

## Case Study

# How an Independent Insurance Agency Streamlined Compliance & Doubled Campaign Agility with CallShaper





Client : **Tyler, Insurance Agency Owner**  
Industry : **Insurance, Medicare**  
Use Cases : Medicare Enrollment  
Key Features Used : Twilio, Aircall.io, JustCall.io



# The Challenge

Tyler operates a performance-based insurance call center that serves highly regulated campaigns — especially for Medicare recipients. His operation demands fast test-and-launch capability, strict compliance, and clean call reporting.

After leaving CallShaper, Tyler pieced together a system using Twilio for voice, SendGrid for email, and a rotating mix of JustCall.io and Aircall.io for dialing. While affordable on paper (~\$35 per seat), the setup came with significant tradeoffs:

- Manual lead loading and call logging
- No seamless CRM integration
- Inconsistent call recording access
- Developer dependence for anything custom

"It got the job done, but it wasn't efficient. When you need to pivot fast, that kind of tech stack slows you down."



# The CallShaper Solution

When revisiting his platform strategy, Tyler pinpointed CallShaper's strengths:

## Instant Deployment

"I can spin up a new campaign in under two hours with no devs — that's insane."

## Built-In Compliance Logic

CallShaper uses the most conservative interpretation of time zone compliance by combining phone number and physical address.

## CRM-First Integration

It feeds call history, recordings, and lead outcomes directly into Tyler's custom-built CRM.

## No-Code Scripting + IVR

"I don't need an engineer to make logic changes. I can do it all myself."

## Lead Testing Agility

Ability to trial new campaigns or lead sources quickly without technical bottlenecks.



# Results & Impact

"There's nothing else I've used that lets me move this fast and stay this compliant. CallShaper is built for people like me."

 <b>Cut Setup Time by 80%</b>	From 2-3 days with Twilio stack to same-day setup	 <b>Reclaimed Agent Time</b>	Simpler interface + reduced training time
 <b>Reduced Compliance Risk</b>	Automated DNC scrubbing, lead match validation, litigant suppression	 <b>Simplified Tech Stack</b>	Eliminated 3+ tools while gaining new capabilities

**Next Move:** Tyler is now considering layering CallShaper with a white-labeled Medicare agent CRM to scale across affiliate agents.