

For Insurance Agents, Carrying GlobalSearch® Is a Great Policy

Farm Family Central CT is a rapidly growing, multi-line insurance agency providing farm, business, auto, home, life and disability insurance policies to clients throughout Connecticut, Massachusetts and other areas. Located in Vernon, Connecticut, a picturesque New England community just east of Hartford, the agency is the headquarters for three insurance professionals who are agents for Farm Family Casualty Insurance Company and Farm Family Life Insurance Company.

This prosperous agency has earned the loyalty of many generations of families by developing close relationships with its clients and by offering multiple insurance lines, including farm insurance which many insurers simply will not write. The agency even offers equine insurance policies. Farm Family Central CT's insurance agents are Ross Luginbuhl, the most senior agent; Ronald Hocutt; and Bo Muschinsky, the newest agent in the tight-knit group. "We are truly a team, if ever there was one," Hocutt said.

"Our goal is to make sure that all aspects of our clients' lives are protected, and we take that job very seriously," Hocutt explained. "We actually sit down at our clients' kitchen tables so we can better understand their concerns and worries, and we get to know them and their families very well. Most agents stopped doing this many years ago. As a result, we have established relationships with three and four generations of families who will not consider going elsewhere. Our retention rate is about 98 percent."

GlobalSearch quickly proved to be a great fit for Farm Family Central CT's heavily document-based business and highly personal service style. The solution helps the agency avoid the challenges and costs associated with accessing and storing paperwork for generations of clients, while its advanced mobility features are enabling the agents to fill the insurance needs of their client families more efficiently and profitably, even while seated at their kitchen tables.

"By leveraging ourselves with GlobalSearch, we were able to immediately begin to improve customer service and streamline our workflows," Hocutt explained. "We saw a 25-percent efficiency gain in just the first few months. As a result of



25%
Efficiency
Gain

Snapshot

Industry:

Insurance Agency

Departments Impacted:

Administration and Compliance

Featured Products:

GlobalSearch

Objectives:

Ensure regulatory compliance; streamline document access and eliminate paper storage costs; access documents while in the field and automate key business process workflows for greater efficiency and profitability

installing GlobalSearch, we have been able to write a lot of additional business without having to bring on more agents or staff. GlobalSearch not only helped us reduce costs, it has contributed directly to our bottom line. *It has also allowed us to effortlessly comply with increasingly complex industry regulations and ensure that our data is backed up and completely secure.*"

The decision to implement a Content Management system was a "no-brainer" for these tech-savvy agents. "Ross was a big believer in using technology to address our paper storage challenges," Hocutt said. Having acquired 18 years of experience in the software development field before going into insurance, Hocutt saw an opportunity to automate the agency's business processes as well. "We recognized in GlobalSearch a sophisticated, value-driven solution that would be easy to learn and use," Hocutt recalled. "This attractively priced solution has proven even more profitable than either of us imagined."



**Value-
Driven
Solution**

Before installing GlobalSearch, all insurance applications, policies, certificates and other related documents existed as paper records and had to be produced, transmitted, retrieved and stored by hand. "Some of our file folders were five inches thick and we might have six or more of them going back 20 years

for some of our clients," Hocutt said. "These records filled 16 file cabinets six feet tall and four feet wide and occupied office space equivalent to three cubicles."

Today the agency uses GlobalSearch to manage documents electronically, freeing up space for more productive uses and avoiding storage expenses. Most importantly, these documents can be quickly accessed and processed using customized GlobalSearch workflows by agents in the field and customer service representatives (CSRs) in the office.

The agency realized an extremely quick initial return on its GlobalSearch investment. "We were in the black almost immediately, just because of the costs we avoided by not taking additional storage space,"

Hocutt reported. "On top of that, I estimate that the many hours saved by our agents and CSRs using GlobalSearch is worth \$20,000 to \$25,000 annually."



\$20k-\$25k
Saved
Annually

According to Hocutt, the agency is generating at least 25 percent more business annually without having to hire additional agents or CSRs – skilled and well-compensated professionals. "GlobalSearch has not only saved us money, it has generated greater revenue and profit," Hocutt said. "Now, our goal is to drive everything through GlobalSearch that we possibly can and grow our book size by 50 percent in two years without adding fixed costs. We simply could not do that without GlobalSearch."

"I regularly recommend GlobalSearch to other insurance agents and will continue to do so," Hocutt concluded. "GlobalSearch's capabilities, functionality, ease of use and value make this solution a great fit for our agency, and Square 9 Softworks' commitment to providing great products and backing them up with outstanding service is consistent with our own business philosophy."