

“ My policies are downloading perfectly with about 99.9% accuracy. I can see how this is incredibly helpful in my renewal process. ”



Greg Safford
President



YOU'RE UNIQUE
YOUR INSURANCE
SHOULD BE TOO™

Safford Insurance

Agency Snapshot

Safford Insurance, located in Franklin, Massachusetts takes pride in bringing unique insurance solution that is as unique as you are.

This thriving, full-service agency provides everything from personal insurance, commercial insurance, life executive, pet insurance, travel insurance, as well as wedding insurance.

Safford Insurance

Proven results:

- Using sales pipeline to manage outreach
- Customized to fit agency needs
- Improved renewal management
- Improved retention rate
- Integrations to automate the processes

Road to InsuredMine

Briefly before InsuredMine, Safford Insurance was using another CRM vendor that did not have the advanced features they needed. In addition, it had minimal integrations with its platform and tech stack. "The previous vendor we were using was not customized to our agency. Moreover, it was expensive per person."

Safford Insurance wanted an all-in-one tool for sales and marketing.

Streamlining With CRM

When asked what challenges Safford Insurance wanted to overcome using InsuredMine, Greg quickly pointed out integrations. "You did a fantastic job with this integration that is bang on," said Greg.

In addition, Greg was looking for a sales process flow, from leads to deals to quotes which is customer-centric.



"The agency management system we are using was not built for managing a pipeline, and there was no card system. I was dropping opportunities. I knew I was dropping the ball after I sent a quote to the client and wasn't doing a great job following through after the initial contact of the lead."

Customized Workflows

The Safford Insurance Group also used InsuredMine to understand their prospect's journey which provides insights into tasks and activities. This helps their agency communicate with their customers the right way. "Flexibility is fantastic with InsuredMine. We built our course material around the problems we were trying to solve. In addition, our client retention rate is 91-92%." InsuredMine helped Safford Insurance centralize all client data into one platform, creating a single source of truth for agents to access the most vital information when it needed it.