

CASE STUDY: CRM TRANSFORMATION FOR INSURANCE BROKERS

Consultant: Jof Davies

Role: CRM & Data Systems Consultant

Clients: Consilium Employee Benefits, Chase Templeton, Towergate Insurance, Square Mile Broking, Clear Insurance

Overview

From 2009 to 2018, I led a series of CRM transformation projects across several insurance brokers and employee benefit providers. These included full data migrations, process redesign, automation, and staff training. Each project delivered measurable gains in efficiency, sales performance, and data integrity while ensuring continuity through multiple mergers and acquisitions.

Challenge

The client group operated on a mix of legacy systems and spreadsheets, leading to duplicated data, limited reporting, and poor visibility of sales activity. When Consilium Employee Benefits was acquired by Chase Templeton, and later by Towergate, CRM continuity and data accuracy became critical to business performance. The brief was to design a scalable CRM solution that would centralise client data, automate communications, and streamline telemarketing and renewal campaigns.

Approach

- Won the tender to migrate Consilium's legacy CRM to CallPro.
- Specified system requirements with business leadership, focusing on automation, reporting, and client engagement.
- Project managed the full build, testing, and deployment process including flawless data migration and deduplication.
- Designed structured data hierarchies separating clients, ex-clients, and prospects.
- Created automated email and telemarketing workflows based on renewal dates, prospect intention, and client status.
- Delivered hands-on training for all staff and continued to provide support and upgrade planning.
- Provided regular troubleshooting sessions with management to improve efficiency and identify new automation opportunities.

Results

- Achieved seamless data transfer and zero loss of records across three ownership transitions.
- Automated custom reporting suite giving insight into premium values, client sectors, telemarketing activity and performance
- Increased lead conversion and client retention through automated renewal and timely email marketing campaigns.
- Provided consistent, compliant communication across the sales and telemarketing teams.
- Built management dashboards and reporting systems that allowed leadership to track performance and pipeline value in real time.
- Developed a video-based telemarketing presentation system to replace brochureware, improving message clarity and conversion rates.

Client Feedback

"Jof at Super Rad was exceptionally helpful. He found us the right product that could deliver both the call numbers and the email marketing that we do daily. The service delivered by Jof and his team was exceptional." – David Garrard, Square Mile Broking

Summary

This series of projects demonstrated how a well-designed CRM can transform efficiency and sales outcomes within the insurance sector. My approach combined technical data management with an understanding of how insurance sales teams operate, resulting in lasting improvements in lead handling, communication quality, and business reporting.