

ASTONISH RESULTS' AUGUST e-MARKETING AGENCY OF THE MONTH

A MULTIFACETED APPROACH

Sales culture built on foundation of service

Like most agency leaders, Marc Duffy, marketing vice president at Boston-area Duffy Insurance, wears many hats. "I do a lot of different things," he explains. "I kind of see where the day takes me." The daily to-do list might include sales, management, customer service, marketing or something else. "Marketing is definitely my favorite," he admits, "and it's one of my major responsibilities."

Duffy Insurance opened its first office, in Lynn, Massachusetts, in 1996 and acquired another agency five years later. "In 2006, we opened an office in Peabody," Duffy notes, "starting from scratch, without a book of business. I graduated college on a Saturday and we opened the doors on the following Monday."

To build the business, Duffy did all of the standard things—cold calling, asking for referrals, networking, advertising and more. Over time, efforts expanded to include e-mail marketing, a focus on building niche business, and attention to account rounding. Business was good, but sales and marketing efforts were, as Duffy describes it, "all over the place."

Then someone on Duffy's staff forwarded him an e-mail about a company that helps agencies grow their business. "I looked at their Web site and it had an e-mail marketing tab, an account rounding out tab, a commercial booster tab," he recalls. "I said to Pete, the guy who passed along the e-mail, 'That's what we are doing.'" Before long, the agency signed on with Astonish Results, which, as Duffy says, "came in and helped us tie the different pieces together around a central hub, which worked out perfectly for us."

Today, the agency's electronic marketing initiatives are well organized, Duffy notes. "We had the ideas right, but working with Astonish helped us put them into high gear, because now we can do everything in unison," he explains. "From a branding standpoint, we can deliver a much more powerful message to our commercial niches and to our personal lines customers, with less work, to be honest."

Building on service

The new partnership helped the agency develop a sales focus based on



Marc Duffy (far right), Marketing Vice President for Duffy Insurance Agency, Inc., appears with (from left) Peter Diamantides, Account Executive; Stephen E. Duffy, CISR, Commercial Vice President; and Paul Duffy, President.

one of its key strengths—service. Duffy implemented Astonish Results' training to show the relationship between the two. In one session, the trainer asked, "Who here thinks that Duffy Insurance agency is the best agency to work with?" According to Duffy, every single person raised their hand. "He followed that up by saying, 'Then every single one of you should try to get as many customers through these doors as you can,'" he added.

The exchange helped spark an agency-wide culture shift. "The message got across and the change in mindset clicked with everybody, even me," Duffy notes with a smile. "Too often, we're scared of the s-word, 'sales.'"

Results of the shift showed immediately in account rounding. "For



DUFFY INSURANCE AGENCY, INC.

Photography by Sam Riche



instance, CSRs who worried about having to sell something latched on to the idea that when they bundle accounts they are actually providing better service,” Duffy explains. “We’re saving customers money and we’re bringing a client who might have had a policy or two elsewhere—at an agency not as good as ours—into a closer relationship with us and our service. We’re doing them a favor!”

The approach ties directly to the agency’s electronic marketing initiatives. “Before, if a customer called in and we noticed that they had just an auto policy or just a home policy we might casually mention possible discounts or other products,” Duffy recalls. “Or we might mention it in our e-mails.”

However, it was inconsistent, at best. Today, the agency is diligent about seeking e-mail addresses and is using Astonish Results’ automation to segment customers and prospects, which drives consistent, targeted communication.

“The more specific we can be with our messages and the audience, the better our chance of success,” Duffy says. “Now, we’re really able to break out customers and prospects and personalize our messages to them, and the results have just gone through the roof.”

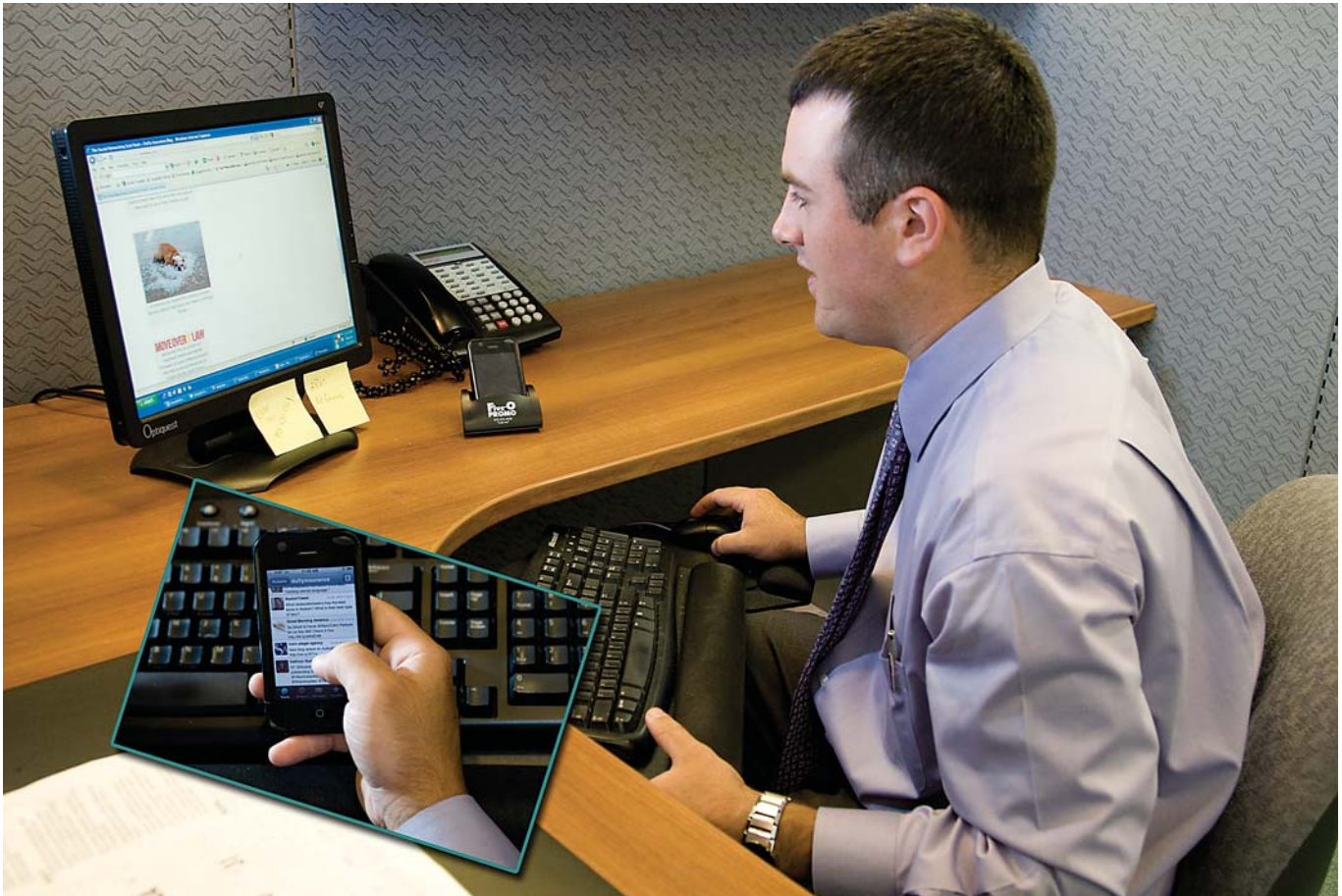
A key element in the success was generating staff buy-in. As part of the e-marketing implementation, the agency tapped Astonish Results’ staff to explain the initiative and generate

excitement. “Our people are generally entrepreneurial and they’re very open to new ideas,” Duffy notes. “They got fired up and, almost instantly, we saw bundling go from four or five successes a month to upwards of two dozen!”

The agency incorporated incentives to help drive the growth. “We put in a bonus program that offers a little extra money for reaching certain targets,” Duffy explains. “Our staff gets excited now when they’re able to round an account. Interest has grown among the ranks and, for many, it’s become habit.”

Engaging community

Another key element of the agency’s electronic marketing success



Marc Duffy uses his smartphone as well as his desktop computer to make the most of the agency's blended marketing strategy.

involves social networking. "We're using Facebook to communicate with our customers and prospects and to build relationships with them," Duffy points out. He uses both his personal account and an agency Facebook page to do this.

The Duffy Insurance page has hundreds of friends. "We usually update that daily," Duffy notes. Updates range from insurance and risk management advice and client and employee recognition to notification of upcoming events and recommendations to local businesses the agency believes would be beneficial to its followers.

The agency incorporates the use of Twitter, Animoto video and blogging in its social networking and electronic marketing efforts. More than incorporate, the agency integrates the tools. For instance, a recent @DuffyInsurance tweet said, "Just made a video on Animoto called 'Duffy Insurance Summer Savings'..." An announcement also appeared on the "Duffy Ins" Facebook page.

The simple video highlights client savings and stresses the value of dealing with an independent agency.

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—Marc Duffy
Marketing Vice President
Duffy Insurance

In addition, viewers can easily share the video with others via Facebook, Twitter, MySpace, e-mail and more.

Earlier this year, the agency used social media to raise money for The Jimmy Fund, a Boston-based charity dedicated to fighting cancer in children and adults. The agency featured the charity and its fund-

raising efforts on its Web site and was able to use the effort to strengthen agency-customer relationships.

Bolstering commercial lines

Duffy Insurance is taking electronic marketing to the commercial insurance sector, as well. "We have been very involved in traditional networking for commercial insurance purposes," Duffy notes. "We go to industry events and get to know people and demonstrate our insurance and risk management expertise in specific types of businesses. It works."

Today, the agency accomplishes even more by adding electronic networking and communication to the mix. "Now, we can use very targeted e-mail campaigns to reach businesses—on whatever schedule we set up," Duffy notes. "With the campaigns, we can see who is opening the e-mails, and we can follow up with them directly and make sales."

In addition, the agency is sharing its expertise on industry-specific blogs as part of its electronic marketing work. Not only do blogs demonstrate

expertise, but they are noticed by search engines, Duffy points out. "For instance, when someone searches 'restaurant insurance,' we want to be at the top," he adds. "Blogging is a great way to get that recognition."

As the agency builds an even stronger blog presence, Duffy is engaging staff. "Our people know about insurance; they're experts," he notes. "Who better to ask to write a blog about insurance or to post something about insurance on our Facebook page or to help with copy for direct mail pieces?"

He is seeing benefits from his multifaceted approach. "It's e-mail marketing, blogging, Facebook and, of course, the traditional networking, because obviously that still works," Duffy explains. "But using them all together is much more powerful than just the traditional route."

Strengthening relationships

Of all of the agency's electronic marketing initiatives, Duffy sees special promise in Facebook. "Social media, and Facebook in particular, provides a tremendous advantage for independent agents," he explains. "I compare it to when the Internet came around; that was a huge advantage

for direct writers. Social media for insurance agents is that big."

It's because Facebook, in a way, replicates online the relationship focus of independent agents. "Throughout your life, you meet people and some become customers and some don't," he explains. "For instance, I have guys that I played Little League with, and guys I went to middle school, high school and college with. Some are customers here at Duffy Insurance; they went to my dad for their insurance."

"One great thing about the insurance business is you can stay in touch with many people," he adds. Facebook parallels that. "As you meet people throughout your life, you can add them as friends on Facebook, and you have a ready-built way to stay in touch. And they are your target market. Used right, social media offers us a huge advantage in leveraging relationships."

Of course, he notes, it still is a people business. "Relationships are what we're all about," he explains. "And that involves people inside the agency as well as outside." According to Duffy, the agency's electronic marketing initiatives are helping staff bolster relationships by focusing their efforts, which frees up time to focus on service.

"Rather than having people run around in different directions, this ties it all together," explains. "They're not doing things completely differently, just more efficiently." For instance, they're diligently asking for e-mail addresses, because that helps the agency communicate more effectively and quickly. They're adding friends on Facebook because that allows the agency to build and maintain relationships with less effort.

Best of all, he says, people are able to deliver better personal service. "There are times customers want to sit down and talk, and times they want to talk on the phone," he notes. "Electronic marketing automates the parts of our business that don't require that intense personal interaction, which allows us to provide the human touch and true service and counsel that sets independent agencies apart." n

See it now

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