



Deft Research provides focused, applicable information to health product and marketing teams for more confident and productive project implementations.

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CASE STUDY: UNDERSTANDING BROKERS AND AGENTS

The Challenge

Our client was receiving anecdotal feedback from agents and inside sales that the Medicare Advantage product line had no effective points of market differentiation. This discussion had been going on for several months and the client felt it was time to do something.

The Approach

The client approached Deft research with the need to understand agent and sales perceptions better. Deft developed an innovative approach that combined the benefits of focus groups with the efficiency of the telephone. We organized agents and sales people into triads to be interviewed together in a telephone conversation. We were able to keep the triad members in the same region but because the interview was by telephone, triad members could be from separate cities. This method also led to very few cancellations and, in the case of the few, it was relatively easy to reschedule the meeting.

The telephone triads were led by Deft's top personnel, interviews were recorded and transcribed. Our deliverable included audio clips of the actual statements made. This helped the client understand the intensity and emphasis of comments.

Results

The client learned several things that led to better communications with agents and sales and new emphasis on product development and marketing.

- The perception of lack of differentiation split agents and sales into two groups: those who could differentiate the product from others and those who could not.
- Agents and sales people articulated several elements of brand identity and market positioning which were incorporated into corporate marketing.
- Agents and sales people also offered ways to improve products and services. These views were prioritized by Deft in order of frequency and intensity of feeling.