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Prairie Benefits Network Gets Closer to Customers and Prospects with Intuit QuickBase

As a growing insurance brokerage serving small and mid-sized businesses, Prairie Benefits Network needs to stay nimble. So rather than committing time and development resources to customize and maintain an off-the-shelf customer relationship management (CRM) system, Prairie Benefits Network relies on an Intuit QuickBase app that delivers big customer insights and sales efficiency for comparatively little up-front investment.
The Challenge

- Managing customer and prospect data in spreadsheets prevented collaboration and wasted time
- Lack of fast insights into sales opportunities
- Mobile workforce couldn’t access or update customer data from the road

The Solution

- Intuit QuickBase customer relationship management (CRM) app to store and manage customer and prospect data
- Easy forms and fields to track customer and prospect interactions
- Remote access to policy and benefits data for mobile workforce

The Results

- Reduced staff time spent on data management and retrieval
- Increased response times to customer or prospect inquiries
- Improved productivity for agents meeting with clients remotely

Growing with Great Customer Service

Prairie Benefits Network is a benefits brokerage that is growing fast thanks to its commitment to quality service. As a boutique firm, Prairie Benefits Network gives its clients a level of service that mass-market insurance brokers can’t match — offering instant online quotes for individual and small group plans that deliver more for each dollar.

But the company wasn’t getting all it wanted from the customer and prospect data it kept in static spreadsheets. With so much information being collected through quotes and sales, company leaders knew they were missing opportunities to leverage all that data to grow the business.

After hiring a developer to build a custom database that would track agent commissions and payroll information, Prairie Benefits Network still didn’t have an easy way to capture and report on crucial customer information. For example, company leaders wanted to understand sales trends and compare benefit scenarios to better serve customers and increase sales.

“We were missing out on a lot of the data that we were collecting for simple tasks, and the system we were using wasn’t built to provide that,” says Andrew Cole, account manager for Prairie Benefits Network.

A Rapid Build Yields Quick ROI

Already familiar with Intuit QuickBase from his experience as a staffer on the 2008 Obama for America campaign, Cole saw an opportunity to build a CRM that could optimize customer and prospect data. In just two weeks, Cole was able to build an app that could track contracts, commission statements and client data.

The app could track every customer interaction, including the types of products sold, coverage levels, and account status.

With customer and interaction data centralized within the app, agents can quickly see which benefits provide the best utility for their clients and identify opportunities to expand client coverage.

Agents and account managers can also respond to customer inquiries quickly — retrieving information with a few keystrokes to provide timely and accurate information. And because QuickBase is web-based, agents on the road...
can access information from their mobile devices, so they can walk into client meetings fully armed with the latest information.

“Instead of running back to the office to reference an Excel spreadsheet, our brokers can just stop at the nearest place with Wi-Fi and plug in their info and move on to the next meeting,” says Cole.

**How It Pays Off**

Using QuickBase to manage their customer data, Prairie Benefits Network has realized several benefits:

1. **Speed to Insight.** Prairie Benefits Network now spends less time gathering information and has more insight into the complex policy information it needs to service its accounts. Reporting tools make it easy to drill down to provide specific information needed to answer complex benefits questions without a lot of redundancy.

2. **Greater Responsiveness.** Storing interactions and customer data within the app improves broker response time to inquiries and makes it possible for them to customize their service with customers and prospects.

3. **Improved Productivity.** Staff time is saved now that agents and account managers no longer have to manually search through data to find signed contracts, commission statements and other documents.

4. **Access from Anywhere.** QuickBase mobile lets remote brokers spend more time out on the road at client meetings, without having to rely on spreadsheets in the office.

All told, QuickBase has more than paid for itself, says Cole. The entry-level pricing made it easy for the company to afford it now, with the option of being able to scale up in price as their requirements grow over time.

“We needed something that would give us maximum utility for the money. QuickBase is excellent at cataloging information and making it easy to retrieve and analyze, and the pricing is very accessible,” he says.