

Salesforce.com for the Independent Agent

A Case Study



We helped one of Columbus Ohio's most innovative insurance agents grow organically...in their sleep... with Salesforce.

New Market Opportunities Created for Hosket Ulen Insurance by Implementing Salesforce

As the number of renters increased while the homeowner market decreased in 2010, Hosket Ulen Insurance Agency needed to make the best of a challenging situation. Utilizing their networks and the guidance of Revolution Group, the agency brought renters insurance sales online with the Salesforce.com platform. They sought a solution that was scalable, customizable, and allowed for the sale of insurance anytime... anywhere. Revolution Group helped Hosket Ulen achieve that vision and now Hosket Ulen is generating new sales and leads in ways that some agents will only dream about.

Leveraging the Power of Salesforce.com Platform.

The Situation:

Hosket Ulen had established the relationships and network to develop new business opportunities within property management operations, and the market was ripe with new renters who needed renters insurance. Brad Hosket, Principal, embraced the opportunity, knowing that he must provide a cost effective method to secure new business. He knew that the ideal solution would be online, automated and would provide the agency with cross-selling opportunities with each new quote or policy issued.



“Revolution Group understands how Salesforce can help you grow a sales culture within an organization. They have been our partner implementing Salesforce and they are helping us build our new sales culture.”

Brad Hosket, Principal
Hosket Ulen Insurance



The Revolution Group Solution

We started with a business flow roadmap that outlined the unique needs of Hosket Ulen, along with the needs of their partner carriers. Utilizing our insurance and Salesforce experience, we developed an e-Commerce site built on the Salesforce Platform that provided a cost-effective, flexible and scalable consumer based solution for writing renters insurance. Based on our Software as a Service (SaaS) architecture and design expertise, the solution provided real-time quotes, issued policies, secured down payments with credit cards and triggered workflows between the agency, carrier and property managers. Other benefits included;

- The addition of automated sales campaigns for cross-selling purposes
- Insight to key performance measurements through agency dashboards and reports
- Increased agency collaboration utilizing Salesforce Chatter
- Better access and storage of data
- 24/7 solution availability

Contact us today.

(614) 212-1111

sales@revolutiongroup.com

Our Five Agreements

- We demonstrate success together
- We demonstrate how success will be attained before development begins
- We deliver on promises made
- We assist in leading user adoption
- We validate success has been achieved

Our Experience

- Silver Cloud Alliance Partner with Salesforce.com
- 17+ years of Insurance Experience
- Offering Insurance specific best practices for agents and carriers
- Certified Salesforce.com Resources, Admins & Developers
- 9.8 out of 10 Customer Rating

