

Recreation Insurer Forges Personal Connection with Clients



Sattler Insurance relies on integration of Cisco network and AMS 360 CRM application to deliver responsive service.

Challenge

For the past 30 years, the Sattler Insurance Agency has offered a rich array of commercial and personal insurance products. Located in Lewiston, Idaho, the agency specializes in property and liability coverage for recreational outfitters, including hunting and fishing, whitewater rafting, lodges, and more.

“We have developed a niche market for recreational outfitters,” says Nancy Sattler, principal owner of Sattler Insurance Agency. “We began pursuing this market about 25 years ago, and today we are the largest agency representing the largest group of outfitters in the United States.”

With clients spread throughout the country, Sattler Insurance depends on its phone system to market its products and assist customers with claims and other issues. “Our phone system is very critical to us,” says Sattler. “Although we are located in a small community, we are licensed in 38 states, so we market to a very large area.”

EXECUTIVE SUMMARY
SATTLER INSURANCE AGENCY <ul style="list-style-type: none"> • Industry: Insurance • Location: Lewiston, ID • Number of Employees: 12 employees
CHALLENGE <ul style="list-style-type: none"> • Maintain customer-centric company by delivering superior service to insurance clients across a wide geographic area
RESULTS <ul style="list-style-type: none"> • Integrated phone and CRM solution provides complete view of customer data to deliver more informed, responsive service
SOLUTION <ul style="list-style-type: none"> • Cisco Unified Communications for Small Business integrates smoothly with CRM application to display latest customer data the instant calls arrive

The insurance industry is highly competitive, and Sattler Insurance sets itself apart from other agencies by delivering superior service to its clients. To keep track of its diverse array of customers, the company depends on its network and business tools such as its AMS 360 customer relationship management (CRM) application.

“We strive for excellence and run at the front of the pack on technology,” says Sattler. “Our firm is constantly looking for new technology solutions that can help us serve customers better.”

Sattler Insurance uses the AMS 360 CRM application to store key client data such as contact information, policy details, claims status, notes from previous meetings, and account balances. However, it can take time to search and retrieve these records. When a customer calls, agents need to pull up this information fast to solve problems and issues right away.

To build on its commitment to quality service, Sattler Insurance needed a communications solution that would enhance its existing CRM application, to give employees a complete view of customers at the instant they phoned. The solution would have to be customizable to work smoothly with the agency’s business processes. And it would have to be scalable and flexible to take on new features as the agency grew and evolved.

Results

To give employees the tools they needed to deliver fast, yet informed service, Sattler Insurance replaced its antiquated phone system with the Cisco® Smart Business Communications System (SBCS). The Cisco SBCS was designed specifically for the needs of small business, and lets the company bring together all of its phones and networked applications on one cost-effective platform. Most importantly, the Cisco solution lets Sattler Insurance tie

its phones directly into its CRM software. When a customer calls, a pop-up window appears on the receptionist's PC, with all of their contact information and policy details.

"The Cisco and AMS 360 solution gives our receptionist almost instant knowledge of who is calling, and where the call needs to go," says Sattler. "It lets us avoid wasting time asking the insured person questions about their account. Instead, an agent can glance at the screen and say, 'I see you have both commercial and personal policies with us. Are you calling about your home or business?' That level of service makes the customer feel they are important to our agency."

Insurance agents also save time interacting with callers, because the solution automatically delivers a summary of the client's most important information on one screen.

"When the screen pops up, I can click on it and immediately access the customer details I need to see," says Sattler. "The integration between Cisco and AMS 360 lets our employees save four mouse clicks, or about 45 seconds, to get started working with a client. This may not sound like much, but on an average day, saving time on every single incoming phone call quickly adds up to a lot added productivity for customer service representative. We are able to get more done in a day without hiring more people."

If a client has an outstanding claim, the Cisco and AMS 360 solution displays its status in the agent's pop-up window as well.

"The claims window is a huge feature for us," says Sattler. "We can ask the client how the process is going, and find out if they have received a call from their adjuster. Anytime you can make your customer feel that you know about their issues and are in tune with what's going on, it makes them know that their business is valued. Cisco is right in step with us in understanding customer service, giving us the ability to service our clients faster and more efficiently."

Keeping agents up-to-date about clients' status is also helpful in identifying new selling opportunities. "The solution can be useful for 'upsell' opportunities," says Sattler. "For example, during a phone conversation we might offer the client a quote on a new auto policy, or discuss discounts for packaging some of their policies together."

The new Sattler Insurance network includes Cisco Unified IP Phones 7970, which feature color LCD displays and a rich variety of call features.

"The Caller ID function is huge for us, because it helps us minimize phone tag with our clients," says Sattler.

"Insurance is all about customer service, and we try to make the process as positive as we can when we are working with a client."

Solution

Nancy Sattler worked closely with Cisco's technology partner VocalMash to develop the integrated solution. VocalMash utilized the Cisco Smart Business Portal, a web services platform, to smoothly integrate the AMS 360 application with the Cisco Unified Communications Solution.

Using Caller ID, the Cisco solution matches the caller to their AMS 360 record. Then it instantly provides a pop-up window showing their contact information, policy details, and account status. When a call arrives, the Sattler Insurance receptionist sees up-to-date information about the client, and can quickly transfer the call to the correct person by clicking a mouse.

"The solution saves our receptionist three or four minutes in interviewing the customer to properly direct their call, so it's a huge time saver for our agency," says Sattler.

To change or update a policy, an agent can click to open directly to the customer record within the AMS 360 application. To comply with regulations, the AMS 360 application tracks all account activities and transactions.

If a customer has a question about making a payment, employees can access direct billing or agency billing information in seconds. Another single click takes employees directly to the AMS 360 carrier information page, so they can provide phone numbers and other information to clients.

The Cisco and AMS solution not only consolidates key information from the company's CRM database, but can also pull together information from resources such as Google Maps or news feeds.

"The map is a terrific feature because it can be a conversation starter," says Sattler. "I can take a look at it and see where the customer is located. It's just another way of building closer ties with clients."

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– Nancy Sattler, Principal Owner, Sattler Insurance Agency

Next Steps

The Cisco Unified Communications Solution was designed for growth and flexibility, to enable businesses to easily add new features as needed. Sattler Insurance has already begun to explore new ways to use its phone system to help employees be more productive, inside and outside the office.

"We have just upgraded our Cisco Unified Communications Manager Express application, and we are excited because it will enable us to convert voicemails to e-mail attachments," says Sattler. "This will enable our agents to receive and manage their messages even when they are working outside the office."

As it builds on its reputation for pleasing customers, Sattler Insurance is confident that its Cisco and AMS solution will help the company maintain its lead in serving a dynamic market in the years ahead.

For More Information

To learn more about the Cisco solution, visit <http://www.cisco.com/smallbusiness> or contact your authorized Cisco salesperson.



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