

Customer Story: Westminster American

Industry

Insurance

Solutions

FSC, Sales Cloud, Pardot

Staff

25+ Employees

HQ Office

Owing Mills, MD

Westminster American Insurance Company was chartered in Maryland in 1869 as the Mutual Fire Insurance Company of Carroll County. The founding purpose was to protect the financial interests of home and farm owners in rural Carroll County, Maryland. Since then, the company has grown significantly to focus on commercial real estate in the Mid-Atlantic region, the East Coast and are working on expanding South as well.



Salesforce Challenges

- ⦿ WAIC did not have the ability to report on Policies by Agency or Agents.
- ⦿ They were unable to report on Policies by Region.
- ⦿ They had an inability to track the gifts going out to high performing Agencies or Agents.
- ⦿ WAIC was unable to prospect for new Agencies or Agents.
- ⦿ Integrations between marketing systems & internal systems did not exist.
- ⦿ Leadership was unable to access reports real time.
- ⦿ Integration between the quoting system and Salesforce did not exist.

Access Global Group Solutions

- ⦿ We implemented FSC & Sales Cloud to align with the new redefined process.
- ⦿ Pardot was implemented as a way to automate email prospecting for Agencies or Agents.
- ⦿ We built custom integrations using web-services between Salesforce & Fins.
- ⦿ Custom Dashboards were created to assist marketing & executive level teams.
- ⦿ Custom components were implemented to support the customer's unique needs.

Salesforce Results

- ⦿ Real-time Reports to Policies by Agency or Agents, Regions and attributes.
- ⦿ Real-time reports to track gifts to high performing Agencies or Agents.
- ⦿ Enabled customer to prospect for Agencies or Agents. Helped them increase their Agencies or Agents recruitment by **15%**.
- ⦿ Leadership is able to access a real-time dashboard for intelligent forecasting.
- ⦿ Reduced the Manual Work for the Marketing Team by **50%**.