



## CASE STUDY

## INSURANCE



# GoldMine Opens Doors to New Niche Markets, Relationship-Based Sales at R&R Insurance

### COMPANY PROFILE

R&R Insurance Company has served Wisconsin and the surrounding region since 1976. Locally owned and operated with three offices statewide, R&R is known as The Knowledge Brokers™ because of its broad range of products, services and its ability to provide business solutions, not just insurance. R&R Insurance's range of products includes commercial and personal, auto and property insurance product liability, umbrella, group health benefits, as well as sound advice on estate planning and workers compensation management. With nearly 114 employees and nearly 30 years of proven service, R&R is one of the largest independent insurance agencies in the Midwest.

### BUSINESS NEED

R&R employs a staff of more than 50 licensed agents, each responsible for managing prospects through various stages of the sales cycle and developing targets and their own expertise to foster niche market business. Agents previously stored all this information on index cards, which meant each agent only had access to his or her own contacts. This system didn't allow for database marketing to the entire prospect list, nor did it enable R&R agents to cross-sell their varied products and services with ease.

Additionally, the marketing communications manager, Traci Catalano, supported agents by creating lists of potential prospects in specific

geographic areas or industries for agents to contact, and by managing the company's multi-stage letter and telephone campaigns. She tried various programs, and even managed the centralized contact management and capabilities the company needed. Without an effective tool, she never found enough time to execute all desired campaigns.

*"The beauty of GoldMine is that it stores information in a centralized way. It has helped us improve our sales process and move our prospects to the next level easily. Our agents get to know the prospect even before they start soliciting, and that's a big benefit."*

— Traci Catalano, Marketing Communications Manager, R&R Insurance Services

"Our agency emphasizes relationships and expertise in niche markets," Catalano said. "It was challenging to supply all of our agents with the most up-to-date prospect information."

**Organization**  
R&R Insurance

**Industry**  
Insurance

**Products**  
GoldMine® Corporate Edition

**Web site**  
www.rrins.com

**FrontRange Solutions Partner**  
Ticomix, Inc.

**FrontRange Solutions Technology Partners**  
Redstone SoftBase Company

**Quick Stats**  
Employees: 114  
Users: 40  
Operating environment: MS 2000



#### Business Benefits Realized with GoldMine

- Marketing can quickly get mailings out the door, monitor follow up, and fully support the progress of its agents, all with GoldMine's help.
- The ease and speed of launching direct marketing campaigns means R&R follows through with significantly more campaigns than before.
- R&R can easily import direct marketing lists into GoldMine, allowing the company to hone potential clients and niche markets.
- By closely monitoring the sales cycle and reporting, R&R helps agents identify hot prospects, problem solve, and fine tune campaigns for increased sales.

#### GOLDMINE SOLUTION

After considering several options, R&R selected GoldMine from FrontRange Solutions. "GoldMine was the answer," Catalano said. "We felt that GoldMine was on top of customer needs and listened to what the industry was asking for." Specifically, R&R liked the software's customizability and the option of using a template created especially for insurance agencies.

With their decision made, R&R brought in Ticomix, a FrontRange Solutions Partner, to help with initial implementation. Ticomix added custom tabs to GoldMine to better serve the needs of the company's three main lines of insurance: commercial insurance, group health benefits and personal insurance.

R&R uses list services such as Dunn and Bradstreet and InfoUSA to acquire prospect names for importing into GoldMine. Marketing can then sort the information with filters to create lists by location or business type. With a large, current database available, R&R has valuable information ready to use in its mailing and phone campaigns. The company can then tailor messages for the specific prospects an agent may be working with, and with easy multi-level security options, this information is made available to anyone using the system.

Whereas before, many mailings never made it out the door because the generation and consequent tracking process was simply too time consuming, now Catalano can generate lists and launch mailings in minutes. These additional solicitations and follow-up efforts have led to increased sales for the company. "GoldMine helps our agents stay more focused and holds everyone in the process more accountable," Catalano said.

R&R has a multi-step campaign process that starts with letters and pertinent "seed" articles sent in a regimented, short time period. Then the agent follows up with a series of phone calls within a 48-hour window. If a prospect doesn't pan out by the end of that process, R&R considers that a dead lead and shifts its focus to more promising leads.

Maintaining detailed contact information is integral to success in the insurance business. In GoldMine, R&R collects and tracks relevant information on policy expiration dates, carriers and current agents. The system prompts agents before a prospect's policies expires, and helps them anticipate opportunities to introduce their services to new prospects. Agents know if a prospect already has one line of insurance and can cross-sell additional types of coverage.

"The beauty of GoldMine is that it stores the information that we want, where we want it in a centralized way," Catalano said. "It has helped us improve our sales process and move our prospects to the next level easily. Our agents get to know the prospect even before they start their introduction process, and that's a big benefit."

With access to GoldMine from home via a terminal server connection, agents have greater flexibility and control over their contacts. The agents at R&R have come to rely on GoldMine as their source for the most up-to-date information available anytime they need it.

"GoldMine has helped us to dissect and improve our sales process. We can modularize what we do, which helps us in training new agents," Catalano said. Through the use of GoldMine, R&R has a structured sales process



that can be easily followed and modified to achieve better results.

GoldMine also helps management keep up with sales activities. By tracking weekly agent activity, including the number of new prospect entries, follow-ups and effective targeting, R&R can manage the effectiveness of its sales force and keep track of production.

From the start, R&R has turned to Ticomix to help them take full advantage of the essential GoldMine functionality. A Ticomix consultant comes on-site weekly for maintenance and customization programming. Currently, Ticomix is adding a record typing entry screen that enables agents to quickly input the pertinent data. That way, all the information Catalano needs to create lists will already be in GoldMine. "We wouldn't have been able to do this without Ticomix," she said.

R&R takes pride in its quality service and strong relationships. With GoldMine, all the details of those relationships are easy to find and ready to be put to work for the agents and their contacts. With GoldMine taking care of the details, R&R can focus on new relationships and growth.

#### **SUMMARY**

R&R not only lives up to its reputation as "The Knowledge Brokers" in its insurance operations, but in its use of knowledge and information to build relationships and continuously improve processes. Centralized access to information has led to substantial time savings, an updated and more personalized sales process, and greater success with prospects. As Catalano notes, "more touches mean more opportunities, and with more opportunities, come more sales."