

CASE STUDY

Background

With five locations across the Pacific Northwest, Washington-based Columbia Insurance & Wealth Management serves the entire United States with more than 15,000 commercial and personal lines policies in force. To better serve its large client base, Columbia determined in 2017 that it needed to improve its client communications, overall marketing, and make significant improvements to the agency website. A board member familiar with Agency Revolution's tenure in the insurance industry recommended that the leadership team at Columbia consider our solutions.

Challenges

Columbia Insurance & Wealth Management knew that it needed to overhaul marketing, and the team recognized that it would be no small feat. Among the many projects needing attention, they decided to focus on improving back-end marketing operations and upgrading the website. That project would include updating the site's design, adding new content and resources, and making it more user-friendly for site visitors.

With a number of mergers and acquisitions completed, the Columbia team wanted to simplify the onboarding process for newly acquired clients. They loved how [Fuse™](#) integrated with their management system, Applied Epic, and made it easy to segment communications based on account size, complexity of accounts, policy type, or geography. They also appreciated how intuitively the platform could be used by their marketing team and account managers.



“Our new website is so much more user-friendly than our old one, and it provides a wealth of knowledge to our clients. We’re reaching a much broader audience now. I think our traffic has quadrupled.”



Whitney Norcup, COO
Columbia Insurance & Wealth Management

How Agency Revolution Works for Columbia Insurance & Wealth Management

The Columbia Insurance & Wealth Management team uses [Fuse™](#) to automate staying in touch with clients. They attract new leads with their [Attract™](#) website, and stay focused on their marketing strategy with the help of an [Elevate™](#) marketing specialist.



Modern, professionally-designed website powered by Agency Revolution **establishes the company's digital presence**



Website featuring fresh content and user-friendly resources keeps the site "sticky," **attracts leads and provides valuable information** on relevant topics



Welcome, renewal, account rounding, referral, reputation management and other **automated campaigns send right marketing message at the right time**



Pre-written, customizable content lets Columbia **communicate and engage consistently** with clients, without over-burdening the staff



Integration with Applied Epic has enabled **faster and more seamless onboarding of clients** from newly acquired firms



Quickly launched new custom campaigns with great success with support from knowledgeable Agency Revolution marketing specialist



Deployed the Lost Customer campaign, **gaining valuable customer information and actionable insights** that in some cases helped to reinstate lost accounts

Results

Columbia Insurance & Wealth Management has been able to improve the client experience for new, acquired, and existing clients. Previously, clients had to initiate conversations with the agency when they needed support or information. Today, Columbia regularly touches every contact in its management system with appropriate messaging for their needs, depending on their engagement level and account specifics.

Besides improving the client experience with Agency Revolution's automated communications, Columbia now has a better grasp on customer sentiment, thanks to [Fuse's](#) Lost Customer and Reputation Management campaigns. The leadership team reports getting immediate value from the [Fuse™](#) dashboard, which presents overall agency performance and business health at a glance.

Whitney Norcup says **"Whether it's email open rate, client engagement, business insights, NPS® scores, commercial versus personal lines, or new business stats, [Fuse™](#) provides me quick access to so many business insights. It makes me excited to focus on what I need to do and it keeps my marketing top of mind."**

Agency Revolution has allowed Columbia Insurance to:

- ✓ Increase client retention rates ~2% YoY
- ✓ Significantly increase communications with clients while saving 3-5 hours of work per week per account manager
- ✓ Quadruple traffic to their website over one year
- ✓ Boost client satisfaction and positive reviews