

Case Study

Woodland park insurance services

“ I am so glad I was open to giving this one more chance when I heard about Elevate Teams... I signed on with one VA at first, a month later, I asked for another and then two months later, I got my third! The quality of the talent is top notch! ...the important piece for me is to know that the managers at Elevate treat my VA's well too... I made it clear that I also want to know that they advocate for their VA's happiness as well –and that– communication is KEY! ”

– Gail Crozier

Woodland Park Insurance

Our client is an independent insurance agency owner seeking to enhance productivity and customer service. They had previously engaged with another virtual assistant provider but faced issues with the quality of candidates and the retention of trained VAs. The client's primary objective was to find a reliable, efficient, and committed VA solution to support their agency's growth.

Overview

This case study showcases how Elevate Teams restored the faith of a skeptical client in the "Virtual Agent" concept after a disappointing experience with another company. By emphasizing a robust selection process, a commitment to VA happiness, and a results-driven approach, Elevate Teams demonstrated the true potential of virtual assistants in the insurance industry.

Solutions Offered by Elevate Teams

Elevate Teams introduced a comprehensive solution tailored to the client's needs:

Rigorous Candidate Selection Process:

It ensures the highest caliber of talent. All VAs are college-educated, bilingual, and possess relevant work experience. Additionally, they undergo a rigorous 5-week training program led by an industry expert.

Transparent Communication and Advocacy for VA's: Elevate Teams values open communication and actively advocates for VA happiness. Ensuring a positive work environment is a key aspect of their strategy to retain motivated and skilled virtual assistants.

Implementation and Process

After the initial consultation, Elevate Teams carefully evaluated the client's requirements and identified suitable virtual assistant candidates that would match with the client's culture. They swiftly matched the client with a highly competent VA, initiating a seamless onboarding process. The client's team and the VA established effective lines of communication to facilitate a smooth collaboration.

Conclusion

Elevate Teams' partnership with the client exemplifies the positive impact of well-trained, motivated virtual assistants that match the client's culture in the insurance industry. By overcoming skepticism and delivering exceptional results, Elevate Teams enabled Woodland Park to focus on growth and high-level customer service. Their commitment to transparent communication and VA happiness fostered a sustainable and thriving collaboration.

Are you ready to experience the transformative power of Elevate Teams' Virtual Assistants in your insurance agency?

3% turnover

Same timezone as you

AMS360

Starts at \$12.65/hr

Epic

Hawksoft

Contact us today to discover how our proven model can help elevate your business to new heights.