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Indiana Farm Bureau Insurance



 **Hitachi Solutions**



CUSTOMER PROFILE

Organized in 1934 by Indiana Farm Bureau Insurance, Inc., the company has grown to include insurance products for auto, life, home, business, and farm. Business and other financial services and products are also available.

INDUSTRY

Insurance

LOCATION

United States

Dynamics CRM Customer Story

Leading Indiana Insurance Provider Strengthens Agent Engagement, Marketing Outreach with Microsoft Dynamics CRM

Indiana Farm Bureau Insurance has protected fellow Hoosiers for nearly 80 years. Organized in 1934 by Indiana Farm Bureau Insurance, Inc., the company has grown to include insurance products for auto, life, home, business, and farm. Business and other financial services and products are also available.

With a home office in downtown Indianapolis and local offices in all 92 counties, Indiana Farm Bureau Insurance serves Hoosiers with more than 430 agents and nearly 1,200 employees, who live and work throughout the state. The company is a leader in auto and homeowners insurance and the largest writer of farm insurance in the Hoosier state.

The company's mission is to support Indiana Farm Bureau Insurance and its members by being the premier provider of insurance and financial products and services in the communities it serves. The vision is to provide distinctive products, service and solutions that enhance the financial health of its clients and company.

CHALLENGE

The rise of consumer technology has created a quickly changing, digitally focused business landscape where the customer is firmly in the driver's seat. As customers can easily search, contact, and switch over to new insurance companies with a few clicks on a smartphone, insurance companies have needed to fundamentally change the way they engage with customers in order to succeed in a fiercely competitive industry.

"We needed to change the way that we get new business in the door," said Mindy Cron, Business Project Manager, Indiana Farm Bureau Insurance. "Before, people used to come to us – we didn't have to do a lot of acquisition type work. Our phones were ringing, and people were walking through the door. But that's not the case anymore, specifically in the urban areas where the competition is much greater. So we needed to find a way to get our name out in front of people, and be able to manage our sales funnel."





“Our end users are working in Microsoft applications every day, so we knew that Microsoft Dynamics CRM’s familiar interface, as well as its ease of use, would quickly become an important productivity tool for our agents. Dynamics CRM’s flexible architecture was also a key factor when comparing CRM systems.”

Mindy Cron, Business Project Manager, Indiana Farm Bureau Insurance

Indiana Farm Bureau Insurance operates through a large network of agents located throughout the state. Although these agents are captive agents, they exclusively sell Indiana Farm Bureau Insurance products to the public. With no customer relationship management system in place, agents had to rely on their own individual tools and techniques for keeping track of prospective and existing customers. But the inefficient processes and lack of visibility from these disparate systems hindered agent productivity.

“They had various systems, from pen and paper, to Excel spreadsheets, to other applications, and all without any kind of marketing or nurture program capability,” said Cron. “There was really no best practice from a corporate standpoint. The CRM project was driven by our agents and managers; they brought it to us.

With Dynamics CRM, agents don’t have to rely on these outdated, manual processes. Agent Ashely Utley praises Dynamics CRM for having “way more to offer and helping with organizing and serving clients better.”

“I had a lot of spreadsheets for different things,” Utley said. “I have a life pipeline, referral pipeline, and others. It was hard to keep up on those because obviously you can’t set reminders; you just have to keep looking at it and try to stay current with tasks.”

SOLUTION

As a Microsoft shop, Indiana Farm Bureau Insurance selected Microsoft Dynamics CRM for its user-friendly, intuitive interface, and its ability to integrate with administrative systems and other Microsoft applications, such as Outlook.

“Before CRM, I used a combination of paper files for renewal quotes, and had been adding new quote information to Outlook with a recurring date to quote,” said agent Scott McDonald. “Today, I use CRM to capture all client and prospect information. The CRM system is more organized, with me being able to view and input information for the sales process.”





“CRM is much more time friendly. With its ease of use and ability to help me do tasks in half the time as my old system, CRM allows me even more time for prospects, service work, etc.”

Bryan Clark, Agent, Indiana Farm Bureau Insurance

One of the additional benefits of Dynamics CRM in comparison to other CRM systems was the power of choice that it offered. With Dynamics CRM, Indiana Farm Bureau Insurance could go on the cloud or on-premise; other CRM systems did not provide both options.

Indiana Farm Bureau Insurance leveraged implementation partner Hitachi Solutions’ in-depth Dynamics CRM technical knowledge and expertise. “Hitachi Solutions helped us understand all of the functionality that Dynamics CRM has available for us, and how to apply that functionality to our business,” said Cron.

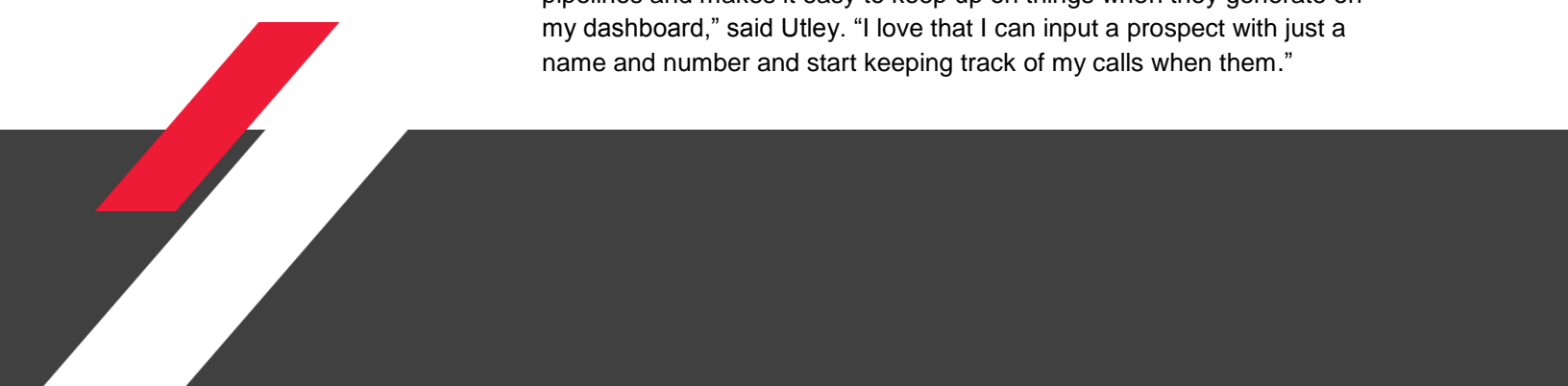
Microsoft Dynamics CRM provides Indiana Farm Bureau Insurance agents a comprehensive, standardized database that stores customer insurance histories in one place. By looking up a customer, agents have total insight into all past interactions the customer has had with the company, and what customer needs the agent can best serve.

In addition to customer visibility, agents experience quicker data entry with the ability to perform bulk data imports. Instead of manually entering in lead information one by one, as was previously the case for many agents, agents can now simply import a spreadsheet directly into Dynamics CRM through a custom CRM template.

Microsoft Dynamics CRM’s opportunity views and step-by-step sales opportunity process ribbon also enable agents to effectively manage every stage of the sales process. Agents are able to see the types of business that are in their funnel, and the premium amounts associated with these opportunities.

“Dynamics CRM makes the sales funnel visible to our agents, which allows them insight into where they are in the opportunity’s sales cycle,” said Cron. “With opportunities that are x-dated, agents can see what is currently in their funnel, and what is coming up soon.”

“I love the x-dating opportunity function that replaced my spreadsheets of pipelines and makes it easy to keep up on things when they generate on my dashboard,” said Utley. “I love that I can input a prospect with just a name and number and start keeping track of my calls when them.”





Besides greater efficiency with sales processes, Microsoft Dynamics CRM's seamless integration with ClickDimensions has given Indiana Farm Bureau Insurance a crucial tool for marketing outreach. Indiana Farm Bureau Insurance agents can put contacts into marketing lists with specific email nurture programs, from aggressive to non-aggressive. People can be moved in and out of nurture programs, either manually or systematically.

Marketing emails sent from ClickDimensions are easily customized to make the agent the sender, with the agent's contact information and picture within the email body. Links can also be included, such as to an online quote or a contact page, and can be tailored according to the line of business that the lead belongs to. Special events and occasions can also merit an email touch.

"We like the fact that we can communicate to leads even on their birthdays," said Cron. "We've had success with getting responses from an email sent on a birthday, resulting in sales."

BENEFITS

Enhanced Quality of Sales Data

Prior to Dynamics CRM, agents' disjointed systems created time-consuming and inconsistent data tracking. Microsoft Dynamics CRM removes the guesswork, allowing agents to make the best use of their time by easily searching, identifying, and working on the prospects that present the highest value.

"I use CRM daily to keep track of my prospects," said Clark. "CRM has allowed me to 'stay in front of the people' much easier and quicker."

Marketing Tracking

With Dynamics CRM and ClickDimensions, Indiana Farm Bureau Insurance is able to analyze the performance of marketing emails and nurture campaigns.





WHY HITACHI SOLUTIONS?

Hitachi Solutions is one of the largest, most qualified and highly experienced Microsoft Dynamics consulting firms across the globe, capable of handling complex tier-one displacement projects. Our company's caliber of expertise and commitment to customers is evidenced through our consistent recognition from both Microsoft and industry analysts. Contact a Hitachi Solutions expert to discuss how our Microsoft Dynamics Solutions can help improve your productivity.

Call Us: +1 866.816.4332

Email Us:

CRMinfo@hitachi-solutions.com

For instance, after an email has gone out, the company can see how many contacts have opened the email, and how many clicked on links.

With agents previously sending out their own emails individually – and manually – to prospects and customers, they had no reporting functionality to leverage. But now, agents can better measure marketing activities and their subsequent results.

Said Scott McDonald: “The most important benefit [of CRM] is to place day-to-day operations at one location. The most successful benefit is the nurture programs, [and] not being required to prepare marketing letters.”

Data Storage and Protection

With agents using their own unique systems for storing and tracking sales data, the data's existence depended wholly on the agent. So if an agent left Indiana Farm Bureau Insurance, the data left with them.

“From a corporate perspective, we had no access to that information, so we couldn't continue to try and market to those leads,” said Cron. With Dynamics CRM now serving as the agents' repository for entering all information pertaining to customers and leads, Indiana Farm Bureau Insurance corporate can view sales data and activities at any time.

