Beyond Insurance leverages ClientSuccess to decrease time to adoption from 1.5 years to 6 months.

Beyond Insurance provides insurance brokers, carriers and agents with the tools, opportunities, services and strategies they need to realize their full potential. The Beyond Insurance Global Network (BIGN) is comprised of about 70 independent insurance agencies that are in geographically-exclusive territories. These insurance agencies aren't competing with one another, so they have the opportunity to network, learn and connect with each other.

The Challenge

Ashley Correll, Chief Operating Officer at Beyond Insurance was the first employee to come aboard the company back in 2009 when it had just three or four clients. Over the past 10 years, the company expanded rapidly and now has about 70 clients that are part of its global network. Because Beyond Insurance is a small company, its employees do a bit of everything.

Ashley and her team needed assistance with:

- Client engagement
- Managing their growing client list
- Tracking team member activities
- Data organization

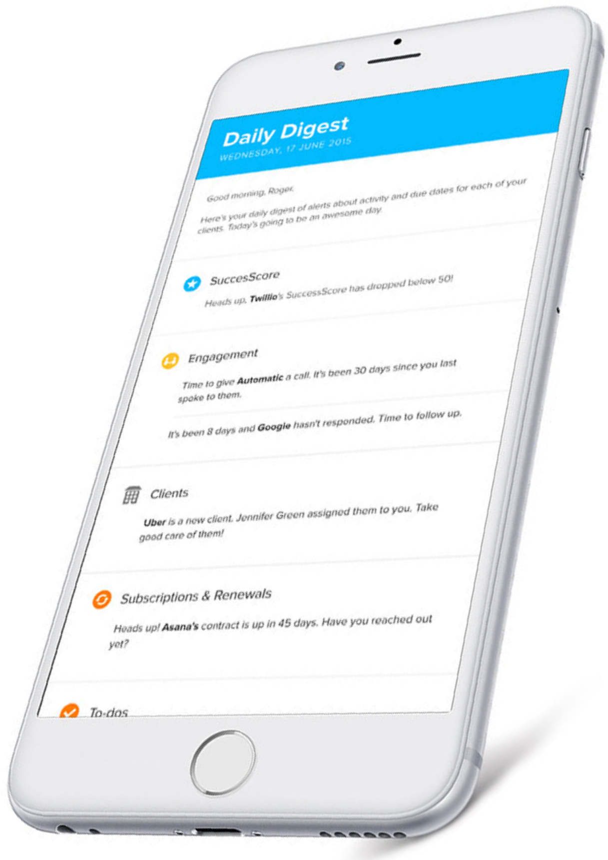
Reasons Went with Client Success:

1. The solution had everything Beyond Insurance was looking for even though Ashley wasn't really sure exactly what they needed until she saw ClientSuccess.
2. The ClientSuccess platform was very easy to implement and there wasn't a big learning curve.
3. Working with a dedicated account manager made the process simple.
4. Lots of features for the price and an excellent tool for their small, but growing, business.

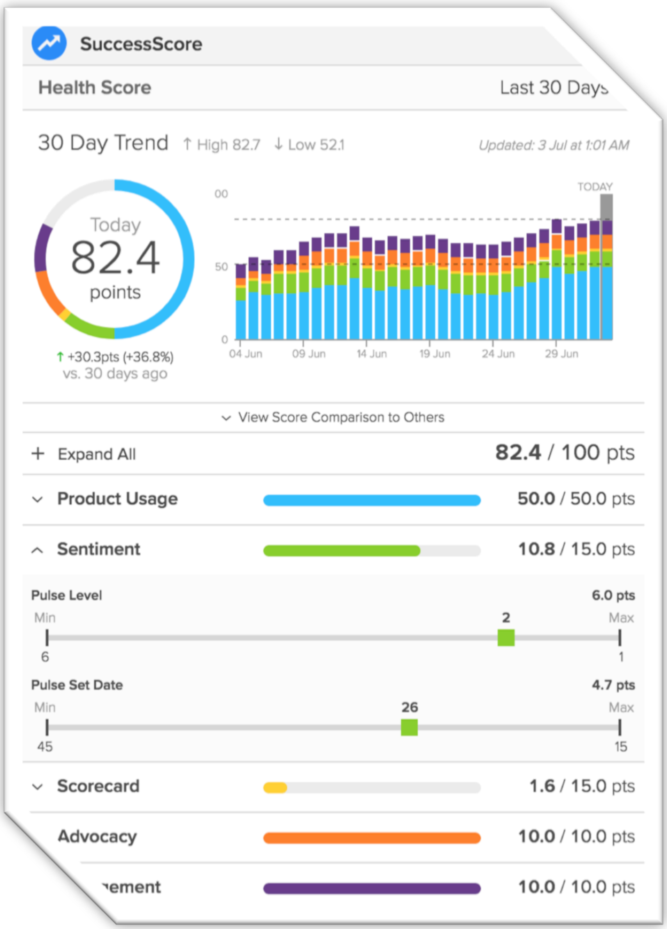
1. Data Consolidation

Prior to starting with ClientSuccess, Beyond Insurance had no CRM system in place. Ashley was using a combination of Outlook and Excel for data consolidation and managing clients. "And as we just kept adding more and more, I knew that we needed some type of solution to not only track contact information and basic information that way, but also be able to see where we are in our version of success cycles," noted Ashley.

"We have a lot of data and needed somewhere to organize it. For example, we need to track where we are in our engagements with our clients because everybody was coming it at different times so everyone's in different renewal cycles. It was too much data that needed to be stored that led me to ClientSuccess."



2. Customer Pulse and SuccessScore



"Every year we do a formal check-in with each agency. That's when their Pulse gets updated on our side. Using the Pulse has been huge because when we do have issues, we put it in right away and it's in red. This forces us to not forget about the client. With a small team, it's really helpful to have a systematic process to make sure that we're checking in with them if their engagement is low or if they haven't responded to our emails, for example."

"Our contracts with our members are three years, but we realized that our clients weren't really using all of our tools until about a year and a half into their contracts. By following the Success Cycle, we have been able to cut that time to six to nine months instead. With ClientSuccess, we now have a system that we can track each of our members to make sure they're all getting the same experience. It's also been able to give us a better sense of the overall health of our clients. This finding is now based on the collective data within the platform rather than just on the individual perspectives of the team members."

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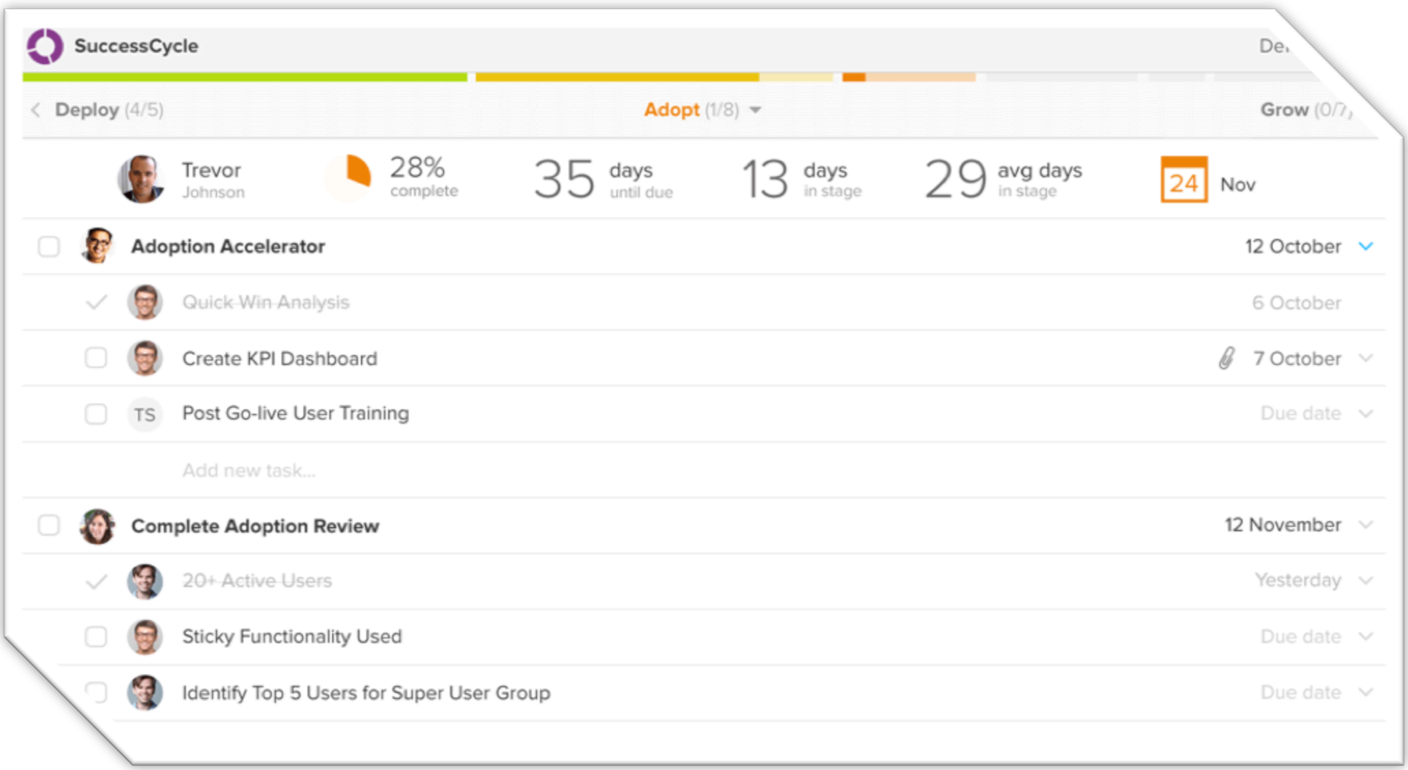
3. Lifecycle Management

"Being able to track our last engagement with a client was huge. So was having an archive of all of our messages. As we were expanding our team and because we are all remote, we weren't aware of who was talking to which client. With ClientSuccess, I could see that Matt, my coworker, talked to this agency and already got that information so I could check that off."



4. Why ClientSuccess

"I did a lot of research to find this platform in particular. It really met all our needs and also the price point we were looking at. We were going from using free options and we wanted to do something that was reasonable," Ashley noted. She said that while price was a factor, it wasn't the most important one.

ClientSuccess has everything that Ashley and her team need and use. "There aren't many features that I don't use at all. The SuccessCycles was something that I didn't even really know I was looking for that until I found the platform."

Implementing ClientSuccess was very easy for Beyond Insurance. They simply provided ClientSuccess with a template and their contacts were imported seamlessly. "Sam's been wonderful! It's been so nice to have the same account manager. We use a lot of different services and I'd get so frustrated when we'd lose great account managers all the time."