

WalkerHughes Insurance

Company snapshot

WalkerHughes Insurance is based out of Carmel, Indiana with 15 offices across the Hoosier State. The independent agency was named Indiana's 2019 Agency of the Year. Without a doubt this award is attributed to WalkerHughes' innate ability to put people at the heart of insurance – both clients and employees.

"Now we can say that not only are we an independent agency that represents a lot of great companies, but we also provide you 24-hour access to all of your insurance information."

Kevin Wheeler,
Director & Agent,
WalkerHughes Insurance

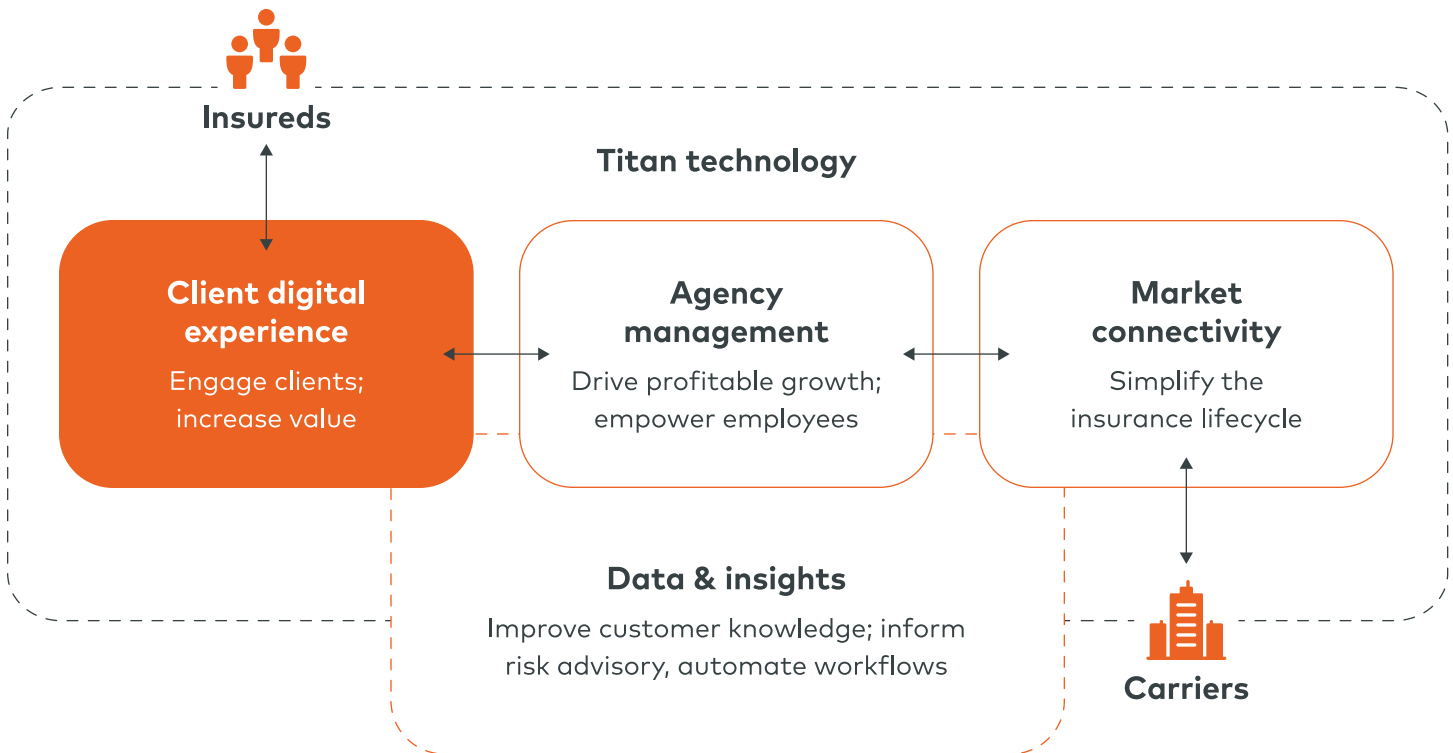
WalkerHughes Insurance

Vertafore solutions

InsurLink

Proven results

- Freed staff time to better focus on revenue-driving activities
- Eliminated barriers to document sharing between client and agency
- Improved brand reputation and the agency-client relationship



WalkerHughes Insurance's focus is improving their **client digital experience**. As such, they've partnered with Vertafore to **drive client engagement** and **increase the value of their client touchpoints**.

Kevin Wheeler admits he was reluctant to follow his father's footsteps and get into the industry in the late '80s. However, upon joining the family business Wheeler quickly realized his passion for discovering efficiencies in running an insurance agency.

Around 2000, Wheeler noticed more and more industries pivoting to offer self-service to their customers. Most notably, banks were introducing ATMs which caught the attention of consumers everywhere.

Wheeler began exploring the idea of applying this seamless customer experience to the independent agency channel.

Service they want, how they want it

"As I looked at what some of the interruptions were in our day-to-day that cost money, it was printing ID cards and doing certificates," Wheeler recalls. "Our job is to be interrupted. But I want to control that interruption. I want to be proactive so that the customer feels they are getting the service they want, how they want it."

Wheeler found and partnered with a company that provided a self-service online portal to end-insureds. However, he quickly uncovered a few key issues.

Most importantly, the portal didn't integrate with the agency management system, making it still very labor-intensive for the agency to upload and share client policy information and documents. Second, Wheeler's customers – especially those who only used the portal a few times a year – often forgot their passwords, requiring Wheeler to go in and reset them himself.

"We opted to part ways with the other vendor and implemented Vertafore's InsurLink and it's been a very good fit for us," Wheeler says. "InsurLink is better integrated with the management system and allows the customer to reset their password if they forgot it. That was huge."

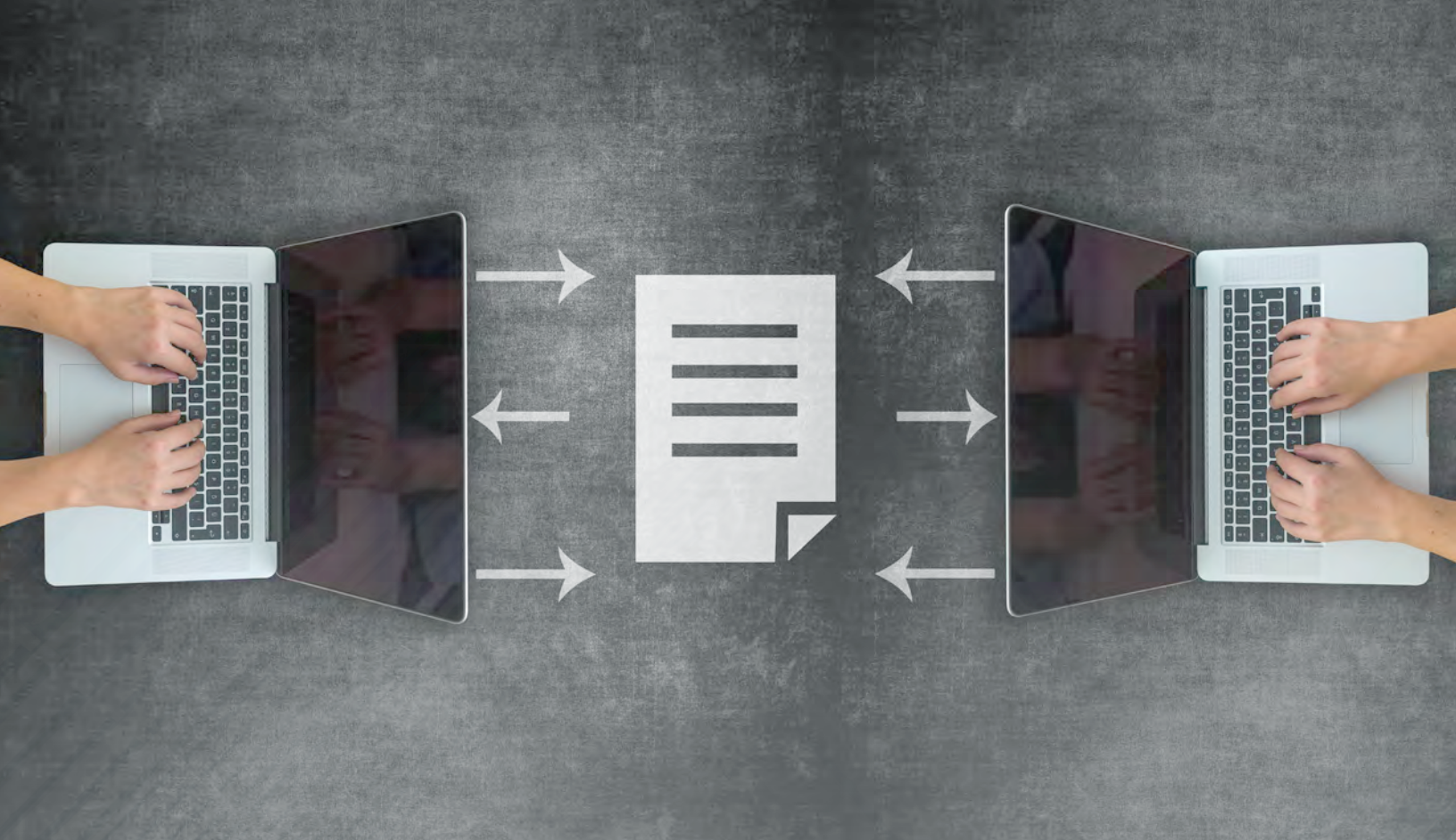
As the family agency grew, more and more customers began using the online portal. Wheeler adds, "We were immediately finding ways to cut out postage and cut out taking time to create a three-ring binder for a customer who's never going to open it."

Over three decades into his insurance career, Wheeler is now Director and Agent at WalkerHughes, where they also use InsurLink to provide an enhanced customer experience.

"The value of InsurLink is my clients get service when and where they want it," Wheeler says. "If they call me or email me to do a certificate, it may be an hour, it may be five before they get that certificate from us. It just depends. But if they're wanting it right then and there, they can use the portal and it's done."

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Simple, secure document sharing

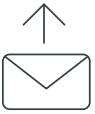
Wheeler explains that his clients' ability to electronically share documents also alleviates a massive pain point. InsurLink allows for secure document sharing that reduces E&O exposure and eliminates the exchange of paper documents.

"I recently had a client who had a really bad claim and they had to share all of these documents, photos, and subpoenas with us," Wheeler says. "They were trying to email them to me, and they kept bouncing because the file sizes were too big."

Wheeler reminded the client that they could simply drop everything into InsurLink. Two minutes later, the customer called back exclaiming, "Oh my gosh, that was so easy!"

Workflow without InsurLink

Insureds had to send documents to WalkerHughes



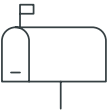
1

Insured attempts to email claim-related documents to the agency



2

Email bounces due to file size



3

Insured must print and mail claim-related documents to the agency



4

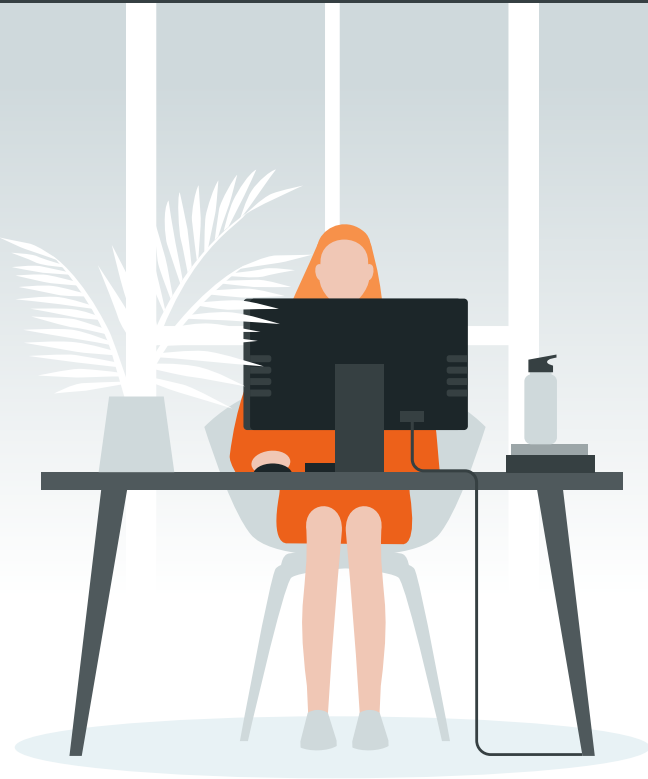
WalkerHughes must scan documents to begin claims process



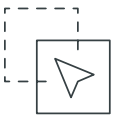
TOTAL TIME: 3 DAYS

Workflow with InsurLink

Insureds can drop documents in InsurLink



"When I'm talking with a customer, I find out what their biggest pain point is," **Wheeler says.** "If they prefer to do things themselves, InsurLink is the perfect fit. It's a real value-add to what we're trying to do."



1

Insured drags and drops claim-related documents into InsurLink



2

WalkerHuges can immediately begin the claims process

TOTAL TIME: 2 MINUTES

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Personalized branding

Wheeler describes the constant struggle of the independent agency: branding and distinguishing the agency from the carriers they work with. "A lot of insurance carriers are promoting their website as the self-service solution for customers," Wheeler explains. "If a client has been using a specific carrier for a few years, they sometimes forget that we are an independent agency, and equate us to their carrier."

Wheeler wants to ensure that the customer is contacting his agency and not the carrier should they need assistance. InsurLink reinforces the WalkerHughes brand and the value of the independent agency with his customers.

The ability to position WalkerHughes as a modern, responsive agency not only strengthens existing client relationships, but has become a key differentiator in the agency's pitch to new customers. "Now we can say that not only are we an independent agency that represents a lot of great companies, but we also provide you 24-hour access to all of your insurance information," Wheeler says. "Not just the policy you wrote with this carrier or that carrier."

With customer expectations shifting toward fast, 24/7 interactions, InsurLink enables WalkerHughes to provide the experience customers demand.

Innovative solutions for the modern agency

Insurance is evolving: The industry is quickly consolidating, as client expectations grow and technology creates new opportunities. The key is staying ahead to remain relevant and profitable. If you're unsure how to move forward in this evolving landscape, Vertafore is here to be your partner and guide you through these changes.

Ready to take the next step?

Contact us to learn more about how Vertafore can help you provide your clients with the digital experience they expect.



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