



Insurance Broker Focuses on Sales and Customer Service, While Automation with GoldMine® Takes Care of Busywork

Ask any employer about their top challenges and employee benefits is likely to come up. To navigate this often difficult business issue, companies and individuals throughout California turn to Sonoma-based RealCare Insurance Marketing. As a broker, the 15-person firm helps businesses ranging from two to 2,000 employees design and implement employee benefits programs.

RealCare also serves as the broker of record for the California Association of Realtors®, insuring about 8,500 of the association's more than 150,000 members. The booming California real estate market has kept the association's membership expanding, which in turn has fed RealCare's growth. The past two years, the company has doubled the number of people it has enrolled.

As with any insurance firm, annual enrollment of customers is a major yearly event. From March to June each year, RealCare takes dozens of calls daily from prospective customers wanting information about various insurance plans or from renewing customers who need help deciding whether to make changes. After calls, each contact receives different information depending on their needs and interests.

Because Realtors® are out showing properties much of the time, when they call in, RealCare needs to take the call immediately. If staff members must return a call, chances are good that they won't reach the Realtors®. In the past, however, staff spent a significant amount of their workdays getting information ready to be mailed out, taking time away from the phone.

Typically, they would run mailing labels and print generic letters at the end of the day. As a result, some staff members had to work overtime in order to get the literature in the mail the same day. The process itself was cumbersome, and during particularly high-volume weeks, could take a couple of days to get information

mailed out, leading to more calls from prospects and customers asking about their information.

"It's extremely important to us to take a call on the first try, help them and get them on their way," explained Pat O'Brien, vice president of group sales at RealCare. "We needed the literature fulfillment process to be as automated as possible so we could get on to the next call easily. It was a tall order."

Automating, Expediting Information to Customers

Sales Compass Automation Solutions, a FrontRange Solutions partner in San Rafael, California, accepted the challenge. The partner began with one essential, time-saving step: integrating the firm's GoldMine® contact management system with its Access database to eliminate double data entry. Sales Compass used the GM+View tab in GoldMine to allow RealCare to enter customer information once in GoldMine, and then populate it in the Access database. That enables staff members to view and change Access information right from GoldMine.

Next, Sales Compass took on RealCare's literature fulfillment needs. The partner created an automated literature fulfillment process by customizing GoldMine and bringing in OmniRush® from Z-Firm LLC. When talking to a contact, RealCare staff members simply click on a customized button in GoldMine called "Lit Picker."

From there, they select specific literature to mail to prospects and clients. To speed delivery, RealCare and Sales Compass also created automated processes to allow for fax or email options for electronic literature fulfillment. With customized buttons on the GoldMine desktop, staff members can simply and easily generate a fax or email transmission.

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Then, PrintRush®, FaxRush® and EmailRush®, from the OmniRush family of products, automate the steps of printing, faxing and emailing information out to contacts. These applications pull a contact’s information from GoldMine to get the right materials to each person in the designated way. For mailings, the system prints out the customized cover letter, as well as a face sheet with the customer’s address and a code that indicates which brochures or other information should be included in the mailing.

For mailed items, a staff member simply collects the appropriate materials based on the literature code, puts them in an envelope and deposits them in the outgoing mail. This process enables RealCare to get literature out as it takes calls so the flow of information occurs throughout the day, rather than in a bulk at the end of the day or the next day.

Sales Compass also automated the next phase of the enrollment process, the step in which RealCare receives dozens of applications each day that have to be processed. In the past, customers frequently called to check on whether the firm received their applications. The partner customized GoldMine so that, when an application comes in, staff simply hit one button in a contact record and an automated email goes out letting the person know his or her application was received – again reducing calls.

With each step, GoldMine notes in a contact’s history record exactly which information the person received, when it went out and who talked to the contact. If that customer calls in, RealCare staff members can quickly let them know when something was mailed, faxed or emailed.

“History records are really important because customers get very antsy during open enrollment,” O’Brien said. “Now we have an easy method to see when information went out, which cuts down on the number of calls we need to return.”

Sales Compass further customized GoldMine to help track sales commissions, which RealCare previously entered manually on an Excel spreadsheet. The partner created a form that synchs dynamically between Access and GoldMine to gather premium and commission details from Access. At the end of the month, RealCare reconciles the commission statements and runs a report that shows commissions that should be paid.

Faster, More Responsive Customer Service

By automating much of the fulfillment process, RealCare has seen a significant business impact. The firm reduced by 60 to 70 percent the time it takes for an individual to prepare information and get it out. Additionally, mailings go out, on average, about 30 percent faster.

Whereas RealCare previously received about 100 calls every few days from people that had not yet received their packets, the firm rarely receives calls now of that nature because mailings reach customers so quickly. Before, customers might receive mailings in four to five days. Now they often receive them in one to two days.

RealCare has also seen a 30 percent decrease in calls from people wondering whether the firm has their application. “Again, that’s allowing us to take critical first-time sales calls and do more proactive service work,” O’Brien said. “In the past, it was all reactionary, just trying to keep up with those phone calls. It’s made a huge difference. We can focus more on sales and customer service.”

RealCare also credits automated processes for enhancing the customer experience, which drives referrals. RealCare typically returns calls in an hour now, compared to 24 hours before, since the overall number of calls needing to be returned is down about 50 percent.

AT A GLANCE

Customer:
RealCare Insurance Marketing, Inc.

Industry:
Insurance

Employees: 15
GoldMine users: 15

Products:
GoldMine® Corporate Edition

FrontRange Solutions Partner:
Sales Compass Automation Solutions, Inc.

GoldMine Business Benefits:

An automated literature fulfillment process allows RealCare to reduce by 60 to 70 percent the time it takes to prepare information for mailing.

Mailings go out, on average, 30 percent faster, often reaching customers in one to two days instead of four to five days.

With automated communication, RealCare has also seen a 30 percent decrease in calls from people wondering whether the firm has received their application.

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O'Brien points to Sales Compass' creativity and solution-based focus as key to helping the firm realize such significant results. "Other consultants were too technology focused, but Sales Compass makes an effort to understand our business so they can apply technology to our needs," O'Brien said. "They make a huge effort to understand our business and that makes all the difference for us."



About Sales Compass Automation Solutions, Inc.

Sales Compass Automation Systems is a leading integrator of sales force automation, customer relationship management, and local and wide area networking-based business solutions. Since its founding in 1983, the company has successfully served hundreds of businesses throughout the San Francisco Bay Area and the country. Sales Compass deploys real-world implementations of technology, integrating sales into all parts of a client's organization to improve their productivity and profits. For more information, call (415) 258-0965 ext.101, e-mail to: sales@salescompass.com or visit www.salescompass.com.

About FrontRange Solutions

FrontRange Solutions develops award-winning software and solutions used by more than 130,000 companies and over 1.2 million users worldwide to manage a wide variety of business relationships and provide exceptional service. FrontRange product families, designed specifically for small-to-medium-enterprise (SME) and distributed enterprise organizations include: GoldMine® for Customer Relationship Management (CRM); IT Service Management with HEAT® and ITIL® standards-based modules for complete service management; Communication Management including IP Office, GoldMine IP Voice Suite and IP Contact Center for reduced telephony costs and increased agent productivity, streamlined customer service and communications; and Infrastructure Management, which provides the ability to optimize the full lifecycle of a company's assets. Customers representing 44 percent of the *Fortune* 100 and 76 percent of the FTSE 100, include Coca-Cola, Shell Oil, Prudential Securities, Électricité de France, Mack Trucks, Campbell Soup, Avaya, Bechtel Corp, Bank of America, and Turner News Network. For more information, call (800) 776-7889 or visit www.frontrange.com.

GoldMine Business Benefits, cont'd.

Because RealCare can take calls as they come in, the overall number of calls needing to be returned is down about 50 percent.

By reducing the amount of time preparing information and returning calls, reps can do more proactive sales work and focus on customer service.

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