

## **Assurance Invests in New Methods to Enhance Customer Communication For Immediate Release May 7, 2007**

Assurance Agency based in Schaumburg, IL prominently exclaims “An unwavering commitment to providing outstanding service. Across the board. To every client. At every interaction. For the life of our partnership.” This commitment was readily seen as Assurance sought out new methods to enhance customer communication and feedback.

In January 2006, Assurance was contacted by Active Retention, a specialist in customer intelligence and survey research. “Active Retention said that they would guarantee us a minimum participation rate of 50% and a 300% ROI, return on our project investment. To say the least, we were intrigued”, said Steven Handmaker, Assurance’s Vice President of Marketing and Communications. Assurance decided to move forward with Active Retention’s Client Service Review and surveyed a significant number of their commercial clients.

“The main purpose for these Client Service Reviews was to enable us to better understand how our clients prefer to conduct business, and allow us to turn client expectations into ongoing positive experiences. Assurance was able to achieve an overwhelming 61% response ratio. Considering the time commitment involved in completing each one, this is truly an outstanding response”, said Anthony Chimino, Assurance President and CEO.

Detailed surveys were sent to 314 key decision makers across the wide spectrum of Assurance’s P&C and Employee Benefit clients. A total of 185 surveys were completed for an outstanding 61% response ratio.

Here are a few highlights of the Assurance Project:

- Overall Satisfaction for Assurance commercial and employee benefits teams were put at 96%
- 89% of Assurance clients are either Committed or Very Committed to continuing to work with Assurance
- 82% of Assurance clients demonstrate Exceptional or Favorable Loyalty towards Assurance
- There were 122 different requests for products or services clients had interest in
- 84% of Assurance clients were so happy, they regularly tell others about their positive experiences with Assurance

The Client Service Reviews also identified areas for continued refinement. This was the area which most interested Assurance because detailed and candid feedback like this allowed them to focus on improving best practices to ensure each and every client receives the service and support they require. “The detailed feedback we received in each of these areas provides information that is highly useful. Over the course of the next few months, we will strive to make key adjustments and enhancements to our processes to continually improve and refine our performance in these important areas of service,” said Mr. Chimino.

Active Retention Principal, Alan Blume says, "It is not surprising to see a high quality organization like Assurance receive impressive levels of participation and compelling feedback. Assurance acted upon this feedback very quickly, a great formula to enhance customer service and ensure high levels of customer satisfaction." Active Retention works with all types of business to business organizations to help them gain valuable customer feedback. Their unique Client Service Review methodology is known to elicit detailed and candid feedback, enhancing understanding of the Customer Experience for their respective clients. Advanced tools like Issue & Opportunity Tracking, Issue Reminder Systems and Red, Yellow, Green Status Flags, make it easy for organizations to identify and follow up on both issues and opportunities uncovered during the project. Every client response is color coded as green (positive), yellow (caution) or red (immediate issue). This makes it simple and easy to follow up on client feedback.

Steven Handmaker states, "We expect to make Client Service Reviews an ongoing initiative here at Assurance, it will be exciting to track our progress over time, especially now that we have a roadmap for making improvements in key areas for our clients."

### **About Assurance Agency**

Assurance Agency, Ltd., is among the largest, privately-held insurance brokerage and risk management operations in the Midwest. Ranked among the top 100 brokers in the U.S., Assurance places over \$425 million in premiums annually for commercial and individual clients. Assurance offers expertise in all lines of business and personal insurance, employee benefits programs, bond placement, claims management, safety and human resource consulting. Founded in 1961, the company is headquartered in Schaumburg, IL, where more than 160 employees provide analysis, advice, and service to approximately 4,000 clients. Assurance's website address is [www.assuranceagency.com](http://www.assuranceagency.com). For additional information visit [www.assuranceagency.com](http://www.assuranceagency.com) (847) 797-5700.

### **About Active Retention**

Active Retention pioneered the Client Service Review solution which guarantees survey response rates over 50% and delivers immediately actionable results. Actionable is a key word at Active Retention. Every survey response is reviewed by our expert analysts and our industry leading technology pushes the results to the responsible sales, service and management teams – within 48 hours of receipt. Our predictive surveys uncover key performance insights and hidden cross selling and referral opportunities. We then provide detailed information on the immediate actions which should be taken. Our projects result in dozens or even hundreds of net referral and cross selling opportunities. That is why Active Retention guarantees a 300% ROI on all projects – in writing. For additional information contact Alan Blume: [ablume@activeretention.com](mailto:ablume@activeretention.com), 508-720-3457, or visit [www.activeretention.com](http://www.activeretention.com).