

# Case Study: How FLX Scheduling Transforms Advisor Engagement

**The Challenge** Wholesalers were missing engagement opportunities because internal teams lacked the bandwidth for consistent outreach. Although it often takes 5–15 touchpoints to secure a meeting, most teams stop after 2–3, leading to low advisor engagement.

## The Current State

**Goal:**  
Increase advisor meeting rates for wholesalers through disciplined, high-touchpoint outreach.

**Our Solution:** Implemented a disciplined calling model that ensured consistent outreach, meaningful advisor engagement, and increased opportunities to connect.



Trained associates by former wholesalers executed 100–125 outbound calls per day.



Real-time analytics from AirCall and precision-targeted data from FLX Networks guided every interaction.



Automated follow-ups through HubSpot kept campaigns on track and maximized conversion potential.

## The FLX Advantage

### Cost Savings



- Reduce staffing costs 50–70% vs. in-house teams.
- Reduced wasted outreach, saving \$14K+ monthly (\$20K–\$30K in-house vs. \$6K–\$15K outsourced).
- Eliminated 100% of external data costs with FLX's precision targeted segmentation.

### Growth Potential



- Delivered 15,230 advisor meetings across 2024 + 2025 YTD, fueling pipeline growth and direct sales opportunities.
- Sustained a consistent 6% conversion rate, keeping prospects engaged and moving through the pipeline.

### Productivity



- Data-driven targeting expanded advisor reach, improving output by 40–60%.
- Increased advisor coverage by 40–60%, ensuring more qualified meetings and stronger sales follow-through.