

CASE STUDY



How Accès Conseil Overcame Scaling Challenges to Maintain Exceptional Client Communication, Reducing workload by nearly 70%

Hours Saved Monthly

364

Annual Cost Reduction

\$100k+



Pathway not only takes away or automates jobs, It's freeing up our team to concentrate on value-adding tasks. We use it to communicate with our clients in an automated fashion based on very specific criteria and emails designed in our brand image." Bob sums it up. "Pathway exposes clients to our brand. It helps our productivity. It helps our follow-ups. It saves money.

— **Bob Mainguy**, Director of marketing, Accès Conseil

AccèsConseil

With a legacy spanning over a century, they stand as trusted brokers, always aligning choices with clients' needs, backed by unmatched expertise and commitment—a go-to for insurance and financial solutions.

Challenges

Client scale and manual processes threaten growth and exposure.

- Maintaining high-quality client communication at scale.
- Time-intensive manual renewal process.
- Additional hiring was financially unfeasible.
- Existing tools lacked the integration necessary for seamless follow-ups, renewals, and billing.

Despite AccèsConseil's culture of innovation, they were being tested by the challenges of scaling without compromising their exceptional client communication. For Bob, their Director of Marketing, achieving more with less isn't just an ideal. It's a daily commitment.

“I am always trying to figure out better solutions and to determine where we can improve processes so that we can improve productivity.” Bob tells us.

Yet, as he recalls, ensuring every single one of AccèsConseil's clients received timely attention was a mammoth task.

“We used to have a process where we'd have to look at all of our renewing policies, and based on specific criteria, we'd send them over to brokers to contact the clients, which was very time-consuming for the renewals team,” Bob explains.

The stakes were monumental. The risk was not just about losing efficiency but jeopardizing the long-built trust. Bob was very aware of the long-term implications for their business growth.

“We were at a point where we had this volume of clients to take care of, renewals would come in, and we wouldn't be able to communicate properly. It's just physically impossible.”

Challenges

Client scale and manual processes threaten growth and exposure.

Hiring was a logical solution, but qualified workers were in short supply. It was clear to Bob that more than just adding to the numbers would be necessary.

“We could never have enough staff”, Bob explains. “There's only so much money you can throw at it where, at one point, it's just not feasible to hire enough people.”

Although tools like Mailchimp were handy for basic email outreach, they lacked integration and comprehensive capabilities regarding follow-ups, renewals, or billing AccèsConseil required.

Bob details. “I could probably extract clients list from Epic, filter them out, manually import them into Mailchimp, create my email, and send it out, which brings all kinds of continuity risks for me. And it would be such a hassle to go through this every day.”

Recognizing the pressing need to streamline operations and ensure consistent client communication, Bob looked for a solution to take the heavy lifting off the team's shoulders.

“We were at a point where we had this volume of clients to take care of, renewals would come in, and we wouldn't be able to communicate properly. It's just physically impossible.” Bob says, “I had to improve the process and help free day-to-day of our brokers so they can service clients and not have to do these low-value tasks.”

Solution

BMS-integrated automation software.

Recognising the challenges, Bob turned to Pathway. Its 2-way integration with Epic was promising transformation and efficiency.

- ✔ Pathway's 2-way integration ensured smooth operations.
- ✔ Segmentation and filtering features enabled tailored communication system to ensure timely communication for renewals, reducing manual intervention.
- ✔ Pathway provided exceptional support during the transition, ensuring a smooth experience.

“Pathway being connected directly to the Epic database was pivotal. When I saw how well it flows, how it writes back to Epic, it was a very straightforward decision for me.”

The harmony between Pathway and Epic was a solution to tracking and storing comms, providing a safety net against oversights.

“Everything is centralised. Any communication I send to a client is attached to their account. I know it's always going to be there.” Bob explains, “If something comes up, and a client says, I don't know about this, I can check and see. And I can even see they actually opened it. So, we're fine.”

For Bob, a generic approach to communication wouldn't suffice. Pathway's segmentation and filtering tools provided the flexibility to personalize at scale.

“It's so simple to segment clients.” Bob says, “We can communicate with our clients in an automated fashion based on very specific criteria and emails designed in our brand image.”

Solution

BMS-integrated automation software.

But the most significant transformation was how Pathway addressed the mammoth task of timely renewals. Bob recounts what it meant for him.

“With Pathway there, I don't have to worry. If a client has a renewal coming up in 60 days, they're getting communication, no matter what.”

The support from Pathway during the transition was unparalleled. Ensuring that Bob was not left to face it alone.

“Another one of the strengths of Pathway for me is responsiveness. Whenever there's been an issue, it's fixed within the day. Very smooth, as far as the working relationship goes, it's really made a big difference.”

With Pathway as part of their arsenal, Bob and AccèsConseil have successfully transitioned from reactive to proactive, ensuring no client feels left out and reinforcing their commitment to innovation and client satisfaction.

"With Pathway there, I don't have to worry. I'll never miss one of my clients accidentally. I'm always on target. If the client has a renewal coming up in 60 days, they're getting communication, no matter what.” Bob continues, “It's writing back to Epic. Any communication you've sent to your client is attached to their account, centralized. ”

Results

Considerable Time and Resources Saved.

Upon integrating the Pathway system, Acces Conseil immediately observed tangible benefits in client engagement.

- ✔ Saved 364 hours monthly, leading to over \$100k in annual cost reductions.
- ✔ The introduction of Pathway led to an 80% email open rate, with a 17% close rate.
- ✔ Regardless of the broker, every client received standardized follow-ups.
- ✔ There was a 70% decrease in workload for renewals, leading to significant workforce savings.

“We started using Pathway with the quote closer, and the results were interesting. We'd get an 80% open rate and a 17% close rate.” Bob continues, “Even for potential clients that don't close. They've been exposed to the AccesConseil brand, which was a big plus for me.”

Standardization, an often-overlooked aspect of client communication, was also notably enhanced.

“Some brokers are very good at following up, and some brokers are not so good. With Pathway, everybody gets the same follow-up, making it better. It standardized follow-ups”

One of the most transformative uses of the Pathway system was in policy renewals.

“We've been using it for renewals for all our auto policies, home policies, and on the commercial lines for very small businesses. All of those clients are part of the automated renewal process.”

Results

Considerable Time and Resources Saved.

There's been a drastic 70% reduction in workload for the renewals team. For AccesConseil, that means their brokers can concentrate on clients who want or need to be called. A big change in their process.

“I had a minimum of 3 full-time people doing renewals. And now, that could just be one person, and it would be fine.” Bob says, “ We’re saving money, and people can now concentrate on adding value to the company.”

In addition to these regular operations, the system's agility was evident in emergencies.

“I can get in the morning. There's been a flood. We have quite a few clients in that area. Make a segment. By lunch, an email has been sent.”

The introduction of Pathway into Acces Conseil's operations has not only streamlined processes but also enhanced client engagement, optimized resource allocation, and added significant value to the company's bottom line.

"Pathway not only automates jobs, It frees our team to concentrate on adding value for the company. ” Bob sums it up. ”Pathway exposes clients to our brand. It helps our productivity. It helps our follow-ups. It saves us money.”

**Want to transform your processes to handle
client communications at scale?**

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