

ASTONISH RESULTS' FEBRUARY e-MARKETING AGENCY OF THE MONTH

*"You need to have a plan and then follow it. Everything in the plan should have a purpose, a purpose that allows you to monitor and measure your return on investment."*

*—Tony Alessandra  
President  
Insurance Solutions*

# HIGH TECH, HIGH TOUCH

*Marketing success calls for plan and purpose, not "spray and pray"*



*The Insurance Solutions Team.*

By Dave Willis

In the 1980s Tony Alessandra's dad, an agency principal, took him to Europe on a sales incentive trip hosted by prominent Midwestern carrier. "I remember sitting in a room with producers from all over the country, from some really small towns," he says. "I thought to myself, 'If they can win a trip to Europe, heck, I'm from Southern Orange County California. It's a high-density area. This is a no-brainer. I can do this!'"

He shared these aspirations with his dad who "fought it tooth and nail, kicking and screaming," says Alessandra, president of Mission Viejo, California-based Insurance Solutions. "He said, 'If you want to get into the business, it's commission only. Figure out how to work this computer and do quotes.'" So he did, selling insurance by day and working in the restaurant business at night. "I was working 18 hours a day," he explains. Before long, he abandoned

the restaurant world and spent days selling and evenings marketing.

Since then, Alessandra learned a lot—about the business, customers, marketing and, eventually, agency ownership when he took over the reins from his dad. Today, the agency boasts well over 11,000 clients. The agency mix is about 50% commercial lines, 40% personal and 10% benefits.

To help maintain a strong customer base, Alessandra, who holds the CIC and CWCA professional designations, has used electronic tools—primarily electronic newsletters and focused e-mail blasts—to communicate with clients. Over time, he became a student of advanced e-marketing, launched a modest Web presence, and explored ways to build traffic and generate more leads.

#### **What matters**

But his quest for learning and implementing an integrated electronic marketing strategy became nearly all-consuming. "I ended up throwing my arms up, with all of the



*Insurance Solutions Technology Group consists of (from left) Bryan Kilduff; Tony Alessandra; Steve Aylor and Sonia Aguirre.*

different ideas and acronyms—CRM, SEO, SEM, PPC,” he recalls. A big part of his frustration was the fragmented or silo-like nature of the e-marketing systems he explored.

“I felt overwhelmed,” Alessandra says. One thing he knew was he didn’t want to become an electronic marketing guru. His strengths, he says, are in “helping people solve their insurance-related problems, addressing fatal coverage gaps, and protecting clients, not mastering the latest technology.”

These strengths play into the agency’s rich tradition of personal service. “Our culture is all about giving and serving,” he explains. That goes beyond insurance and includes helping charities and neighbors in need. At Christmas, for instance, the entire Insurance Solutions team helped a family whose dad couldn’t get out of bed to decorate their home because he was suffering from cancer.

“We strive to do everything as a team,” Alessandra adds, “so we hung

lights on their house and put up festive decorations. We had a great time together and with the family. We’re in the service industry, but when the rubber meets the road, serving other people means getting in the trenches and standing by them in their time of greatest need.”

At first blush, it might seem that a desire to build a strong electronic marketing presence and a need to engage personally might be tough to meld. Alessandra found the exact opposite to be true when he tapped Astonish Results, a digital marketing and training firm, to help bolster agency marketing.

### **Clear goals**

“I knew I needed a system to help me talk to my clients, because I couldn’t personally talk to that many every single month,” he says. He found help for that in Astonish Results’ Virtual Profit Center customer relationship management

system. “That lets us nurture and talk to clients, even cross-sell,” Alessandra continues. “It allows us to touch every one of our clients as we—and they—want.”

Business development was another e-marketing goal. “We have done a lot to formulate our brand and build our agency based on referrals,” he explains, “but we needed to evolve. The next generation is moving to the Internet and we need to be proactively building our Web presence.” Astonish Results helped the agency revamp its Web site and implement clear processes to respond to increased traffic.

The agency tapped the e-marketing firm’s assistance in developing a series of flash e-mail presentations for prospects. “Their multimedia marketing capabilities were a perfect fit to our agency’s existing plans and search engine optimization strategies,” says Steve Aylor, Insurance Solutions’ internal SEO and marketing specialist.



*Above: The Commercial Service Team. (from left) Theresa Contreras; Brittany Kelly; Cheryl Jafar and Teresa Cruz*

*At right: The Personal Lines Service Team. (from left) Doloras Thurman; Brian Schnurle and Kathy Williams*



Finally, Alessandra wanted to be sure whatever path he followed would allow the agency to maintain its human side—its focus on serving and caring for people. “I lead with my heart,” he points out, “and that serves our organization and our clients well.”

To highlight this focus, he shared his vision and perspective with Astonish, which built and incorporated a Caring Corner right on the home page of revamped Web site. The feature links directly to Web sites for Boys Town and Sharing Our Strength, two non-profit organizations the agency supports.

### **Leverage for success**

Alessandra says his relationship with Astonish and the agency’s use of its system has allowed him to leverage available technology to build his business. “The most visible element, of course, is a dramatically increased level of professionalism that our new Web presence represents,” he says. “This works to instill a greater level of confidence among prospects and clients.”

Related e-marketing features have increased activity on agency site, as well. Since signing on with Astonish

in May 2009, Alessandra says traffic to the site “has exploded.” But new business leads are just part of the story. More important, he says, is new found success in delivering consistent, solid client counsel.

“We still have a great deal of new business coming in through traditional, referral-based relationships we’ve established over the last 42 years,” Alessandra explains. “That continues to work like clockwork.”

“Upon implementation of the entire Astonish system, we discovered additional tools, features, and benefits,” Alessandra adds. Key

among these is a mechanism to monitor producer and service teams, telephone interactions with clients and prospects.

### Consistent delivery

Implementing this feature was, as Alessandra says, “extremely humbling. I thought I had a well-oiled organization. But as much as we want people to do things a consistent fashion, their interpretation of our expectations often differ.” By listening to calls, management was able to identify staff strengths, weaknesses and more importantly, work to achieve consistency.

“Now, thanks to Astonish, we have a sales track our team can run on when they take these inbound calls,” he says, and critiquing is done as a group. “We’re all in the room, sitting together, and we listen to someone’s call and all give feedback—what we liked and what could be improved. The outcome has been quite positive.”

Marketing-related topics make up a sizeable portion of the feedback sessions. “They’ll comment when co-workers forget to ask for e-mail addresses, date of birth, any pertinent information we need to help in our e-marketing efforts,” Alessandra points out. “Instead of management leading with a sledgehammer, we’re now sitting at a round table as a team, and nobody knows who’s going to be on the hot seat next.”

This approach accelerated employee buy-in and has dramatically



*Insurance Solutions Sales Team.*

enhanced peoples’ ability to close more business. “Now they’re following the track, because we’re working on their calls together,” Alessandra explains. “That was a mission critical gem within the system. It’s something I’m ecstatic about.”

### Parting advice

While he admits e-marketing and its various elements can be overwhelming, Alessandra has found success—in managing the myriad tools and in achieving results. Key, he says, is to have a strategy. “You need to have a plan and then follow it,” he says.

“Everything in the plan should have a purpose, a purpose that allows you to monitor and measure your return on investment,” Alessandra adds. “That’s true for every element—the e-blasts, client nurturing, prospecting, whatever. Everything we do is monitored and tracked. That is probably the most critical aspect.

“You can’t just go out there and spray and pray,” Alessandra concludes. ■

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*The Insurance Solutions Team decorated a cancer patient’s home for Christmas..*

