

AR Agency Revolution

CASE STUDY

Background

Based in Utica, Michigan, Action Insurance Service is a single location agency serving more than 2,700 personal and commercial lines customers. In 2018, Action Insurance started looking for a solution to grow their book of business and improve customer communications. Agency Revolution stood out due to our depth and breadth of experience in the insurance industry, our library of pre-built campaigns, and our seamless technology integration with Vertafore's AMS360.

Challenges

In thinking about how to grow their agency faster, the Action Insurance Service team realized they were holding themselves back by relying too much on direct mail and cold calling. They needed a way to communicate with customers and prospects quickly and easily, and at scale.

When introduced to how Agency Revolution's Fuse™ platform, they loved that it went beyond simple email automation. Because Fuse™ integrates directly with Vertafore's AMS360 management system, they could segment their marketing messages to automatically reach out to lost customers, cross-sell to monoline customers, keep existing customers aware of important updates, and so much more.

We looked at other solutions, but those didn't have the management system integration. With all the law changes in Michigan right now, the fact that Fuse™ documents all customer communications in AMS360 is so powerful for us. The other systems didn't do that.



Holly Rossell
VP of Operations

I love looking at the Fuse Dashboard everyday. I like keeping an eye on where our business is going, how we're increasing in sales and policy counts, and how our campaigns are performing.



Timothy Hays
Account Executive





Action Insurance Service uses Fuse™ to deliver urgent updates in a timely manner, such as alerting customers about how a government shutdown caused insurance companies to defer premiums for a limited time. “We never would have been able to get that notice out if we didn’t have Agency Revolution,” said VP of Operations Holly Rossell.



To set client expectations, Action Insurance Service uses a five-step welcome campaign when new policies are made active. It starts with an alert to the account representative to watch for communications from the new policy-holder. It is followed by emails thanking the customer for choosing Action Insurance Service, sharing their representative’s contact information, inquiring about their experience so far, and advising them of the claims process.



They’ve used the integration with AMS360 to make sure Important updates and communications sent from Fuse™ also get documented in AMS360 – keeping their data clean keeping everyone on their team accountable.



Fuse™ allowed Action Insurance Service to build a lead capture form to capture quote requests integrated directly on a carriers website.

Results

Action Insurance Service has steadily grown its business since becoming an Agency Revolution customer. From boosting customer retention through good communication and engagement, to increasing the number of policies per customer with cross-selling campaigns, to gaining positive online reviews from thank you messages and review campaigns, the agency is on a clear path to growth. The impact of these campaigns is easy to see thanks to the Fuse™ Dashboard. “I love looking at the Fuse Dashboard everyday. I like keeping an eye on where our business is going, how we’re increasing in sales and policy counts, and how our campaigns are performing,” said Account Executive Timothy Hays.

Since Action Insurance Service has stepped up their communication, customers have shown their appreciation by leaving online reviews on Facebook and Google.

Agency Revolution has allowed Action Insurance to:

- ✓ Earn a 5 out of 5 rating on Facebook and 4.5 out of 5 rating on Google
- ✓ Increase their client retention rate from 92% to 95%
- ✓ Triple their client outreach while maintaining positive feedback and an average open rate of over 40%
- ✓ Raise their average policy per client from 1.8 to 1.87
- ✓ Take their positive online review count from just 2 to more than 20