

# CASE STUDY

HEFFERNAN  
INSURANCE BROKERS

HEFFERNAN DEPLOYS  
SELECTSOLUTIONS  
TO MAXIMIZE QUALITY OF  
SERVICE FOR ITS SMALL  
BUSINESS CLIENTS

## CHALLENGES

Heffernan developed a robust small business division that produced and serviced all types and sizes of small business accounts in a proactive and consultative manner. However, there were efficiency barriers that made it difficult to maximize a high level of service, especially as it related to non-standard small business.

Agents were doing a minimum of triple entry for every prospect and client, as they use a CRM, an agency management system, and many carrier rating portals — all of which operate on different software platforms. This redundancy took away from the time sales and service staff had to converse with clients.

Heffernan noticed that servicing small business clients required many of the same customer service processing demands that larger accounts required, yet the number of accounts and transactions a customer service representative encountered each day was huge. Major agency management systems do not provide the most expedient processes and efficiencies for small business insurance servicing. This disparity made it difficult for CSRs to efficiently manage and provide the highest level of service to a reasonable client base.

In addition to assisting clients who called in or were referred, Heffernan was trying to address the needs of small business owners who searched the web for insurance. Unfortunately, they struggled with understanding expressed behavior — offline and online — of clients and prospects, which resulted in campaigns that created few opportunities.

## SOLUTIONS

Heffernan partnered with SelectSolutions to increase customer satisfaction and improve customer acquisition efforts. Heffernan expects that by partnering with SelectSolutions, their small business clients will enjoy a more consultative relationship and have access to greater small business risk management resources.

## RESULTS

- SelectSolutions' end-to-end microbusiness solution has increased Heffernan's small business efficiency by 50%
- An internal lead quality study identified that over 60% of all new leads will result in immediate sales action
- Average close rates are over 30% — far exceeding performance expectations

“SelectSolutions gives the Heffernan Group a real edge,” said Mike Heffernan, founder and chairman of the Heffernan Group. “Servicing microbusinesses is traditionally very difficult, but it is a huge market that’s important to the economic health of this country. SelectSolutions’ end-to-end microbusiness insurance platform solves a lot of fundamental business issues for us, and will ultimately benefit small business customers.”