

Case Study

Securing the Chain of Lead Distribution

Assumed's Chat With iRelo

Objectives

To explore how iRelo, a lead generation company in the auto transport and moving industries, has leveraged Assumed's contact vetting solution to address the challenges of lead reselling, quality assurance, and partner management. The case study aims to highlight iRelo's journey from manual testing processes to adopting Assumed's technology, detailing the benefits, insights gained, and the overall impact on iRelo's operations, client relationships, and customer experience.

Solutions

Moriah Smith from iRelo sits down to discuss how their company, with roots in the auto transport and moving industry, has evolved its lead management practices to address these challenges head-on. Through this conversation between Scott from Assumed and Moriah, we'll uncover iRelo's approach to ensuring lead quality, fostering transparent partnerships, and leveraging technology to keep their network honest and efficient.

Benefits

Efficient Partner Vetting

With Assumed, iRelo streamlined vetting, swiftly identifying and addressing partners who don't meet their strict lead handling standards. This replaced the old, manual process with a faster, more reliable system.

Centralized Data and Visibility

Assumed serves as a centralized hub for decoy contacts, allowing iRelo to monitor partner communications. This visibility ensures the lead's journey is transparent and manageable.

Unauthorized Contact Detection

Detecting unauthorized lead reselling or misuse became simpler with Assumed. iRelo can now quickly spot any irregularities, safeguarding lead integrity and value.

Streamlined Partner Management

iRelo's partner management has become more efficient thanks to Assumed, allowing for better communication and oversight. This has made managing relationships and expectations with partners much smoother.

At a Glance

Challenges

- Preventing Lead Reselling
- Minimizing Excessive Contact Attempts
- Manual Testing
- Performing Partner Due Diligence

Benefits

- Efficient Partner Vetting
- Centralized Data and Visibility
- Unauthorized Contact Detection
- Streamlined Partner Management



"If a client brings an issue to our attention, for example they believe another client is double selling quoting the leads, this issue takes precedence over all the other problems."

The Interview With Moriah From iRelo and Scott From Assumed



Scott: Tell us a little about yourself and iRelo? What is iRelo's story? Can you provide a brief overview of iRelo's core products? Who is your ideal customer? What are your responsibilities at iRelo?

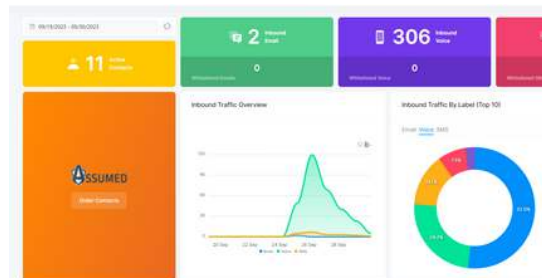
Moriah: Irelo has been selling leads since 2005. The owners previously owned an Auto Transport company and had connections with other auto transporters and moving companies. These industries often coexist in the same workspace; i.e., if moving a car nationwide, you are typically also moving your household goods.

When the internet started gaining traction and popularity with the general public, they saw an opportunity to expand their advertising reach beyond the Yellow Pages. The number of leads generated far exceeded their expectations. A need to sell or share the leads was identified, and we soon started selling them to other auto transport companies. We soon realized that household moving **companies could benefit from this** as well. We began contacting our network to inquire if they were interested and began developing our moving vertical. Over the last 19 years, we have built our network of both Household Movers and Auto Transporters and a few other vertices like International Shipping Companies, Home Security Companies, and Medical Alert Companies.

The ideal customer for Irelo is open to innovative ideas and wants to work as partners because we can only **continue to be successful** if our clients are. It is also a company that understands that most consumers want to "shop" the competition and get a few bids on their move. Even if they were sold an "exclusive" lead, the prospective customer would likely shop the competition.

*"I have personally worked for the company for the last five years, mainly in client management and sales. A big part of what I do is **ensuring our lead quality** is up to standard for our clients and researching any trouble areas that may be brought to our attention. We firmly believe that using data and reporting is the only way to find stress points for our clients and consumers."*

- Moriah



Scott: We already have an existing relationship with iRelo as a client of boberdoo, which Assumed also uses. Can you talk a little about how you use the boberdoo lead system?

Moriah: Yes, we used boberdoo for years and Assumed has a relationship with boberdoo, which is how we got introduced. It is crucial for us to work with companies that are willing to put development into new ideas we have and work with us on constantly changing what we can offer our current and prospective clients.

Scott: *Let's discuss the issues or pain points that led to using Assumed's contacts. What issue or problem are you trying to solve in general? How did you find out the problem existed? Was there a defining moment or something more subtle? We assume there was some investigation. Can you talk about that process, or is it possible to develop one? What did you do next?*

Moriah: We started using Assumed to track how clients were using our leads. First, ensure that no one is reselling data, and second, do not abuse the data with excessive calling and texting. We have done and tested this since the start of our business through various techniques and outlets to ensure we are **delivering the best experience** to our customers. We periodically do this to ensure all companies in our network properly work these leads and when someone brings to our attention that a company on the network may be abusing the leads. Leads can get expensive for our clients. We have occasionally found clients that may be double quoting, and we simply cannot have that happening as it lessens the quality of the lead for all involved.

Scott: Before Assumed, walk us through your process for vetting. Did you have to order anything off the internet? How did you determine what was needed? How did you track the contacts, where they went, and what activity they received? Were you able to take any actions based on this process?

Moriah: *Before Assumed, I would create multiple email accounts and use a burner phone app to do our testing of clients. It was challenging to keep track of the data collected without labels. I would use an Excel spreadsheet to track how many times a specific telephone number called leads, and I often needed help to keep everything straight. We would also use burner email addresses that expired, and in doing so, we could not always see client follow-ups. I could take action and speak to clients, but it was harder to compile data to prove my findings and ensure I could re-test if needed.*

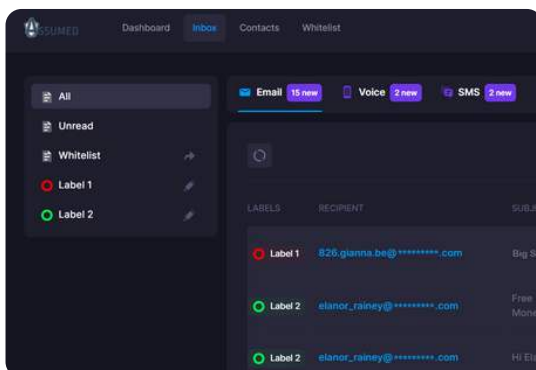
Scott: Can you discuss these challenges of manual testing that other clients face with manual testing, such as the time-consuming setup, implementation, and monitoring processes? How do issues like measuring results, scaling the process, manually entering data and sharing results within the team impact their operations?

Moriah: **The monitoring of manual testing was the most challenging part; I would have to focus on emails all day and sometimes only be able to test one company per day to be able to keep track of it. The burner and email app costs would increase as I was double paying for contacts and had to order a new one for every test run.**

Scott: *Moriah, could you walk us through your vetting process with Assumed? After ordering an Assumed contact, what are the next steps you take with that information? Do you have specific partners in mind for matching leads? How many seeded contacts do you typically submit per session, and do you test partners in batches or more precisely? Would you describe your approach as casting a wide net or taking targeted shots? What determines the frequency of your testing – is it time-based, percentage of leads, or something else?*

Moriah: My goal is to put a test lead through our system once a day to compile the data of the responses received. If there is something that does not look right from that lead, I will go back in and specifically retest the client that caused the "red flag." When testing on a broader scale, I will put the lead through using the form on our website as if I were a consumer (double testing our site and the text verification functionality at the same time); this provides a randomized sample of clients that get matched in boberdoo. Should I receive data that is amiss, I will go into the **forms manager** function in boberdoo and do a manual entry directly to that specific client.

If a client **brings an issue to our attention**, for example they believe another client is double selling quoting the leads, this issue takes precedence over all the other problems.



Scott: Regarding your findings with Assumed, have you been able to take any actions based on the activity data? Out of the partners you checked, how many were identified as reselling leads? Can you share specific examples where Assumed detected anomalies? If partners were caught selling leads inappropriately, what steps would you take? Overall, what has been the impact of vetting partners with Assumed for iRelo and your customers? How have they benefited from this process?

Moriah: At this point, we have tested all companies that are a part of our network. We have had to remove a few clients who were double-quoting leads. When this happens, we always address it with the client and give them an opportunity to rectify the situation. I will then test them on a weekly basis as well as being added to our "test regularly" list. They only get this one opportunity to correct their actions; if caught reselling leads again, they are off the campaign, and we will not sell them leads again. We like to be fair with a one-time opportunity to make it right, but we take reselling leads very seriously as it hurts everyone's bottom line. Removing the clients that may be of lesser quality than we would like and who do not work the leads correctly makes it easier for our clients to get ahold of people. We also have had conversations with specific clients about the number of times they contact the prospective customer within the first day of receiving the lead – we also want the experience to be good for the consumer. We have also used Assumed to let clients know that their sales team may be slacking and inform them of the length of time it takes for their team to make calls. We've also suggested to some of our clients that they look into getting an automated email set up if we do not see one go out from the client.

Scott: What was the most interesting insight you gained from analyzing the activity data in Assumed? How has Assumed directly impacted your approach to partner management and due diligence? Have you integrated it into your overall processes, and if not, do you plan to do so in the future? Compared to manual testing, what would you say is the biggest benefit of using Assumed? Would you recommend Assumed to other lead generation companies for vetting their data partners?

Moriah: We already knew about the activity with clients, but Assumed has streamlined the process and made my life easier! The testing can happen a lot more frequently, and we can better manage the data to pinpoint stress points with clients and consumers. I plan only to use Assumed for the testing of clients and our due diligence process. The **benefits** of having all testing in one place and a place to go to retrieve the data have been instrumental for our data collection, review and the management of our clients. I recommend Assumed to other lead generation companies as it helps with organization and ensures that your **leads and data are used properly** and fairly for all on the campaign.

Wrapping up our talk with Moriah, it's clear that iRelo's step away from manual checks to leveraging Assumed's vetting abilities has been beneficial. The big takeaway? Embracing innovative solutions like Assumed doesn't just streamline operations; it boosts the overall quality of leads, ensuring that both iRelo and its clients are set up for success. This isn't just a win for iRelo but a win-win for everyone involved, proving that a bit of vetting can enhance efficiency, partner relationships, and customer satisfaction. Any lead generation company looking to level up should take a page from iRelo's playbook because staying ahead means staying innovative in the world of lead distribution.

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