

## Case Study – Insurance

### *The Client*

A long established, 36 partner commercial practice, with a single office in the North West, renowned for their niche expertise in sports and insurance law.

### *The Services*

Defendant handling of Professional Negligence and Personal Injury insurance policy claims, on behalf of insurance companies and underwriters.

### *The Brief*

The firm had gained an enviable reputation in the areas of Personal Injury, particularly in respect of “catastrophic” medical claims (top tier ranking by Chambers & Partners for handling PI defendant claims), and Professional Negligence (ranked first in the North West by Chambers, and top tier by the Legal 500).

Their client roster included a number of both nationally and globally renowned insurance companies and underwriters, including Lloyd’s Syndicates, on whose legal panels they sat with the view to being allocated defendant work as and when claims were made on the relevant insurance policies.

The firm’s Managing Partner, who also headed their insurance team, instructed Chartered Developments to contact a number of insurance companies and underwriters on their behalf, with the view to gathering information about their existing panel arrangements, and on what basis they tended to review the performance of the law firms they worked with.

### *The Target*

Given the highly specialised nature of the sector, the client supplied a lean database of approximately 100 targets, split approximately 65-35 in favour of professional negligence insurers/underwriters. Each record supplied consisted only of the company name, their address and telephone number. Decision maker names and titles were unknown, and difficult to obtain, because such information was not available in the public domain at that time.

With guidance from the client, decision maker titles were assumed to include, but not be restricted to:

Claims Director / Manager / Controller  
Divisional Manager for Liability

Director of Legal Services  
Head of Legal

### *The Campaign*

Contracting to 20 hours per month over a period of 3 months, the calling campaign had three aims:

1. To identify the key decision maker responsible for panel appointments, and that person’s physical location in the UK
2. To establish contact with, and engage the decision maker in dialogue, introducing the Client’s considerable experience in the area of defendant claim handling, establishing the prospect’s current panel arrangements and review thereof
3. To arrange, where possible, an informal meeting between the client and the decision maker, with the view to being added to the prospect’s legal panel in the future

A target of 9 appointments was agreed with the Client, on the basis that brand awareness was believed to have been sufficiently high, particularly for Professional Negligence.

### *The Result*

By the end of the three month period, a total of 12 appointments were generated. As a result, the client agreed continued calling, albeit at the rate of 10 hours per month, for a further 6 months, in order to follow-up agreed “call backs” to prospects who had requested them from the initial rounds of activity, and to close out calling on the remaining data. Eight more appointments were secured during the additional calling.

A number of months into the campaign, the Client confirmed they had received, without being added to the panel, four instructions from one Professional Negligence underwriter (worth in the region of £30k), and had been added to the panels of a further three, one of which was the Personal Injury panel of a nationally known organisation.

This was a successful campaign, being the result of the Client’s reputation and standing within the sector, coupled with a highly focussed calling regime.