



Optimize salesforce.com For Visibility and Insight



BACKGROUND

Established in 1891, Thoits Insurance is a regional California insurance brokerage, employee benefits and risk management consulting firm. Thoits serves the needs of companies in a wide range of industries in the Bay Area's peninsula and Silicon Valley through personalized service and competitive solutions. By determining risks in all areas of business Thoits experts can protect its clients' business and assets against these risks. Thoits is one of the largest 100% employee-owned insurance brokerage firms in the U.S. Its areas of expertise include: property and liability programs, workers compensation, employee benefits consulting, executive benefit and international consulting, retirement plan services, international risk, enterprise risk management services, risk control and claims consulting, personal insurance programs and more.

CHALLENGES

Thoits Insurance has a business goal to increase the efficiency, scalability and visibility of its growing sales organization. Thoits wanted to increase the adoption of salesforce.com and increase the amount and accuracy of the data collected from sales reps but without reducing their overall efficiency in helping customers and closing business. Gaining visibility into sales performance and pipeline was critical. With this information Thoits can make better decisions about their

THOITS INSURANCE

Vital Statistics

- One of the largest 100% employee owned insurance brokerage firms in the U.S.
- Insurance brokerage, employee benefits and risk management consulting
- Based in San Jose, CA, USA
- <http://www.thoitsinsurance.com>
- License # CA: 0243213

Business Challenges

- Increase the efficiency, scale and ease of use for the sales organization
- Increase visibility with automated key performance indicators (KPI's) per product/service, region and carrier.
- Improve customer responsiveness through better tracking from prospecting to customer renewal

Solution

Assessment, optimization and training of salesforce.com delivered by MondayCall Solutions

Results

VISIBILITY

Better visibility into pipeline and on key performance indicators of the business.

ADOPTION

Increased usage equals better data. Improved workflow and end user training helped sales organization better adopt salesforce.com

INCREASED RESPONSIVENESS

Better tracking of suspect and customer interaction improve customer responsiveness

business. Ultimately, Thoits wants to be as responsive as possible to their customers and to follow through on their needs in a timely and efficient manner. One of the major goals for selecting salesforce.com was so that they can focus their time and energy on their core business and have salesforce.com be a key enabler to their business.

SOLUTION

MondayCall Solutions performed an assessment, optimization and training. MondayCall Solutions worked closely with Thoit's management to understand Thoit's business lines and architect a best practices solution that would help Thoits accomplish their goals. Improvements to their system included:

Integration with their AMS system.

- Simplifying the business process flow of Salesforce – reducing the number of steps and integrating Salesforce with their existing environment (e.g. Microsoft Outlook, mobile, etc.)
- Improved tracking of suspect and customer information through proper architecting of data model, creation of a closed loop process on customer lifecycle from email prospecting to web registration, to closing of customer and on to renewal.
- Integration with financial accounting to reduce manual steps and to improve data accuracy and consistency.
- Creation of management dashboards to give Thoits accurate, up-to-the-minute visibility into pipeline, sales people activities on accounts and performance indicators by products/services, regions and carriers.
- End user training so that sales people have all the necessary information to help them succeed with salesforce.com

BUSINESS SUCCESS

Thoits Insurance benefits significantly from the following:

- A closed loop process that tracked every lead from prospecting to renewal
- Accurate forecasting reports that show all stages of the pipeline providing better status and planning data.
- The ability to track key performance indicators (KPI's) for products/services, carriers and regions
- Increased user adoption through training and improved, simplified and efficient workflow for sales people to track all sales related activities
- Better responsiveness to customers

"MondayCall Solutions helped us create a realistic roadmap to meet our needs. They provided guidance every step of the way. Our project deadline was very tight...they met it without any issues."

- Bahia Fear
AVP Corporate PM at Thoits Insurance

