



Case Study: Integrity Financial Advisors

The Client

Integrity Advisers is a Chicago area based Insurance Broker focused on providing health care policies to individuals and supplemental policies for seniors over 65. Rich Ziemianski and Linda Signore are the two principals of the firm. With the help of Logan Consulting they have fully embraced and integrated their daily business operation with Microsoft CRM.

The Opportunity

Integrity Advisers had been running their business operations within a custom ACT on-premise multi-user system that greatly limited their potential for growth. At the time, they had 12 users in the system, but unfortunately 12 users pretty much maxed out ACT, and Integrity was looking for a long-term solution that could grow and adapt as their business grew. Integrity wanted a solution that could expand and adapt to their business model. Adding users was a hassle and their old server suffered multiple crashes and other daily issues that was limiting productivity.

The Solution

Integrity works in the insurance business, with no on-site IT support presence, so it was important to fit them with a software where they wouldn't have to worry about hardware upgrades every few years to maintain a current environment. To address the issue, Logan Consulting first looked at their current ACT on-premise multi-user system and saw a lot of potential within the CRM online platform for growth. Logan Consulting began by converting their user system to the Microsoft Hosted CRM Online system and fit Integrity with a customized version of CRM that would make it easier than ever to provide analytical reporting for current and future needs. In addition to implementing Microsoft CRM, Integrity now has easy Integration with 3rd party tools to grow the business like Click Dimensions for Marketing Automation, and Scribe for Data Import and integration with other outside systems. Once this system was fully customized and configured, employees were trained through test scenarios in order to fully understand the system and achieve optimal results.

The Results

- **Ease of adding new users** – In about 20 minutes Integrity has the ability add new users and has grown from 12 users to 40 plus users. They currently operate thru-out the entire state of Illinois, and have recently expanded their operation to the State of Texas, with an eye toward expansion in the near future to other states.
- **Flexibility of the system** – Integrity now uploads their monthly commission statement into CRM and performs monthly reconciliation in about 8 hours. Prior to this, it required 2 people spending nearly 40 hours to manually go thru nearly 600 printed pages of statements **each month** to audit and reconcile the statements. This new efficiency allowed them to uncover mistakes in commission payments – with recovery of over 6 figures of revenue in un-paid commissions in the past year.

- **Advanced Analytics and Reporting** – Able to quickly perform year over year analysis, and breakdowns by category and sales reps. Pairing the Scribe Tool and Microsoft CRM online has allowed Integrity to run timely reports to CRM to show what Insurance policies have been effective and the commissions being paid on them. This critical operation has been made significantly easier.
- **Advanced Find Capabilities:** Integrity enhanced their call center operations through the use of Queries and advanced finds. They now generate daily call lists for their call centers which is for daily operations and generating new business.
- **Customer Retention** – Since client payments are made to the insurance carrier, Integrity Advisers did not always have a clear idea of when a client may drop a policy. With more efficient reporting and quicker commission processing, they able to quickly identify potential policy loss and dramatically improve customer retention – a key metric in their business.