



## **Case Study: Outsource Telemarketing**

### **Nicola Sunderland, IFA, Countrywide Estate Planning**

“Using Lisa Stimpson and Outsource Telemarketing is fantastically profitable for me, on all sorts of levels”, says Nicola Sunderland, who is an Independent Financial Advisor working literally countrywide with Countrywide Estate Planning. “I’m so busy travelling and attending appointments with clients that having Outsource Telemarketing organising and setting up those appointments is invaluable.”

Outsource Telemarketing call existing customers of Countrywide to encourage them to consider additional protection not already in place. Nicola advises in the specialist areas of inheritance tax planning and funding long-term care and as a result many of her appointments are with elderly clients. “Lisa strikes exactly the right note on the phone. They like her, they feel safe with her, and they trust her and don’t feel threatened as she is never too pushy in obtaining an appointment. Consequently, the appointments themselves are positive from the outset, with never that feeling that the appointment has been made just to get her off the phone. As a result, the success rate in the appointments is high.”

Nicola uses Outsource Telemarketing on an ongoing weekly basis to provide a steady stream of high quality appointments. “The time, the worry and the stress of finding and setting appointments, all that has been taken away, allowing me just to concentrate on the core part of my job. The relationship works really well, all aspects are conducted with great efficiency and professionalism and everything is based on total honesty and integrity, and in having my best interests at heart. If you need appointment setting, then try Outsource Telemarketing.”

Nicola Sunderland  
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