

ERIE MUTUAL INSURANCE DRASTICALLY REDUCES CUSTOMER ATTRITION WITH CLARITYSOFT CRM

HIGHLIGHTS

- *Erie Mutual implemented Claritysoft CRM as part of a larger program to improve the customer experience and enable high-touch relationships.*
- *In 2 years, Erie Mutual improved customer satisfaction and reduced customer attrition by 22%.*
- *Claritysoft CRM helped the organization gain efficiencies in sales and service processes and make smarter marketing decisions.*

BACKGROUND

The Erie Mutual Fire Insurance Company underwrites, sells and services insurance policies in the Niagara region and Haldimand County, Ontario, Canada. Established in 1871, the company offers farm, auto and property insurance in addition to small commercial packages.

A customer-centric organization, the company owns the entire policyholder experience from initial sales via captive agents to underwriting to claims.

Erie Mutual has served Ontario for over 140 years and is an integral part of their community with support for local hospital foundations, 4-H and Crime Stoppers sponsorships and financial support for clubs, groups and organizations.

CHALLENGE

The insurance industry is known for large players and cut-rate providers. “We’re not the cheapest insurance and we don’t want to be. Rather, we want to provide the best possible customer experience. That’s our competitive advantage,” says Mary Bacher, Chief Operating Officer.

“We’ve always been customer-focused and seven years ago we ramped up that focus. Because we own the end-to-end customer experience, we have an opportunity to deliver an outstanding experience in ways that other agencies or brokerages can’t,” continues Mary Bacher.

Another industry challenge is shifting policyholder demographics and customer demands. “In the past, business was conducted at the kitchen table. Now, some customers want to talk on the phone while others prefer text messages and email,” observes Mary Bacher. Erie Mutual has committed to communicating with each policyholder in his or her preferred method.

Finally, Erie Mutual wants to grow. “While some companies in our industry have grown through mergers and acquisitions, we’re committed to growing organically – that’s our strategic preference,” states Mary Bacher.

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Mary Bacher
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SOLUTION

Erie Mutual implemented Claritysoft Customer Relationship Management (CRM) as part of a larger program to improve the customer experience. “Insurance organizations have to be proactive because you don’t need to talk to your agent every day,” says Mary Bacher.

Previously, some of the organization’s customers went multiple years without hearing from their agent. Using Claritysoft CRM, Erie Mutual is able to achieve their goal of contacting every customer at least once per year – and high-touch relationships aren’t limited to just one agent. Mary Bacher states, “In the past customers had to wait to talk to their specific agent. Because we’ve centralized customer information, any agent can work with customers whenever they need us.”

With a diverse sales team, Erie Mutual needed a CRM that a wide-range of users could understand and readily adopt. “We chose Claritysoft because of its user friendliness and its ability to integrate with our email system,” says Mary Bacher.

While intuitiveness and integration helped overcome much resistance, there were still hurdles to user adoption. The team addressed this issue through communication and training; however, this wasn’t enough. “We continually reinforce customer relationship management through activity and sales reports and even contests,” reveals Mary Bacher.

Erie Mutual has expanded Claritysoft CRM to reach other parts of the enterprise. “As we expand and customize the CRM system, we’re seeing more benefits from Claritysoft,” says Mary Bacher. Policy changes and property inspections are all tracked within Claritysoft – and those records are available to agents to help service customers better.

RESULTS

“In 2 years, we reduced attrition by **22%** through our focus on the customer experience and Claritysoft CRM,” states Mary Bacher.

By identifying and serving customer needs better, Erie Mutual has been able to improve the customer experience, creating more satisfied customers. Improved satisfaction has led to more customers staying longer – an outstanding achievement in an industry where customer demographics and demands are changing.

Claritysoft has helped the organization gain efficiencies in sales and service processes. Erie Mutual can respond faster to customer inquiries, process policy changes quicker and even expedite new policies.

Finally, the executive team is making smarter marketing decisions because they know their best lead sources and which marketing campaigns are working – and which aren’t.

Mary Bacher quotes Ken Blanchard, “‘Customer service is an attitude, not a department.’ We see Claritysoft as a tool to help us achieve our organizational goal of creating amazing customer experiences and keeping our customers for a very long time.”

LEARN MORE

To learn more about Claritysoft’s Customer Relationship Management solutions, contact us at 888-838-7487.

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