

TWFG INSURANCE SERVICES CASE STUDY

How InsuredMine Helped TWFG Insurance Services Automate their Renewal Process & Save 3 Hours a Day

What will you achieve with the 3 hours you saved per day?

How can using a CRM help in renewal and nurturing customers?

How can using a CRM increase your profitability?



Goals

When you are insurance agency owner, time is everything and everything you can do to automate and be more efficient, means the world to you as a business owner. Damon Cook was looking for a solution that will help him scale the customer renewal process effectively.



Challenges

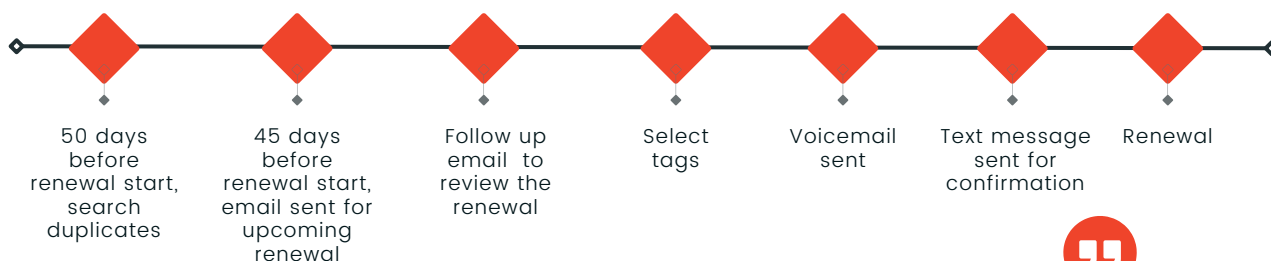
Damon Cook had difficulty managing renewal data. He has some accounts that have been with him 10 years and some of which are coming up on their first year of renewal. It was challenging to know exactly where each renewal was in the book of business and access the history at scale at any given time.



Solutions

With InsuredMine - Damon is able to set and automate the renewal process, which includes lost deals and inactive customers. This way, the focus can be shifted to forming meaningful relationships, cadences and touchpoints during the customer journey.

RENEWAL PROCESS WORKFLOW



BENEFITS OF USING INSURED MINE

Increased productivity through automation

With InsuredMine CRM, Damon is able to automate the same tasks, emails, text and scheduling for each renewal. He is able to track each account and what has occurred all within the platform. This helps him automate the entire renewal journey.

Sales and marketing

With an optimized and scaled renewal process, you will be able to save more time and take a more customer-centric approach. This way, you can focus on other sales and marketing automation to deliver and measure value delivered throughout the customer journey.



"InsuredMine saves me 3 hours a day. I am now spending 50/50 of my time servicing/new sales vs. 85/15 on servicing/new sales. The 3 hours I saved, allows me to find new business."

Damon Cook
Branch Owner
TWFG Insurance Services

About TWFG Insurance Group

Damon Cook is a one-man band at his agency, a part of TWFG Insurance Services. Damon is committed to providing clients with the highest quality of insurance plans. Damon helps individuals find a peace of mind by safeguarding their personal and business assets with tailored insurance programs.