

**Industry:**

Insurance

Description:

Specialist UK Insurance Brokerage advising, arranging, and assisting in the administration and performance of insurance contracts for professional indemnity insurance

Business Challenge:

Centralized knowledge base to facilitate communication with customers, streamline business processes and target marketing on mass or individual levels

Product/Solution:

Commence RM, an award-winning customer relationship management solution, helps businesses capture, manage and share information across the organization

Key Features:

- *Easily customizable by non-technical staff people
- *User-friendly application
- *Integrates with other software applications
- *Powerful relational database
- *Robust reporting capabilities

Results:

- *Eliminate the need for redundant data entry, ensuring better database integrity
- *Easily capture, track, manage and share information, creating efficient sales process
- *Tailor marketing programs to individual prospects or specific target segments
- *Gain insight to customer demographics, behaviors and needs
- *Ability to create and export reports for greater business intelligence
- *Fulfillment of process control – helping to manage the process of insurance brokering

Insurance Brokerage Streamlines Business Processes, Increases Marketing Effectiveness and Ensures Greater Customer Satisfaction with Commence RM

Paul James established the Sennet Group of companies in 1994 and founded Legalrisks.co.uk (a trading style of Sennet Professional Risks Limited) in 2006. Located in Kent, U.K., it is a specialist broker in professional indemnity insurance, legal risks insurance and an underwriting agency. Legalrisks.co.uk is an independent intermediary that acts as an agent (under the auspices of The Financial Services Authority) and has agencies with a number of insurers. It is dedicated to providing the very best in legal insurances to its clients.

Maintaining a competitive cost structure is paramount to success in these turbulent times, particularly in the insurance industry. With intense competition, companies need to have more than just top quality products and services; they also need to be strategic in acquiring new customers and have systematic business processes that speed the conversion from prospect to client.

“To remain competitive, we needed to figure out how to do things more cost-effectively and have better control of our internal cost per client,” said Paul James, CEO, Legalrisks.co.uk. “We have a target plan to grow our customer base by two fold over the next five years that requires effective marketing and understanding client preferences and how to interact with them.”

The Commence Solution

To streamline office procedures and strategically market insurance products to clients, Legalrisks.co.uk relies on Commence RM. Commence Corporation’s “best in class” CRM software offers a comprehensive suite of applications for business contact management, sales and sales force automation, marketing, campaign management, lead management, project management, customer support and analytics.

“I have been using Commence for 15 years and have stayed with Commence because it does everything I want it to do,” said James. “It enables us to reduce the time it takes to assess a prospect’s information and take them forth from prospect to client. Thereafter it provides communication capabilities that enable us to do specific-marketing either on an individual level within the client base or mass marketing as needed. The system has been modeled around our requirements. I efficiently control all aspect of our complex policy management.”

Prospects cover a range of industries such as architecture, accounting, professional consultancies and law, each requiring a specialized set of products and marketing strategy. Through Commence, the company is able to use the solution’s sorting features to identify the right targets and conduct marketing-specific initiatives.

“With Commence, what you see at the front is very simple, but what sits behind it is this incredible flexibility that enables users to have whatever performance they need it to do,” said James. “After we enter clients into the system we have the ability to correspond with them in an electronic format as well as creating a log of the type of insurance they buy and from which supplier. Commence RM then enables us to do all sorts of cross referencing by the way we log the details respective to any one person or client.”

In addition to having visibility into client purchases and preferences, Legalrisks.co.uk also relies on the system to provide accurate and rapid quotes to clients. Wanting to eliminate the need for redundant data entry, the leading UK Commence agent, TPS Consulting, tailored the system to include drop down menu options for product quotes.

“We wanted to be able to quote prices for different products very quickly,” explained Paul. “Instead of us having to enter the details numerous times, we were able to use Commence’s template capability to automatically populate our data entry points thus eliminating the need for multiple points of entry. It creates a better process, is more user-friendly and when you make something slicker and easier to use it’s beneficial to all users.”

Another key benefit of Commence is its ability to adapt to Legalrisks.co.uk’s business processes versus requiring them to adapt their processes to accommodate the software. Like most insurance brokerages, Legalrisks.co.uk relies on rapid access to documentation when working with clients. Moving away from paper files to scanned documents six years ago, the company first looked at a document management system to serve as a “paper holder” but the systems they looked at would require them to change their database and workflow to accommodate a new system.

“Commence was again able to adapt to our business need and within a month we were able to create a link to the scanning solution,” said James. “Now I simply scan the document into my database and similar to the way we have integration with Microsoft Outlook through Commence, we have the same capability with our scanning solution.”

Commence also provides transparency for the company’s underwriters who evaluate the risk of potential clients and determine the premium that needs to be charged. In the past, underwriters needed to visit Legalrisks.co.uk’s office to see previously written policies. Now, underwriters with permission-based access can use an Internet connection to VPN into the system and access pertinent files, saving time in the process.

Although James is a long-time user of Commence, he has done his due diligence over the years and examined other competing solutions.

“We have looked at various CRM solutions, including all of the larger names and they just don’t stack up,” he said. “We would have to adapt our working procedures to the way their systems work and I don’t want to do that. Commence says we’ll do this the other way around – we’ll adapt our solution to fit your needs.

He continued, “The benefits of Commence are immense – we are able to rapidly access information, customize campaigns and have automated business processes that improve how we operate. Our company tagline is ‘you care for your business, we care for you’ and Commence enables us to stay in constant contact with our client base and be proactive in delivering products and services that meet our clients’ needs.”

About Commence Corporation

Founded in 1988, Commence develops and delivers a diverse suite of award-winning CRM products that integrate people, processes and technology. Delivered via the popular software-as-a-service (SaaS) model or implemented as on-premise licensed software, Commence CRM solutions are used by thousands of companies to streamline sales and customer service front-end business processes. As a result, Commence clients increase workforce productivity, generate positive customer interactions, and reduce cost. More information about Commence can be accessed at www.commence.com or at 1-877-COMMENCE.