



Duncan
ADVISOR RESOURCES

Making It All Work Together



PROFORMEX CASE STUDY

Using Proformex to Generate \$500,000 in Target Premium



THE CHALLENGE

LACK OF TOOLS

Duncan Advisor Resources knew they were missing engagement opportunities without a system in place to provide easy access to current, accurate information for their sales team and advisors.



THE SOLUTION

AUTOMATED ALERTS WITH PROFORMEX

Proformex provides automated alerts that are configurable and can be triggered for events like:

- Term milestones & upcoming conversion deadlines
- Lapse pending & risky policies
- Premium due dates
- And more

PROFORMEX



THE RESULT

\$500,000 IN TARGET PREMIUM GENERATED

After being alerted to 2 upcoming conversion deadlines, the sales team at Duncan Advisor Resources connected with the advisor on the policies. The advisor worked with the client to better understand their current needs.

Ultimately, both policies were converted, and two additional policies were written, resulting in \$500k target premium.

“This was our biggest win yet since coming on board with Proformex,” said Alexa Smith, Duncan Advisor Resources. “The policy owners secured the coverage they needed before their conversion privileges expired, and our team plus the advisor we worked with on this case got to provide an exceptional level of service and generate additional revenue.”