

CLIENT: iPipeline
INDUSTRY: Financial Cloud Services
BUSINESS MODEL: B2B
WEBSITE: www.iPipeline.com

 iPipeline™



"Ross Shafer is a singular commodity. If you need a pro to deliver a great motivational and leadership message with well-placed humor, Ross is your man. My 600 customers left the event energized and ready to storm the hill!"

Mike Persiano - Chief Marketing Officer



CASE STUDY

THE CLIENT: iPipeline is a leading provider of cloud-based software solutions for the life insurance industry (including financial advisors). Through our SaaS solutions, we accelerate and simplify insurance sales, compliance, operations and support. We provide process automation and seamless integration between every participant in the life insurance industry including carriers, agents (such as financial advisors and independent insurance agents), distributors (such as banks, broker-dealers and general agencies) and consumers. Our innovative solutions enable automated processing for pre-sales, point-of-sale execution of applications, post-sale support, reporting, consumer delivery and agency management.

iPipeline provides the process automation and seamless integration needed on a global basis to make a sale by aggregating more than 120 carriers, 875 distributors and financial institutions, and their producers and licensed advisors in a cloud-based environment. With headquarters in Exton, Pennsylvania, iPipeline has locations in Atlanta, Charlotte, Cheltenham (UK), Fort Lauderdale, Philadelphia, Salt Lake City, San Francisco, Tokyo, and Vancouver.

THE CLIENT'S OBJECTIVES: Each year iPipeline conducts an annual user-group appreciation conference in Las Vegas. The theme was *Connections Are Everything* and the primary objective was to bring together the entire business network; distributors, vendors, business development, and broker-dealers. The audience consisted of executives, case managers, sales, business development, and IT professionals. Because the iPipeline™ customer is typically a CEO, CIO, CTO, VP of Sales, Managing Partner, Principal, or company President, the keynote speaker must approach his/her content from a very high-concept level – yet keep it entertaining enough to hold the attention of a discerning crowd.

ROSS'S DELIVERABLES When Ross Shafer was chosen as the keynote, the client invited Ross to attend the opening gala reception; which was a unique opportunity to meet CEO Tim Wallace, other senior leaders, as well as a good many user members. Those conversations informed Ross's remarks for the next day's keynote program, "Nobody Moved your Cheese." (No excuses. No blame. No surrender). Ross enlightened the audience about best practices that can be cross-pollinated from outside the insurance and financial services industries (become a peripheral visionary). Ross's tone revolved around accountability and taking responsibility for one's own success. He reinforced the advantages of iPipeline's cloud-based software as "the most relevant solution in a world where fast is the new slow." Ross also gave practical techniques for finding competitors that are hiding in your blind spot.

