Case Study – Driving Volume with a High-Powered, Emerging Call Center Agency

Pivot Health by healthcare.com®

The Challenge

The Benefits Boss, a high-volume national call center agency, needed a short-term medical (STM) solution that could integrate seamlessly into their scripted telesales workflow after the 4-month STM rule took effect. Clients often dropped coverage after just one policy cycle due to re-underwriting requirements, leading to shorter customer relationships and higher administrative overhead. This created mounting frustration for agents and a noticeable decline in policy lifetime value.

The Approach

The agency worked closely with their Pivot Health Account Executive to train producers on Continuous Coverage STM, available exclusively through Pivot Health by Healthcare.com. They launched internal webinars, updated quoting workflows, and activated carrier appointments with Pan-American to unlock access. Emphasis was placed on pitching the product as a seamless 12-month solution with one-time underwriting, simplifying the agent experience and offering greater peace of mind for clients.

The Results

Within two months, the agency saw meaningful adoption among its most active STM producers. The transition led to fewer client drop-offs, improved coverage continuity, and significantly higher average commissions. Continuous Coverage STM has become a staple in the agency's portfolio.

Through broader Healthcare.com collaboration, lead targeting was refined, delivering higher match quality and better policy retention.

From the Agency

"Pivot Health has become a go-to for our agents. The ease of quoting and reliability of the platform helps us convert efficiently—especially on calls where timing and simplicity matter most."

Dakota Myers, Founder & Principal at The Benefits Boss

+40%

Total Sales of Pivot Health Products YoY in 2025

20%

of Pivot STM sales are longer-duration (multi-carrier Continuous Coverage STM)

★

Most popular plan is Epic Base featuring all provider access (no network restrictions)