



CASE STUDY

APPX RETENTION PROCESS

OF PERSONAL LINES AT CLEVENGER INSURANCE



OVERVIEW

Clevenger Insurance has been in business since 1995 and has been a long standing respected business in Warsaw, Indiana. Joe and Gina Clevenger purchased the agency from Joe's father at the turn of the year. With the new ownership Joe and Gina wanted to take the agency to the next level, tackle common agency challenges and boost retention.

SCENARIO

Joe and Gina first contacted Agency Performance Partners prior to completing the purchase of the agency. By following our blogs, videos and content they became interested in how APP could assist the agency to perform. We quickly realized that the agency had a very green team of account managers that could use direction, goals and training. What we found was that while well versed in quoting, coverages and providing a great customer experience the team had a desire to become better at retaining customers. We launched our AppX Retention training module with them in the Spring of 2017.

We started with a ½ day of retention training that included workbooks, scripts and a presentation. This assisted the team to see the bigger picture of keeping clients. From there we broke down every strategy into bite sized, adoptable chunks. We held bi-weekly retention meetings that included accountability, education and celebrating successes.

Here's what we learned about Clevenger Insurance:

- The team was excited to learn new ways to excel at their positions
- They adapted well to the idea of monthly performance bonuses for keeping clients
- Proactively contacting clients leads to decreased stress in the office
- Many clients were interested in increasing their coverages when they are educated



About Clevenger Insurance

Owner: JOE & GINA CLEVINGER

Location: WARSAW, INDIANA

Established: 1975

Biggest Challenge: PURCHASING THE AGENCY FROM JOE'S FATHER THEY KNEW THEY NEEDED A SYSTEM IN PLACE TO FOSTER GROWTH AND THE BEST CUSTOMER EXPERIENCE.

PLAN

Agency Performance Partners started by launching their APPX Sales Program:

- On-Site Training Day
- Sales Workbooks with Best Practices and Scripts
- Sales Tracking
- Leading Bi-Weekly Sales Meetings

After developing the plan, the team became excited to focus on sales and use the techniques that didn't add more time into their workload. When challenges arose APP was there to help work them out with the team!

RESULTS

"Kelly and her team have supported our two main agency goals: Grow organically, and have a marvelous retention ratio. The standard operating procedures developed by Agency Performance Partners creates an outstanding client experience and a culture of sales. Running the agency under Kelly's command has catapulted our agency into future success by building a strong foundation for rapid growth. Agency Performance Partners are simply the best – and we recommend their services to any agency interested in differentiating themselves from competitors."

100%

OF RENEWAL CALLS WERE MADE WEEKLY

60%

OF CALLS LEAD TO CONTACT WITH CLIENTS

39%

OF CONTACTS LEAD TO AN INCREASE
IN COVERAGE OR ACCOUNT ROUND

8

REMARKETS CONDUCTED OVER 5 MONTHS

4%

RETENTION INCREASE IN 5 MONTHS

TAKE YOUR AGENCY TO

THE NEXT LEVEL

CHECK OUT OUR SERVICES MENU!

[HTTPS://WWW.AGENCYPERFORMANCEPARTNERS.COM/
WORKBOOK-PERFORMANCE-THROUGH-GOAL-TRACKING/](https://www.agencyperformancepartners.com/workbook-performance-through-goal-tracking/)



READY FOR THE SAME TYPE OF GROWTH?

CONTACT US

[KELLY@AGENCYPERFORMANCEPARTNERS.COM](mailto:kelly@agencyperformancepartners.com)

+1 401.415.6205