



Independent Insurance Agents of Texas

CASE STUDY

Customer Details

The Independent Insurance Agents of Texas (IIAT) is a trusted resource for independent insurance agents in the state of Texas. The organization is committed to helping independent insurance agents succeed by providing quality educational courses, technical and management resources and newsletters that keep agents informed of the latest industry news and events, and access to competitive markets through IIAT Advantage.

Industry

Trade Association

Avolin Solution

GoMembers

Challenges

- Outdated system
- Lengthy payment process

Key Benefits

- Improved response to member requests
- Online access to Continuing Education transcripts
- Automatic payments
- Elimination of lockbox and associated fees

The Independent Insurance Agents of Texas (IIAT) is the nation's largest state association of Trusted Choice® agencies, representing approximately 1,700 agencies and more than 16,000 agents and insurance professionals. IIAT members are advocates for insurance consumers by helping them comparison shop for cost-effective and customized coverage. IIAT is also affiliated with the Independent Insurance Agents & Brokers of America and works with legislative, regulatory and judicial bodies in Texas on behalf of independent insurance agents across the state. IIAT has 30 employees at its headquarters in Austin, TX and 12 in its second location in Dallas, TX, who manage a variety of responsibilities, including membership, events, various insurance programs and educational resources.

Recognizing the Challenges

IIAT had been operating on an older version of the GoMembers solution since 2000. The organization recognized the need to update their systems and provide their members with a more enriched environment for their web access. Use of a lockbox at a local bank to receive and deposit checks cost the organization several hundred dollars each month, and cash flow was inconsistent as they waited on checks to be mailed. They required integration with Microsoft Dynamics GP in order to move away from data exports for accounting reports.

Identifying the Solution

After researching various software options, the search team decided to upgrade to the current version of GoMembers. Improved email extraction for marketing purposes was one benefit of the updated version. The Document Manager allows IIAT to attach documents and spreadsheets to a member record. Members can access their profiles to not only update their information, but also to view and print their enrollment application and transcripts. The GoMembers toolkit allows IIAT to update queries and modify forms based on their needs.

Realizing the Benefits

After upgrading to the newer version of GoMembers Enterprise, IIAT has been able to simplify their payment process, making it easier than ever for members to pay dues and meeting registration fees. Members no longer need to worry about remembering to pay for their membership as a specialized process within the system will charge a member's card based on their desired payment plan, such as monthly or quarterly. GoMembers has also increased the security of its members' credit card information as a result of the integration with PayPal, which redirects credit card transactions to the secure PayPal server. IIAT has achieved its goal of no longer having to pay expensive lockbox fees at their local bank as the software manages the transactions more efficiently.

IIAT has improved other processes as a result of the GoMember upgrade. Licensed insurance professionals in Texas have a Continuing Education(CE) requirement. IIAT maintains an online CE transcript linked to members' records. As insurance agents complete their annual license renewal, they can pull their transcript from the IIAT website, rather than going through paper files. Another example can be seen with the Texas Department of Insurance (TDI) requirements for CE sign-in sheets. Previously, agents who had not received their CE certification would ask IIAT weeks after the class to follow up. IIAT would then have to go through a lengthy process to determine why a CE certificate was not issued. Now, the first place customer service representatives look is GoMembers, where a copy of the sign-in sheet is attached to each meeting record.

IIAT is looking forward to additional enhancements to their system. The Directory+ feature provides expanded search criteria and geographic search results that will allow visitors to locate members within their specified area. IIAT is always looking for ways to improve their processes, and more staff members are cross-trained on GoMembers so they can deliver superior customer service.

If you would like to learn more about GoMembers, email us at info@avolin.com or visit www.avolin.com.

The Avolin logo features the word "Avolin" in a bold, sans-serif font. The letter "A" is black, while the "v" and "i" are purple, and the "n" is black.

Avolin provides critical software solutions to enterprises around the world, specializing in Customer Relationship Management, Knowledge Management, IT Support and Supply Chain Management. Over 1,400 customers in more than 50 countries use our portfolio of solutions to help them provide outstanding customer service, keep their day-to-day operations running smoothly and make intelligent decisions based on relevant and real-time data. Our customers are at the center of everything we do and our singular goal is to deliver the right solutions for their industry-specific workflows helping to keep them at the forefront of their industries. For more information, visit www.avolin.com.