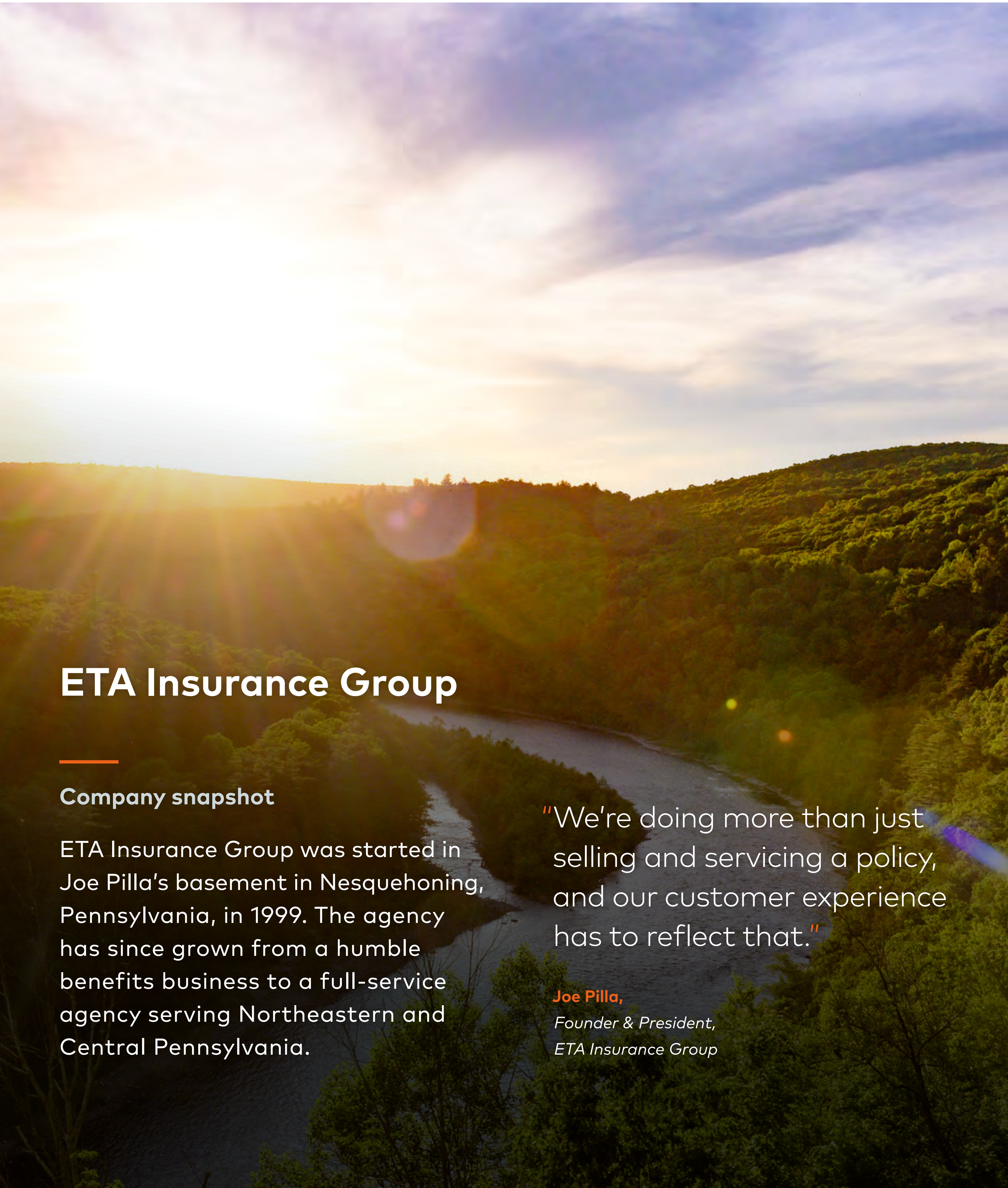
Vertafore

SUCCESS STORY



ETA Insurance Group

Company snapshot

ETA Insurance Group was started in Joe Pilla's basement in Nesquehoning, Pennsylvania, in 1999. The agency has since grown from a humble benefits business to a full-service agency serving Northeastern and Central Pennsylvania.

"We're doing more than just selling and servicing a policy, and our customer experience has to reflect that."

Joe Pilla,
Founder & President,
ETA Insurance Group

MODERNIZING THE AGENCY

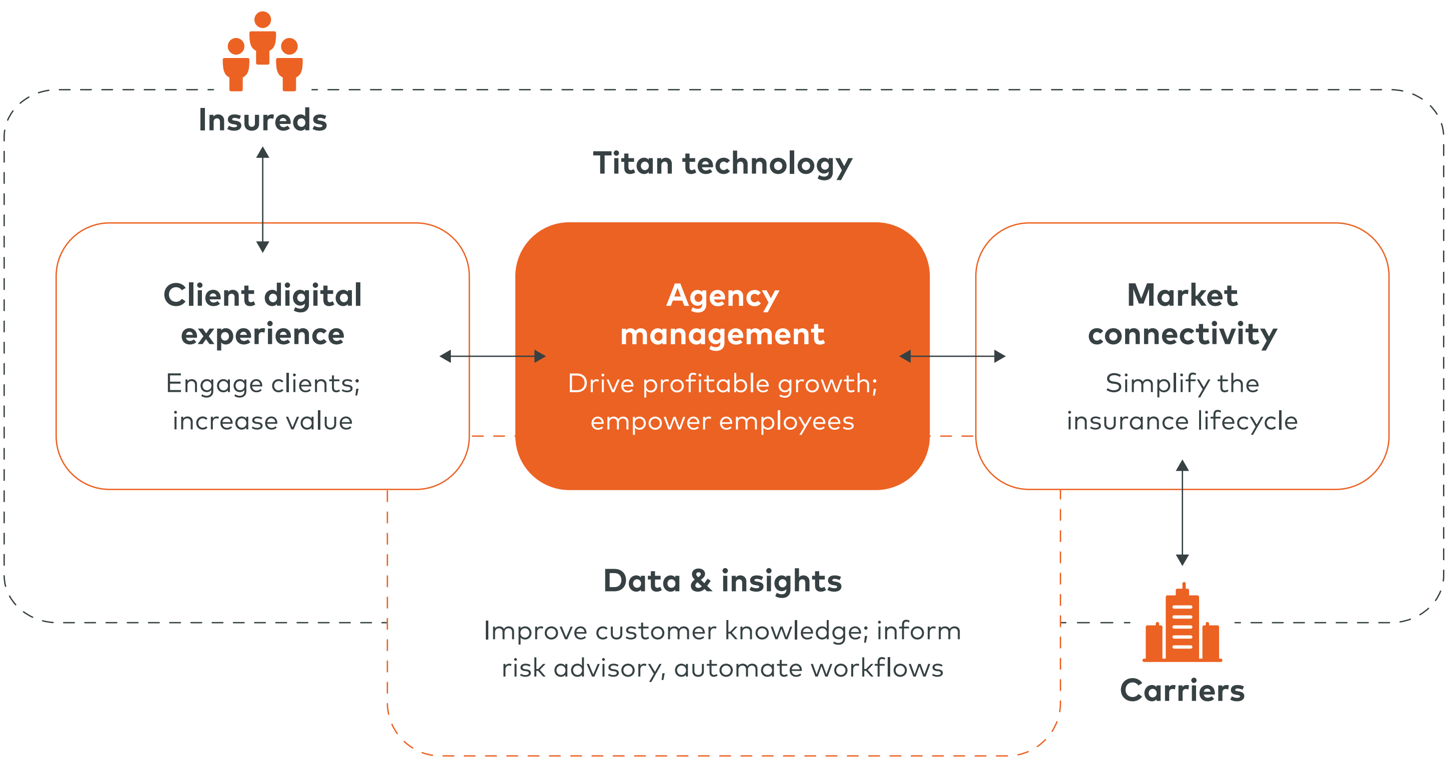
ETA Insurance Group

Vertafore solutions

QQCatalyst

Proven results

- Implemented a completely paperless business model to improve efficiency
- Adopted modern technology to appeal to client expectations
- Reduced time spent responding to simple inquiries by more than 80%



ETA Insurance Group is focused on improving their **agency management capabilities**. As such, they've partnered with Vertafore to **empower employees** and **drive productivity**.

ETA had a modest beginning, but they quickly transformed into a thriving business by providing a modern, enjoyable experience for their customers. **Pilla says,** "We're competing with companies like GEICO and Progressive. There's a lot of interference from ads from these big box direct writers. We're doing more than just selling and servicing a policy, and our customer experience has to reflect that."

QQCatalyst helps ETA provide this first-rate customer experience by improving internal efficiencies and catering to customer expectations. From marketing to policy renewal, QQCatalyst is there to automate ETA's processes and modernize the agency-client relationship.

Automated marketing and onboarding

The modern customer experience begins with a smooth onboarding process. Most agencies today struggle to find the time to personally reach out to new customers and develop relationships. QQCatalyst's Agency Intelligence module allows ETA to set predetermined, automated communications for their new customers, triggered by a customer signing a new policy.

> "When we get a new customer, we have an introduction letter, thank you card, and process walkthrough all automatically go out."
>
> **Joe Pilla,**
> *Founder & President,*
> *ETA Insurance Group*

These automated communications known as Smartflows are simple to set up, and Pilla can dictate what message should go out and when.

Smartflows save the ETA team heaps of time while starting the client relationship off on the right foot. These automated communications can also be used to remind customers about upcoming renewals, policies they should be considering, and other marketing efforts.

Servicing made simple

Once a customer is effectively onboarded, the focus shifts to keeping them happy. Perhaps the most critical piece of the modern customer experience is fast, reliable service. QQCatalyst empowers ETA to quickly service customer accounts.

Before implementing the management system, employees had to physically retrieve paper documents to service an account – resulting in a frustrating customer experience.

Workflow without QQCatalyst

ETA kept physical files on each customer

1

A customer called or emailed the agency requesting a copy of their policy

2

The CSR went downstairs to where the filing cabinets were stored

3

The CSR sorted through the files to find the right policy before scanning it

4

The file was then sent to the producer who shared the policy with the customer

TOTAL TIME: 30 MINUTES

Workflow with QQCatalyst

ETA digitally stores files with QQCatalyst

1

A customer calls or emails the agency requesting a copy of their policy

2

The CSR has immediate access to the customer's policy and quickly emails it to the customer in just a few clicks

TOTAL TIME: 5 MINUTES

QQCatalyst enabled ETA to go completely paperless. Executive Assistant and Account Manager Renee Slakoper says, "We went from receiving an email, going to the basement, scanning in documents... to pulling a client's information up immediately. That's a lot of time saved."

She goes on to highlight the newfound ability to remove silos and improve cross-department functionality with the paperless approach. "Now we can service an agent's clients while they're away and we have the information right at our fingertips," she says.

Meeting clients' communication needs

With shifting customer expectations come changing technologies to support them. Customers are increasingly using texting to interact with the companies they do business with.

"Most people would rather get a text or an email instead of a phone call," Pilla says. "I have a 70-year old customer who says he prefers to communicate through text so you can't say it's just the younger generations. It's everybody."

QQCatalyst has built-in texting features that allow customers to text the agency directly instead of a producer's personal phone number. QQCatalyst then automatically logs customer texts on the customer's file to reduce E&O exposure. Pilla recalls spending a weekend with his family by one of Nesquehoning's lakes. His neighbor approached, needing a certificate of insurance to take his boat out on the water. "I pulled up my phone and texted him a copy," Pilla says. And just like that, his neighbor was on his way. "With mobile capabilities, we can answer any question or send documents from anywhere," he adds.

Innovative solutions for the modern agency

Insurance is evolving: The industry is quickly consolidating, client expectations are growing, and technology is creating new opportunities. The key is staying ahead to remain relevant and profitable. If you're unsure how to move forward in this evolving landscape, Vertafore is here to be your partner and guide you through these changes.

Ready to take the next step?

Contact us to learn more about how Vertafore can help you empower your employees and drive productivity.

Learn more

Vertafore

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