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InsuredMine has made all the difference in the world and allows a seamless experience. To have a sales pipeline that integrates with HawkSoft on a quoting/renewal level and sync back to the system is a huge thing for our organization. That consistent transfer of information saves us time and works flawlessly.

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Peter Hutchins
President

Commonwealth Insurance Group

Agency Snapshot

Commonwealth Insurance Group is a locally-owned independent agency in Louisville Kentucky. They opened their doors in 2008 to deliver quality insurance services that is personalized. Their specialties include home insurance, auto insurance, business insurance, life insurance, and commercial insurance.

Commonwealth Insurance Group

Proven results:

- Segmenting customers to create better engagement opportunities
- Build customizable communications to clients and prospects
- Organized system workflows for increasing efficiency and saving time

InsuredMine helps standardize agency's processes to boost productivity

While many agencies think they may have a process in place, InsuredMine's training manager helps define and bring to life the process flow in InsuredMine.

CEO, Peter Hutchins describes "InsuredMine has solved the problem that I have had for many, many years. It's been really helpful to have a game plan to walk through, because we know what phase I looked like and the training and onboarding has been super helpful to help get us there. I also enjoy the weekly customer calls InsuredMine puts on as it reiterates what I'm doing right or wrong in the platform."

Automated workflows

Commonwealth Insurance Group struggled to find the time to personally reach out to new customers and develop relationships. The InsuredMine CRM software automated communications for their customers. The automated communications are used when a customer signs a new policy, remind customers about upcoming renewals, policies they should be considering, and other marketing efforts.

Personalized customer engagement through customer segmentation

Through the CRM, Commonwealth Insurance Group has the ability to segment customer data. This has allowed them to create better engagement opportunities and grow their book of business.

With a segmented list in InsuredMine, you can:

- Target a specific audience
- Add filters to selective list
- Use these lists for campaigns

"Everyone doesn't get generic correspondence. It's more specific to what we know about the customer. Really the big thing that InsuredMine does is, allow us to segment data to see it in ways we haven't seen it before. You can't be all human and all automated, but this allows us to do it the most efficiently in between."

Peter Hutchins
President of Commonwealth Insurance Group