



# Syncsite Underwrites Success for American Strategic Insurance

## CHALLENGE

American Strategic Insurance lacked a central database for tracking contacts and opportunities. Information was stored in spreadsheets and shared via email, leading to a lack of consistency and the opportunity for data loss.

## SOLUTION

ASI selected Infor CRM as its CRM solution and Syncsite as its partner to implement the solution.

## RESULTS

Reps have full access to contact and opportunity data from anywhere, with or without an Internet connection. Management now has visibility into the actions and activities of their staff. Targeted marketing boosts campaign results.



- **Client**  
American Strategic Insurance Corp.
- **Industry**  
Insurance
- **Headquarters**  
St. Petersburg, Florida
- **System**  
Infor CRM™

American Strategic Insurance Corp. (ASI) focuses on providing homeowner and commercial insurance policies to customers in six states. The company is financially strong and has a demonstrated record of paying claims quickly and fairly, consistently receiving a rating of Excellent by the insurance company rating firm of AM Best. ASI is committed to delivering an exceptionally high level of service both to its policyholders and to its network of independent agents. To help ASI meet its commitment, the company turns to Syncsite and Infor CRM solution.

## SEPARATE AND INACCESSIBLE

Until a year ago, the marketing representatives at ASI kept all details of their contacts and opportunities locally in spreadsheets and sent in their weekly notes via e-mail. Deepak Menon, Director of Marketing for ASI, recalls the difficulties the old system presented. "We were unable to transfer and exchange information easily between different representatives or our representatives and management. With each person maintaining their own data, there was little consistency with the information being tracked. We stood to lose vital information if a representative left the company or changed territories."

## CENTRALIZED DATABASE

ASI set out to bring a higher level of efficiency to their marketing operations, and the first step was to implement a robust Customer Relationship Management (CRM) solution. ASI considered other solutions but ultimately decided on Infor CRM and Syncsite. "I had used Infor CRM in a prior position," Menon explains. "I understood its features and inherent customization capabilities. In working with Syncsite, I recognize them to be responsive, skilled and capable." Among the critical elements, Menon says ASI looked for a new solution to allow its marketing representatives to work remotely, even while they were disconnected from the Internet. "Our representatives take their laptops with them everywhere, and with Infor CRM they have full access to their database with or without Internet access. Hosted solutions can't deliver this anytime, anywhere access," he says.

## STREAMLINED IMPLEMENTATION

Menon praises Syncsite's streamlined implementation of the new CRM solution. "We knew what we wanted and Syncsite knew how to make it happen," he says. "They conducted on-site and Internet-based training to bring

# Syncsite Underwrites Success for American Strategic Insurance (continued)

our staff quickly up to speed. It all went very smoothly.” In the future, ASI would like to enlist Syncsite to develop an interface between Infor CRM and ASI’s licensing software. Tying the two applications together will further leverage the company’s technology investment.

## ASI

“Syncsite is a great partner, they help us get the most from our technology investment.” Deepak Menon, Director of Marketing

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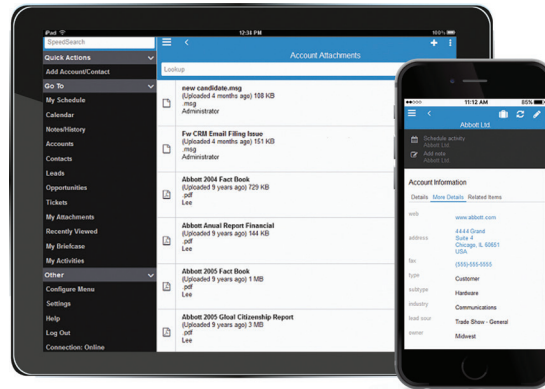
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## ACCOUNTABILITY AND ACCESSIBILITY

Previously, the marketing representatives sent weekly marketing notes to their managers outlining their activities and leads. The managers had no easy way to follow-up and check whether promised activities were pursued. Now, the representatives record the results of every customer interaction in Infor CRM turning it into an invaluable database of corporate information. The reaction from the marketing team at ASI has been overwhelmingly positive. “They are starting to

recognize the value in having a complete history of customer and prospect interaction. They are using the information to generate more opportunities,” Menon says. In addition, through the powerful reports and inquiries within Infor CRM management is able to monitor and measure the productivity of each representative, which Menon says makes everyone more accountable. “Infor CRM serves as the tool for our representatives to track contacts, tasks, and appointments. It also gives management visibility into the representatives’ activities,” Menon says.

## A POWERFUL MARKETING TOOL

ASI communicates frequently with its independent agents and with prospective agents, informing them of new service offerings and industry trends. ASI also is considering using Infor CRM to send targeted, personalized email marketing messages to select groups within its database. “With the ability to target our messages very precisely, we will be able to give our customers more of the information they’re looking for,” explains Menon. “Infor CRM allows us to see the relationships of our clients in a way we were not able to previously. The information helps us tailor our message to better serve each customer, and achieve better results from our campaigns.”

## DELIVERING USEFUL INFORMATION

Under the guidance of Syncsite, ASI also implemented a Business Intelligence (BI) software solution. “Our BI application acts as a bridge between pieces of information that might not otherwise come together,” Menon explains. “It’s a strategic tool we can use to meet our goals by identifying the areas where we excel and conversely by highlighting areas where we need to apply more resources.” He concludes, “Syncsite is a great partner, they help us get the most from our technology investment.”

## About Syncsite

Syncsite is a premier provider of Customer Relationship Management (CRM), Field Service Management (FSM), Business Intelligence (BI) and Marketing Automation (MA) solutions. Syncsite empowers companies in a variety of industries to manage their business data and leverage this information to strengthen customer relationships and enhance profitability.



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