Meet Canopy

Insurance agency tackles open enrollment lead surge with Sell

About the Company

Canopy is a Kansas-based insurance agency established in 1976 that specializes in health and supplemental insurance.

The Challenge

After the Affordable Care Act was passed in 2010, US insurance providers were flooded daily with new leads and calls. This was the case for Canopy, an insurance agency specializing in health and supplemental insurance. When a major US insurance provider contacted Canopy to help handle their overflow following ACA open enrollment, Vice President of Operations Justin Fallein knew he had to find a customer management tool to tackle their inbound sales calls and bring the Canopy team into the digital age.

For many years Canopy did not have a real CRM system in place. Through the years they had gone through some legacy solutions, and many were tracking their content on their own using spreadsheets. However, neither of these solutions gave a holistic or collective view of the agency. When their volumes began to drastically rise, Justin realized the need for an actual CRM solution.

"We needed a way we could document all of our correspondence and calls. There were going to be multiple people that would need to know the result on the back end, so we needed a program or system that not only multiple people could view to see results of, but would also be easy for the agent taking that call to use as well," says Justin. To tackle the recent rise in calls and correspondence the team needed to find a way to track inbound calls from beginning to end. This led Justin to do research on various CRM solutions himself, and Sell's "intuitive, easy to use and functional" platform appealed to Justin right from the beginning.

The Solution

Today, Canopy turns to Sell for everything from customer and sales management to document storage. Sell is now used by in-house producers, agents and account managers alike. One reason it has become largely adopted is because Sell is an adaptable, real-time CRM solution. Justin describes that with Sell, "you know if something changes, it's real time. I could have a producer come in and say hey I have got this new lead source that I am going to get stuff from. I can go in the system and add that. It's not a big deal, it's real time."

Sell also adapted to the many facets of Canopy's services. "The thing we like most about it is how functional it is. We have different products, different types of sales cycles, and it's a great way to kind of make sense of all those, track and manage all those," says Justin. With customization and real- time data driving adoption, Canopy can now tackle any uptick in leads knowing that they have an effective solution in place managing their process.

The Results

For Canopy, Sell has resulted in a new level of customer and sales management. Prior to Sell, CRM was more of an individual process and less compiled and comprehensive. Today, this archaic process is a thing of the past.

Canopy now has greater perspective into their data thanks to Sell's reporting and analytics. Justin explains that in the past, the systems they had in place were very broad based.

"We really couldn't dig into the data. So Sell has really taken us to the next level as far as being able to do a lot more with the data that we compiled," says Justin.

With over a year and a half with Sell in the books, Justin looks forward to taking on the next open enrollment season with Sell.

Success Made with Sell Solutions

These solutions help Canopy take their sales to the next level faster than ever.

Rep Productivity	Mobile Sales Management	Reporting and Analytics
Make every action count with tools proven to make sales reps 10x more productive.	Sell, manage and analyze on the go with Sell's full-featured mobile CRM.	Uncover data-driven sales insights with robust, out-of-the-box visual reporting.