesperson manpower figures	Clarity around: Activity ratios at all levels Skill ratios at all levels Campaign performance Lead source performance Overall ROI	A list of the recruiting managers. (Names, company ids, email address, mobile numbers) NB their geographic target. The recruiter information, reach the client. - Details around where the recruit came from and NB where do they live so that we can assign to the right recruiting manager. A mandate to re-assign if the assigned recruiting manager does not take action AND OR does not provide feedback in the agreed time frame.	Deploy Environment 1d Branding 1d English Messages 1d Local Translation 5d Uat with 5 members 3d Go Live All in 2-3 Weeks 1 Month notice to make resources available	Min 3 months	\$ 5 000 pm \$10 per salesperson pm 3 months in advance
Premium Collections	Agency - On the road physical collections	Some marketplaces need the salesperson or collection salesperson to physically fetch the premiums from the clients. Collection rates are usually lower than expected.	Increase the persistency rates and premiums collected	Increase the persistency rates and premiums collected	A list of clients with outstanding premiums (Their contact details). The salesperson you want to make contact with the client. OR A way to assign the collection to a collection salesperson. A mandate to re-assign if the assigned person does not take action AND OR does not provide feedback.	Deploy Environment 1d Branding 1d English Messages 1d Local Translation 5d Uat with 5 members 3d Go Live All in 2-3 Weeks 1 Month notice to make resources available	Min 3 months	\$ 5 000 pm \$10 per salesperson pm 3 months in advance
X-Selling / Upselling / Marketing / Social Media	Agency / Banca / Partnerships	Marketing generate leads to salespeople and then do not know what happened to them afterward. This makes it difficult to work out the ROI and also to provide feedback to the lead source.	Create transparency so that problems can be addressed	Clarity around: Activity ratios at all levels Skill ratios at all levels Campaign performance Lead source performance Overall ROI	A list of all the salespeople that have a track record . (Names, company ids, email address, mobile numbers). The list should have 3x more salespeople than expected to use so that the best can be identified. 50-100 salespeople The prospect / lead information. The salesperson needs to reach the client. - Details around the source of the leads and why they are calling. Volumes needed for a 90 day poc : 1500 - 2500. A mandate to re-assign if the assigned salesperson does not take action AND OR does not provide feedback.	Deploy Environment 1d Branding 1d English Messages 1d Local Translation 5d Uat with 5 members 3d Go Live All in 2-3 Weeks 1 Month notice to make resources available	Min 3 months	\$ 5 000 pm \$10 per salesperson pm 3 months in advance
Maturities	Agency Predominantly can be Banca / Partnerships	Low retention of maturing assets	Retain more of maturing capital by investing in single premium products	Existing maturity retention ratio vs VA retention ratio	A list of all the salespeople that have clients with maturities over the next 6 months. (Names, company ids, email address, mobile numbers) The client information. The salesperson needs to reach the client. - Details around the maturity A mandate to re-assign maturities if the assigned salesperson does not take action AND OR does not provide feedback.	Deploy Environment 1d Branding 1d English Messages 1d Local Translation 5d Uat with 5 members 3d Go Live All in 2-3 Weeks 1 Month notice to make resources available	Min 3 months	\$ 5 000 pm \$10 per salesperson pm 3 months in advance
Partnership Banking	Face to Face Banca	Partnership generate leads to salespeople and then do not know what happened to them afterward. This makes it difficult to work out the ROI and also to provide feedback to the lead source.	Create transparency so that problems can be addressed	Clarity around: Activity ratios at all levels Skill ratios at all levels Campaign performance Lead source performance Overall ROI	A list of all the salespeople that have a track record . (Names, company ids, email address, mobile numbers). The list should have 3x more salespeople than expected to use so that the best can be identified. 50-100 salespeople The prospect / lead information. The salesperson needs to reach the client. - Details around the source of the leads and why they are calling. Volumes needed for a 90 day poc : 1500 - 2500. The actual setup will vary depending on the type of partnership e.g. In-branch advice based sales vs over the counter add ons OR Bank employees selling vs partners selling. A mandate to re-assign if the assigned salesperson does not take action AND OR does not provide feedback.	Deploy Environment 1d Branding 1d English Messages 1d Local Translation 5d Uat with 5 members 3d Go Live All in 2-3 Weeks 1 Month notice to make resources available	Min 3 months	\$ 5 000 pm \$10 per salesperson pm 3 months in advance
Partnership Non-Banking	Face to Face Partnership	Partnership generate leads to salespeople and then do not know what happened to them afterward. This makes it difficult to work out the ROI and also to provide feedback to the lead source.	Create transparency so that problems can be addressed	Clarity around: Activity ratios at all levels Skill ratios at all levels Campaign performance Lead source performance Overall ROI	A list of all the salespeople that have a track record . (Names, company ids, email address, mobile numbers). The list should have 3x more salespeople than expected to use so that the best can be identified. 50-100 salespeople The prospect / lead information. The salesperson needs to reach the client. - Details around the source of the leads and why they are calling. Volumes needed for a 90 day poc : 1500 - 2500. A mandate to re-assign if the assigned salesperson does not take action AND OR does not provide feedback.	Deploy Environment 1d Branding 1d English Messages 1d Local Translation 5d Uat with 5 members 3d Go Live All in 2-3 Weeks 1 Month notice to make resources available	Min 3 months	\$ 5 000 pm \$10 per salesperson pm 3 months in advance
Debtors Collections	Outbound Contact Center - Late Collections	Decreasing collection rates	Increase the contact to conversion rate	Random allocation vs Matched allocation on contacted clients	9 months of historical collections data showing the client demographics, the collector who spoke to the client and the outcome of the call. NB We do not need any personal identifiable data on the client e.g. name, telephone or email address. NB must have at least 15 collectors who have success with at least 20 clients.	Once the data is received: 2 days to build the database 2 weeks to build the models Few days to do a sanity test with local team. Plan on 1 month from start to end. 1 Month notice to make resources available	6 months	\$15 000 for the 1st 3 months, then risk share
Telemarketing	Outbound Telemarketing	Decreasing sales with market saturation	Increase the contact to conversion rate	Random allocation vs Matched allocation on contacted leads	9 months of historical sales showing the client demographics, the salesperson who spoke to the client and the outcome of the call. NB We do not need any personal identifiable data on the client e.g. name, telephone or email address. NB must have at least 15 salespeople who have previously sold to at least 20 clients.	Once the data is received: 2 days to build the database 2 weeks to build the models Few days to do a sanity test with local team. Plan on 1 month from start to end. 1 Month notice to make resources available	6 months	\$15 000 for the 1st 3 months, then risk share