



MAVA PARTNERS CASE STUDY:

Black Swan Insurance Group,
Springboro, OH

HELPING AN
INSURANCE
AGENCY
build IVR & software
tools for success



CLIENT OVERVIEW

Black Swan Insurance Group is focused on helping people across the country find the life insurance and retirement solutions they need to protect their families and their futures. The agency worked with MAVA Partners to create a custom Interactive Voice Response system (IVR) that provides an infrastructure for qualifying leads, an essential element for creating a successful and profitable agency.



WORKING WITH A TECHNICALLY COMPETENT SOFTWARE DEVELOPMENT TEAM LIKE MAVA PARTNERS HAS ALLOWED OUR AGENCY TO GENERATE RECORD REVENUE GROWTH IN LESS THAN 3 YEARS. ROBERT BALGAC, CEO, BLACK SWAN INSURANCE GROUP





THE SITUATION

Black Swan Insurance Group follows a non-traditional insurance agency model and works through an independent channel, rather than with large national players. The agency generates leads for agents through marketing campaigns and feeds them to agents to follow-up with families that have requested assistance and work with them to create a solution that best fits their needs and budget. Because they generate revenue on insurance sales only, they needed a custom software system for pre-qualifying each lead before being sent to agents.

THE MAVA PARTNERS SOLUTION

Robert Balgac, CEO of Black Swan began working with MAVA Partners to develop an Interactive Voice Response system that would ensure that only qualified leads were passed on to his agents. The new infrastructure was a massive success, generating \$2 million in new revenue from those leads alone and increasing total revenues year over year. Mava Partners continues to service the Black Swan IVR system, making adjustments as the needs of the agency expand and change.



ROBERT BALGAC,
Balck Swan Insurance Group
CEO



I HAVE A GREAT WORKING RELATIONSHIP WITH MAVA PARTNERS. HAVING LEARNED FROM OTHER GOOD AGENCIES, I KNEW EXACTLY WHAT I NEEDED, AND THEY WERE ABLE TO DELIVER.

