

Client Service Review Solution provides service and sales innovation at TJ Adams

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TJ Adams Group, A Hilb Rogal & Hobbs Company, takes their client commitments very seriously. At the very top of their Web site, TJ Adams proudly proclaims their company values in large bold print: **Innovation – Unwavering Integrity - Commitment to Excellence.** When TJ Adams was approached by Active Retention and presented with an innovative approach to customer intelligence, they were very open to the concept. The Client Service Review solution promised to bring them closer to a better understanding of every client's specific service and sales needs, and TJ Adams was first in line to pilot this new solution.

The results were compelling for both TJ Adams and their clients alike. "Over 50% of our clients said they would be happy to actively work with us and provide referrals within the next 30 days" said Christine Seitz, Manager of Corporate Communications. Of the 462 clients selected, 387 (84%) opted to participate in the Web-based Client Survey. And 82% of this group completed the detailed Web-based surveys. With traditional satisfaction survey responses running around 20-30%, an 82% response says a lot about Active Retention's methodology and TJ Adams commitment to their client community.

"Our clients were extremely candid in their responses, thanks to Active Retention's specific questions and methodology." Seitz said. "Because the information was well organized and distributed to our field service and sales teams, everyone understood exactly what their clientele expected and could begin acting upon the information." Active Retention leverages their Active Email technology to efficiently distribute survey results to the responsible sales person, service person and management. The survey is reviewed by an Active Retention analyst and color coded (Green is an immediate opportunity, yellow is a caution and red is indicative of a client issue which must be addressed immediately).

TJ Adams teams were seeing fields of green. In fact, 30% of their clients identified products and services that they were interested in reviewing within 30 days. And over 50% said they would be happy to provide a referral within 30 days. Referrals are one of the great, hidden opportunities for most companies. Sales people have their hands full, service people are focused on issue resolution. Active Retention principal Alan Blume says, "Our results consistently indicate that organizations do not take advantage of even a fraction of the referral opportunities available to them." Blume continued, "It makes it easy for us to guarantee a 300% ROI on our projects when we consistently find so many referrals and cross selling opportunities throughout our project cycle."

Minor issues were brought to the attention of the service team for handling. There were also a few critical issues pertaining to a handful of clients that required immediate attention. Seitz said, "To ensure superior customer service TJ Adams knows you need to quickly fulfill client expectations. With the actionable information and technology tools provided by the Active Retention Solution, our client service staff was equipped to focus on specific client needs and key retention factors from their desktops."

In 2004, TJ Adams received an award as one of the 25 most innovative agencies in America. In the first-quarter of 2005, the agency was ranked #1 by annual premiums, in the *Business Ledger*. The *Business Ledger* is the Business Newspaper for Suburban Chicago.

TJ Adams Client Service Review Project

Contact Response	Response Percentage	
462	100%	Total Contacts
387	84%	Opted In (said they would participate)
317	82%	Surveys Completed
185	58%	Offered to actively assist with referrals
95	30%	Immediate Cross Selling Opportunities

About Active Retention

Active Retention has developed a Client Service Review solution which yields survey response rates over 50% and guarantees the results will be immediately actionable. Actionable is a key word at Active Retention. Survey results are reviewed by our expert analysts and our industry leading technology pushes the results to the responsible sales and service teams – all within 24 hours of receipt. Our predictive surveys uncover hidden cross selling, referral opportunities and retention risks. We then provide detailed information on the immediate actions which should be taken. Some clients say our results are impressive, but in many cases, they are startling. Many of our projects result in hundreds of net referrals and cross selling opportunities. That is why Active Retention guarantees a 300% ROI on all projects – in writing.

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About TJ Adams

TJ Adams Group is a premier risk management and insurance brokerage firm in Greater Chicago. As of September 1, 2004, TJ Adams joined forces with Hilb Rogal & Hobbs (HRH) Company, the seventh largest broker in the nation. HRH has over 120 offices throughout the nation and like TJ Adams, helps clients manage their risks in property and casualty, employee benefits, professional liability, and other areas of specialized exposure. TJ Adams is proud to deliver the expanded capabilities and value to its clients and remains committed to delivering the same level of quality, customized client service that it's known for in the industry.

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