

CASE STUDY

Background

Chalmers Insurance Group serves more than 21,000 personal and commercial lines clients across eight locations in Maine and New Hampshire. Marketing Manager Tia Marie-Gagnon single-handedly oversees marketing communications for the whole group, and proudly reports that her agency has taken client service up a few notches since becoming an Agency Revolution customer in 2017.

Tia-Marie Gagnon
Marketing Manager



Challenges

Chalmers Insurance Group took a hard look at their client communications and found they weren't as consistent as they wanted to be. In 2017 they began searching for a better way to keep in touch with their clients and track the results without over-burdening their already busy staff.

As Vertafore AMS360 users, they were impressed to discover that Agency Revolution—a member of Vertafore's Orange Partner Program—integrated directly with their management system to automatically import and manage contacts of prospects and clients. The integration between Fuse™ and AMS360 helped them quickly launch a series of highly effective pre-designed marketing campaigns targeting specific segments with minimal effort from her team.

“Instead of having to create content from scratch, there are pre-formatted emails for you to use. There's even a timeline suggestion, so you can get going pretty quickly. Then you can reflect on what's working and what's not, and optimize the most successful campaigns.”

- Tia-Marie Gagnon



Tia-Marie uses the Fuse™ Welcome Kit campaign to set expectations for new clients and establish the level of service they can expect from Chalmers Insurance Group.



The pre-built campaigns gave Tia-Marie the tools to start using Fuse™ right away. Without the need to create original copy or plan the timeline of touch points, Tia-Marie was able to edit, immediately launch, and quickly optimize campaigns with ease.



Chalmers stays in constant communication with clients, thanks to automatic campaigns that keep them apprised of policy changes, deliver relevant news, direct them to the right resources, issue timely thank you messages upon renewals, and drive new referrals.



Fuse™ has tightened coordination between marketing and account managers at Chalmers. By keeping account managers aware of renewal dates and giving them insights into of the best time to reach out to clients, nothing falls through the cracks anymore.



Because Fuse™ makes it easy to micro-target clients with gaps in their coverage, Tia-Marie has been able to help boost Chalmers' average policy count using cross-selling campaigns.



The Fuse™ dashboard makes it easy for Chalmers to know which clients are engaging with their campaigns and the impact their efforts have on growth.

Results

Chalmers Insurance Group has taken their client experience to the next level by maintaining constant communication with their policyholders. **“Before Fuse™ it was left up to each account manager to prioritize outreach. It’s extremely important to be consistent in how we reach out to our clients, and raising the bar there has been our biggest win. It’s overflowed into everything we do because now we’re in touch, even when it’s just running in the background,”** said Tia-Marie.

Chalmers’ clients have shown their appreciation for that, not only with replies simply thanking them for the information, but also by frequently using Chalmers’ outreach as a starting point to ask for more information about a particular coverage.

Agency Revolution has allowed Chalmers Insurance Group to

- ✓ Automate **up to 15,000** emails/month
- ✓ Increase average customer policy count by **21%**
- ✓ Increase client retention rate by **2%**
- ✓ Achieve an average email open rate **above 40%**
- ✓ **Save hundreds of hours** by automating communications for everything from on-boarding new clients to cross-selling monoline clients