

# CASE STUDY



The integration of PreQuo Lead Gen means our prospective customers can experience an easy-to-use, professional online protection solution.



Vita®



Vita was established in 2010 by friends Barry Pappin and Paul Reed whose vision was to be the most trusted, fairest and credible insurance brokerage providing the best advice and cover to help protect people across the UK. Vita's customers benefit from a flexible service provided mainly over the phone through a dedicated adviser.

The first-class service has resulted in a 99% positive feedback rating and 'Platinum Trusted Service Award for 2021' on independent review site Feefo plus winner of the 'Protection Adviser of the Year' category at the Money Marketing Awards 2020.

Paul Reed, Director at Vita, describes how iPipeline's PreQuo Lead Gen has helped customers understand more around the affordability of protection in turn improving their sales leads and conversion rates.



## CHALLENGE

Vita's website has always been very welcoming and engaging for customers, offering a wealth of useful content and details on how products work. Visitors to the site are educated on the importance of protection and how they can get the right protection to meet their needs.

Their simple callback form served a purpose, but Vita realised one element was missing from their offering – a self-serve solution to help customers obtain a rapid personalised indication of the level of cover they needed, over what period and the associated cost. This would ensure that uncertain customers would understand their needs more easily and encourage them to do something about it.

Having worked with iPipeline for many years, Vita were aware of the functionality available to firms to improve this service so approached them to learn more.



## SOLUTION

iPipeline's PreQuo Lead Gen service is fully-brandable to offer a seamless user experience. Vita's customers gain a rapid understanding of the life cover they may require based on their circumstances and how affordable the cover is – all before they speak to an expert. By answering a series of simple questions, PreQuo Lead Gen serves up predictive and indicative life protection information instantly. Customers can also model what the impact of changing cover needs would have.

For those customers who are educated enough on protection to know exactly what they want, they can override the recommendations provided on the site and skip to requesting a call from an adviser who can then assist further with their enquiry.

iPipeline provided helpful suggestions during the build with functions that were useful, looked professional and kept within budget. In addition, the fully-brandable service offers a seamless user experience.



## RESULTS

The adoption of PreQuo Lead Gen has provided another channel of business to Vita. Overall, the customer experience is far better with PreQuo Lead Gen providing the customer with immediate access to the information they are seeking. The service on the website enables a higher sales conversion rate.

"The integration of PreQuo Lead Gen means our prospective customers can now experience an easy-to-use, superior and professional online protection solution. They can find out more about protection and can feel reassured that they will be able to source the level of protection that is not only affordable, but meets their needs. Partnering with iPipeline has created far greater intent from our customers who are now calling in from the website with a better understanding of the cost of cover and how the policies work."  
– Paul Reed, Director

