

Kestler Financial Group's Commitment to Technology Enables Superior Service and 52% Annual Growth



Working with Resolv, Kestler Financial Group has taken their Sage SalesLogix implementation to the next level. Automated processes, immediate access to data and trend analysis has enabled significant growth and outstanding customer service.



Since 1997, innovation, technology and commitment to customer service have set Kestler Financial Group (KFG) apart from its competitors. Specializing in life insurance, annuities, long-term care and securities, KFG is known as a knowledgeable and experienced resource for independent financial agents seeking the best products in these fields. Due to the highly regulated nature of their business and no opportunity to compete on price, KFG differentiates themselves with the service they provide. KFG, an Insurance Marketing Organization (IMO), supports 7,000 financial professionals across the country by serving as their back-office support along with providing new ideas for prospecting and ways to use technology to maximize efficiency. KFG provides a tailored product choice for the end customer, all backed by the superior customer service KFG is known for.

Initially, KFG used Sage ACT! to house basic contact information such as name, address and notes; and a combination

of spreadsheets and word processing documents to create reports and invoices. Over time, KFG became entrenched in ACT! and hired a full-time ACT! administrator to maintain and build on the database. KFG continued to grow and use ACT! to its fullest capacity. "We got to a point in our business where we needed to find something more powerful," said Jason Kestler, president and CEO of KFG.

KFG selected Sage SalesLogix and worked with a local firm for the data conversion and implementation. "It quickly became evident that we did not select the right company to help with the transition," said Jason. "We were used to being creative with our CRM system and this company wanted us to work with Sage SalesLogix out of the box. They also did not invest the time to learn our business and what we had hoped to get out of Sage SalesLogix."

Since KFG had success with an in-house CRM consultant with the ACT! system, they

decided to hire a full-time Sage SalesLogix consultant who would be responsible for maintaining the database, supporting the users and tailoring the system to enhance KFG's internal work processes. Wanting to ensure the right person for the position, Jason started reaching out to find someone who could help him. "We needed someone who had a great balance of technical skills and business acumen," said Jason. "Over and over, I kept hearing that we had to talk to Resolv."

"Our first project with Resolv was for them to help us hire someone who would be able to take our average implementation and turn it into a rocket ship," said Jason. "The process worked out great. Resolv handled all of the technical interviews for us and we made a great hire who is still with us today." Having someone internal propelled KFG's implementation forward and KFG experienced continued growth.

Over the course of a few years, KFG's database grew to over a half million records all with hundreds of pieces of data. This began to slow down the system tremendously. "Our marketers need to be on the phone helping our customers," said Jason. "The database was slowing them down and taking an unacceptable amount of time to access information. We engaged Resolv to help us. They put together a phased plan along with some benchmark measurements to be sure we are on target. Resolv exceeded every expectation we had. After just a few days, the speed of our database improved dramatically. It was taking 30 seconds to pull up a record before Resolv helped. Now, the information is there as fast as we can type it. This enabled our marketers to increase their calls per day from 60 to 100 plus. The more time we can spend on the phone talking

"Our business is based on relationships and Sage SalesLogix is the foundation. We have access to an enormous amount of data that allows us to provide an outstanding experience for our customers. Resolv has been instrumental in getting us where we are today."

**–Jason Kestler, President and CEO
Kestler Financial Group**



KESTLER
financial group
Welcome Home

Improvements Achieved

- Near instant access to over a half million records
- Increased number of calls made per marketer per day from 60 to 100
- Tailored interfaces for different groups
- Automated marketing call lists ensures nothing is overlooked
- Financial decisions made with current data
- Easily identify and react to trends
- Able to attract highest quality agents

instead of waiting for data to appear, the better customer service experience we are providing and the more opportunities we are creating."

Now that the speed issue was taken care of, KFG saw the possibility of using Sage SalesLogix not just as a place to store data, but as a sales tool. "We again turned to Resolv to help us take our implementation to the next level," said Jason. "To fully understand how we use the system internally, Resolv came in and sat with our day-to-day users and just watched and documented how they worked. Resolv came back with a plan to make the system easier to use by minimizing the keystrokes with short-cut keys and rearranging fields. We now can focus more on the call as opposed to where we can find the next bit of data. Our team was super excited about our streamlined system."

The next phase was to look at the implementation and design various interfaces based on the different departments at KFG – marketing, administration and internal auditors. "Each group needs to see different types of data," said Jason. "Previously, we were all working from the same interface. Resolv designed different interfaces for each group, which again gave tremendous boosts to productivity and happiness with Sage SalesLogix. The relevant data for each group is quickly accessible."

With their Sage SalesLogix system running smoothly and giving everyone access to the data they need at their fingertips, KFG could start building processes and reports to further improve effectiveness and customer service. "Our marketers came up with the idea that it would be helpful to have a database generated list of calls to ensure no one is overlooked," said Jason. "Working with Resolv, we came up with a list of reasons we would call our customers. Sage SalesLogix now generates a daily list of calls. This allows us to keep in front of our customers and has completely automated the process." At the end of a call, there is

workflow built in to provide any follow up information as a result of the call along with scheduling future calls.

KFG now has access to sales reports such as new business, pipeline and open opportunities. "Prior to having everything in one system, we would be making financial decisions on data that was 30-days old," said Jason. "Now we see everything immediately. Everyone knows the pulse of the company. We can identify trends and react to it much faster." One such trend KFG group identified required the need for some part-time help to get data entered before an interest rate expired. KFG was ready to go and had all of their contracts entered in time, where some competitors were caught without help and their customers lost out.

"We strive to be the company of choice for top agents," said Jason. "One way we attract top people is with a high accuracy rating. An accuracy rating measures how easily products are processed with different carriers. The industry average rating is 38%; our rating is 98.7%."

KFG takes advantage of Resolv's monthly support plan. When a larger project comes up, KFG turns to Resolv for help. "What I like about Resolv's method is that they are so incredibly detailed in their statement of work. We know exactly what we are going to get. They go through a process of helping us understand what the value of doing the project is and what the end result needs to be. If the value is less than the price, they advise us to not do it. They clearly work in our best interest and have earned an enormous amount of our trust."

"We don't drop the ball. We don't forget about people. Sage SalesLogix makes us who we are. There is no way we could have grown our company the last year by 52% without investing in the system and our relationship with Resolv," said Jason.



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