

Challenge

To comply with industry regulations, American Health Insurance required a solution capable of managing the many details associated with the insurance brokerage business.

Solution

ACT! Premium provides a robust and flexible database to store vital data and communications with customers.

Results

American Health Insurance attributes 50% of its success, measured in customer count and sales volume, to the efficiencies and functionality delivered by ACT! Premium.

Customer

American Health Insurance

Industry

Insurance

Location

Northridge, California

Number of Locations

One

Number of Employees

Nine

System

ACT! Premium

Add-On Product eMail-Lead Grabber

Note: Beginning with the 2011 version, ACT! by Sage is now called Sage ACT! and ACT! by Sage Premium is now called Sage ACT! Premium.

ACT! by Sage Premium is a Robust Solution for American Health Insurance

American Health Insurance has been seeing healthy returns since its inception—ranking among the top five insurance brokers in California for four years in a row. The Internet-based company attributes its success to its exceptional level of customer service and its well-organized business. American Health Insurance depends on ACT! Premium as the tool it uses to stay organized and competitive.

More Than Contact Management

When Chuck Mondrus started American Health Insurance, ACT! Premium was the first piece of software he purchased. "I rely on ACT! by Sage to keep me organized; I've used it for years. When I started this company I didn't hesitate to implement ACT! Premium here, expanding its use into a complete business management solution."

American Health Insurance uses ACT! Premium for much more than a contact management solution. In addition to holding more than 70,000 of the company's customer and prospect records, it serves as a complete business management database, storing and tracking the myriad of facts, details, and documents necessary for any insurance business. "The database is vital to the company's success," Mondrus says.

Go Paperless

The insurance industry is governed by numerous regulations. To protect itself, its clients, and the insurance carriers, American Health Insurance must track all of its communications with customers. ACT! Premium is the receptacle for communication details—every email message sent or received is recorded in the contact record, every document is stored, every phone call is tracked, and notes of conversations are entered into the Notes tab in ACT! Premium.

Customer Success | American Health Insurance

"We are completely paperless," says Mondrus. "Every document we send out is electronic and every paper document we receive is converted to electronic format and stored within ACT! Premium, attached to a customer's record. We send out customer correspondence directly from ACT! Premium and every incoming email or phone call is recorded in ACT! Premium too."

Enjoy the Flexibility

American Health Insurance invests in Internet advertising, including pay-per-click ads that drive prospects to the company's website where they can fill out an interest form. Using an addon solution available for ACT! Premium, eMail-Lead Grabber from eGrabber, form data is sent to ACT! Premium and generates a new Contact record. The solution also collects prospect data from email messages the company receives.

"I believe in investing in technology," says Mondrus. "We process between 200 and 350 applications each month, and we're able to do it with a lean staff because of ACT! Premium and its surrounding technology."

Mondrus appreciates the broad flexibility of ACT! Premium which allows him to set up dozens of custom fields to track the information specific to his business. The fields are then organized within tabs which keep the data easily accessible.

The company has set up dozens of email templates within ACT! Premium. The templates speed communication and ensure that American Health Insurance presents a consistent and professional image with each message it sends.

Group Data for Action

ACT! Premium provides the real-time information Mondrus needs to keep American Health Insurance in prime health. One way is through the Groups function. Mondrus has created dozens of groups and subgroups that enable him to segregate the database into collections of contacts with something in common. Mondrus makes use of both dynamic and static groups, depending on the application.

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- Chuck Mondrus American Health Insurance

"I have groups for Submitted Applications, Enrolled, Declined, and Lapsed, for example," he explains. "Members in these are dynamic groups have a certain value in their contact record. They flow in and out of a group depending on their status. I also have a static group for the year's sales that contains all customers added within the year."

This database structure enables Mondrus to generate queries, lookups, and reports for a particular group. And he can generate email communications, reminders, and tasks by group quickly and easily as well.

Be a Model of Efficiency

Other insurance carriers, noting his company's efficient operation, have asked Mondrus to present seminars on his secrets.

"I show them how I use ACT! Premium to keep on track," Mondrus says. "It wouldn't be a stretch to say that 50 percent of this company's success is attributable to ACT! Premium. It's that important and valuable to us."

Sage ACT! makes it easy for you to have meaningful conversations with customers by giving you an organized view of the people you do business with. Like the millions of individuals in small businesses and sales teams who use Sage ACT!, you'll always be prepared with recent emails, meeting notes, task reminders, and social media profiles, because all of these details live in one place. You can even use Sage ACT! like a sales and marketing assistant to get the right leads, send striking marketing campaigns, and track your overall performance. The bottom line, Sage ACT! takes care of the administrative stuff so you can focus on building long-lasting, profitable business relationships

About Sage North America

Sage North America is part of The Sage Group plc, a leading global supplier of business management software and services. Sage North America employs 4,000 people and supports 3.1 million small and midsized business customers. The Sage Group plc, formed in 1981, was floated on the London Stock Exchange in 1989 and now employs 13,100 people and supports 6.2 million customers worldwide.

