

## Insurance Marketing Organization Ensures Success With Lexnet And SageCRM

### AMZ Financial Insurance Services, LLC

www.amzwebcenter.com

#### Headquarters

El Dorado Hills, California

#### Type of Business

Insurance Marketing Organization

#### Number of Employees:

50

#### Software

SageCRM

#### Number of Users:

30

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Insurance Marketing Organizations, or IMOs, design insurance products, and then market those products to insurance companies and independent brokers. AMZ Financial Insurance Services, LLC is one of the country's most successful IMOs, focusing primarily on life insurance products. AMZ Financial was formed six years ago by four partners with more than 200 combined years of experience in the insurance industry. The company has enjoyed a 35 to 55 percent annual growth rate in each of those six years. Powering the communication so vital to the company's success is SageCRM, supported by Lexnet Consulting Group.

#### Find A Long-Term Solution

AMZ Financial had been using ACT! by Sage, a popular contact management solution, but as Joe Zuccolotto, president of AMZ Financial explains, ACT! simply couldn't keep up with the company's rapid growth. "We needed more power, more flexibility, and better remote access capabilities."

The company launched a five month research project to locate the ideal CRM (customer relationship management) solution. "We looked at several, including Salesforce.com," recalls Zuccolotto. "Many of them could have worked for us, but Lexnet Consulting Group, who demonstrated SageCRM, impressed us. They spoke our language, and really listened to our needs. I believe the business partner is as important as the product, and on that basis, we selected Lexnet and SageCRM."

Zuccolotto reports that Lexnet Consulting Group handled the implementation flawlessly, "They customized the software to fit our requirements. During the implementation we threw a lot of changes at them, but they handled it all," he says.

#### Match Business Processes

Today, SageCRM is used in every department of the company, from sales and marketing to contracts and administration. Remote users across

the country access SageCRM running on the company's colocated server. "We're all working from the same database—and the performance is outstanding," reports Zuccolotto.

Colocating the server eliminates the need for AMZ Financial to retain an internal IT staff. It allows the company to enjoy all the benefits of a hosted solution, while retaining complete control of the database structure, interfaces and integrations, and also providing unfettered access to the entire database for reporting and business intelligence.

Lexnet Consulting Group configured SageCRM to store brokers' commission rates for each of the products they sell. To safeguard the privacy of this information, Lexnet Consulting Group also set up a security matrix within SageCRM that ensures users only have access to the data they need to perform their tasks. Some fields may be hidden from users' view, others can be specified as read-only.

Brokers must be licensed in the states they operate, and AMZ Financial is able to track licensing details including a list of valid states and the expiration dates within SageCRM. The software provides a monthly report which identifies brokers whose licenses are due to expire, and those brokers receive an automated e-mail message also generated from within SageCRM.

#### Interface Web Site

AMZ Financial's comprehensive Web site allows brokers to download forms, generate quotes, and obtain more details about AMZ Financial's offerings. As a broker submits a Web response form, the details are passed to SageCRM, and the appropriate sales representative is immediately notified. "Lexnet designed that interface for us," says Zuccolotto. "The lead appears immediately on our representatives' SageCRM Dashboard so that they can follow up."



AMZ Financial Insurance is able to track its brokers' license renewal dates with SageCRM.

# Leadership. Experience. Net Results.



Lexnet Consulting Group is a leading provider of objective CRM business analysis and implementation services. The company is headquartered in San Francisco California, with additional offices in Los Angeles and Atlanta. Lexnet was founded in 1994 by Steve Chipman in order to provide companies with an expert resource for the evaluation and implementation of customer relationship management solutions.

The Lexnet team has completed more than 200 successful CRM implementations for mid-sized companies and teams within large enterprises. Among the companies that have improved the efficiency of their sales and marketing process with help from Lexnet are Ask Jeeves, Barclays Global Investors, Photon Dynamics, Swinerton Builders and Tarantella. For more information about how Lexnet Consulting Group can help you untangle the complexities of customer relationship management, go to [www.lexnetcg.com](http://www.lexnetcg.com) or email us at [info@lexnetcg.com](mailto:info@lexnetcg.com).



SageCRM provides AMZ Financial with the business intelligence it needs to make strategic sales and marketing decisions.

## Design a Custom Workflow

Lexnet Consulting Group worked with AMZ Financial to design a custom workflow, eliminating manual steps where a lead might potentially become lost or delayed.

The company's contracts department is notified automatically when a sale is closed, allowing staff to review the forms submitted and send a completed contract to the broker. When a new broker is recruited, a custom workflow ensures that the broker receives regular communications from AMZ Financial's management team in the form of a series of e-mail messages customized to the broker and the products he or she will be selling.

"I love technology and the challenge of finding ways to deliver better service than our competitors with fewer staff—and SageCRM helps us do just that," Zuccolotto says.

## Leverage Business Intelligence

SageCRM is providing the management team of AMZ Financial with business intelligence they use to improve processes and procedures. They can monitor how fast contracts are turned around, the overall conversion rates of new leads, and how those conversion rates may vary by office, sales representative, and lead source.

To allow AMZ Financial to maximize its marketing efforts, Lexnet introduced the company to Sage Communicator, a powerful permission-based e-mail marketing tool for SageCRM. Using Sage Communicator, AMZ Financial sends targeted e-mails to groups and monitors the action that is taken with each e-mail. The ability to see who has clicked through to a page on a Web site allows the company to analyze its target audience and helps it tailor future campaigns towards the recipients' specific needs and interests.

Each marketing campaign is analyzed to determine which are the most are effective. "This is extremely valuable to us," notes Zuccolotto. "We're able to calculate the return on investment for each of our marketing efforts, and then make changes as needed to bring the return rate up."

## Make the Right Decision

Zuccolotto says that SageCRM has become a vital part of the company's operations, and he's pleased that it has performed flawlessly with absolutely no downtime. "It's turned into mission critical software for us," he says.

"We made a good decision selecting SageCRM and Lexnet Consulting Group," concludes Zuccolotto. "I highly recommend Lexnet. They know how to get things done."

**Lexnet**  
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