



## ACTION INSURANCE CASE STUDY

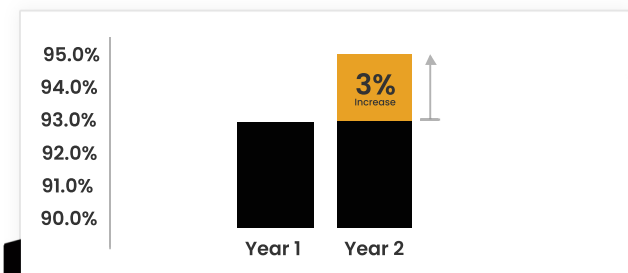
IMPROVING CLIENT RETENTION WITH

# MARKETING AUTOMATION

## OVERVIEW

Action Insurance Service, an independent insurance agency, partnered with Agency Revolution to enhance client engagement and drive positive online reviews.

By integrating Fuse marketing automation with AMS360, they tripled client outreach and increased retention by 3% in one year, leading to significant growth in client satisfaction and business performance.



**Retention Increase**  
**3% IN ONE YEAR**

## CHALLENGES

Before implementing Agency Revolution's solutions, Action Insurance Service faced several challenges that hindered their growth and client engagement.

1

### Limited Communication

Manual email communication and phone calls led to irregular client touchpoints and weak relationships.

2

### Manual Processes

The lack of automation consumed staff time, reducing their ability to focus on strategic client services.

3

### Low Online Visibility

A minimal online review presence limited their credibility and client acquisition potential.

## SOLUTIONS

Action Insurance Service leveraged Fuse to automate client communications and improve its online presence. Key solutions included:

- 1 Automated Client Outreach**  
Automated campaigns for client outreach, cross-selling, and enhanced communication.
- 2 True AMS Integration**  
Seamless integration with AMS360 ensured accurate client data and targeted messaging.
- 3 Data-Driven Campaign Insights**  
Fuse's dashboard provided real-time insights into campaign performance, enabling data-driven decisions.

## ACTIONS

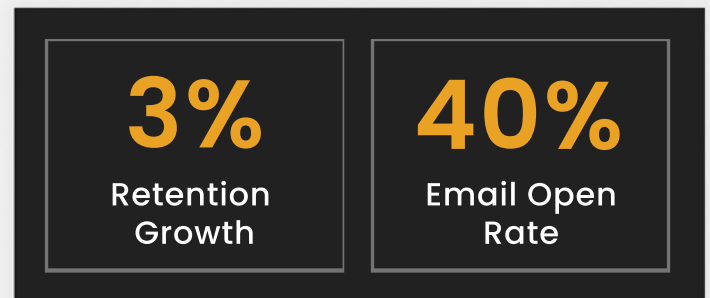
With Agency Revolution's support, Action Insurance Service implemented automated workflows to streamline client communications:

- ✓ Launched targeted campaigns for policy renewals, cross-sells, and client feedback.
- ✓ Utilized Fuse to send timely updates, such as government shutdown alerts, to clients.
- ✓ Developed a lead capture form integrated with carrier websites to streamline requests.

## RESULTS

Following implementation of marketing automation, Action Insurance Service achieved remarkable outcomes:

- ✓ **3% Retention Increase**  
Boosted client retention from 92% to 95%.
- ✓ **Tripled Outreach**  
Increased open rate of 40%.



## SUPPORTING INSIGHTS

The automation strateg improved client retention and strengthened efficiency:

- ✓ **Enhanced Engagement**  
Automated campaigns led to valuable feedback and cross-sell opportunities.
- ✓ **Stronger Connections**  
Communication built trust and allowed staff to focus on high-value activities.

## CONCLUSION

By partnering with Agency Revolution, Action Insurance Service successfully drove client engagement and increased positive reviews through seamless, automated communication.

"Fuse has transformed our client communication, allowing us to engage effectively and boost our online presence."

- Holly Rossell, VP of Operations, Action Insurance Service