

CASE STUDY

Background

Jamie Trovato ran a captive insurance agency for 10 years, but over time he wanted more freedom than the captive world allowed. In 2011, he started his own independent insurance agency. Today, Trovato Associates is a single location agency with more than 2,800 personal and commercial lines clients. Jamie loved how powerful the integration between Agency Revolution's Fuse™ and HawkSoft Agency Management System is – and has been implementing some of the most effective and creative automation campaigns we've seen since Trovato Associates became a customer in January 2018.

Challenges

When Jamie Trovato stumbled upon Agency Revolution, he didn't realize he had a problem that needed to be solved. "It was this whole new world that was uncovered when I was introduced to Agency Revolution. While learning Fuse™, I started to identify critical agency pain points that could be alleviated with automation, and I was determined to figure out how to help my agents be proactive in resolving pre-renewal, post-renewal, client follow up, cross-selling challenges," says Jamie.

When Jamie saw how Fuse™ and HawkSoft integrate to improve client communications, and reduce menial tasks for his staff, it opened his eyes to a new way of running his agency. Jamie became the Fuse™ expert, and has since completely transformed how his agency handles claims, prospecting, or even client payments.

"Agency Revolution changes your whole mindset about how to run your agency. With automation, I can make things way more efficient on so many levels. From how we take payments to how we follow up with clients. Using Fuse™ has shown me a different way to do things."



Jamie Trovato
Principal, Trovato Associates



When someone makes a claim, the type of claim is selected in HawkSoft, which triggers Fuse™ to send a series of text messages and emails to both the customer filing a claim as well as the relevant service providers, preparing everyone on what to expect and how to proceed. This saves countless hours.



As Trovato Associates team members moved on to new opportunities, Jamie decided not to backfill. Instead, he uses Fuse to automate lead acquisition and nurturing, eliminating the need for staff and saving \$100,000 in the process.



Because Fuse™ automates mundane tasks such as taking payments, processing claims, and nurturing prospects, the staff can focus their attention on clients and developing their own skills to improve the agency in a meaningful capacity.



By staying in constant contact with his clients by automating communications during important stages of their lifecycles, Jamie has generated a steady stream of referrals to his agency through automated messaging.



Whenever a customer's policy is past due, Fuse™ automatically sends text messages and emails informing the client of the status of their payment, driving them to a mobile-friendly webpage that lists all the options to pay their bills from their phone or desktop in just a few clicks.

Results

Jamie Trovato has completely transformed how he operates his business through automation. His staff is no longer bogged down with tasks related to claims, cancellations, onboarding new clients, or following up with new leads – freeing them up to work on the agency in more meaningful ways. Because of the way Jamie uses Fuse™ to automatically prospect new contacts in his system, he completely changed the structure of his team, removing the need for producers and significantly reducing his staffing and overhead costs while building deeper relationships with clients that buy more policies and refer more new business than ever before.

Meanwhile, his customers are as happy as ever. **“If you watch the testimonials on my website, every single thing that those customers said about why they like working with Trovato Associates is directly related to my automation. If you’re in the trenches doing everything yourself, there’s no way you’re going to be able to communicate with everyone. By using automation, you give everyone a personal touch,”** Jamie said.

Agency Revolution has allowed Trovato Associates to:

- ✓ Transformed agency staffing structure (no more sales people) by automating lead acquisition and nurturing
- ✓ On glass claims alone, automated outreach to clients and service providers saves his team more than 4 hours a month
- ✓ Saved **\$100,000** in annual staff costs
- ✓ Achieved an average email open rate above **40%**