

Case Study

Southern Insurance



Southern Insurance is located in Blakely Georgia, a town roughly 80 miles northwest of Tallahassee, Florida. Personal customer service is a cornerstone of the business, which offers several different lines of coverage, from life and health to farm and commercial. With 2,000 - 3,000 clients, the office specializes in tailored, thoughtful insurance policies for its budget-conscious, unique parties.

Challenge: Staying in touch, staying ahead of the tech curve

Southern Insurance relied on an antiquated PBX system with just three lines and no rollover feature, allowing for some queries to go unanswered. It was, in the words of policy writer, bookkeeper and de facto IT manager Megan Odom, “a dinosaur.”

“Transferring a call was difficult. If you didn’t watch what you were doing you’d hit the wrong button. You couldn’t forward calls to your cellphone. Nothing was digital. It was strictly buttons,” she says.

Additionally, voicemail accounts were passcode protected but not easily reset. If passcodes were lost, forgotten or not divulged before staff left their positions permanently, voice mailboxes were inaccessible. Voicemails went unanswered and setting up new greetings and accounts required an appointment with an outside tech. And, without a presence (or “line-in-use”) feature, colleague interruptions were frequent since there was no way to determine someone’s status without walking into their office.

One final challenge — though separate businesses, Southern Insurance shared space and resources with Land and Lake Sales, Inc., a local real estate company any communications upgrade would have to support the needs of both businesses.

“In 2019, Southern Insurance staked a budget line item on a voice communications upgrade. The question was, what solution was right for their business, and could they afford it?”

Customer at a glance

Industry

Insurance

Customer Description

Southern Insurance

Challenges

- Antiquated phone system
- Passcode reset for voicemail
- No line-in-use function
- Shared space and resources

Solutions

- OfficeSuite UC®
- Plug-and-play desktop handsets

Results

- Accelerated mobility, collaboration and control
- Cost-efficiency
- Competitive edge



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The Solution: Kinetic Business OfficeSuite UC®

Odom's tech-savvy acquaintance put her in touch with an IT and telephony expert who quoted her an entry price point that was cost prohibitive. "I had to sit down," she said. To the expert's credit, he advised her to speak to an acquaintance of his who works in an insurance office that had just invested in a new business voice solution, OfficeSuite UC® from Kinetic Business by Windstream.

"So I called her, and she said, 'It's awesome. You won't be sorry,'" recalls Odom.

Southern Insurance's new OfficeSuite UC® solution begins with an intuitive online user and admin panel — accessible from any desktop or mobile device — that Odom and her colleagues use to customize and control individual call routing and feature settings. Their new desktop handsets are completely plug-and-play, and all voice messages and call settings are saved in the cloud. Presence and availability features indicate the current status of coworkers — in a meeting, on a call or out of the office — and the instant messaging application allows them to communicate with one another in a non-disruptive manner.

"You can communicate back and forth with your coworkers and not even have to leave your desk. It's funny, before this, we were actually searching for a program we could purchase to do just that. Because when someone's on the phone and all you need to say is, 'Hey, a client is here to sign this document,' a quick office chat feature means you don't have to get up and walk across the office just to stand and wait while they're talking on the phone."

The staff's favorite feature — call "twinning" — simultaneously rings both the office handsets, as well as their personal mobile phones. This allows clients who call the business line to receive a warm human voice answering their questions and meeting their needs, even if the Southern agent isn't physically present in the office. And the co-located real estate agents from Land and Lakes Sales "absolutely love it," she adds. "The

fact that the phone rings direct to their cellphones and they don't miss an opportunity to sell a house or show a property is great."

Southern Insurance's new unified communications solution has accelerated their mobility, collaboration and control. The solution runs over the top of their 50 Mbps connection. The installation process was smooth, and the platform actually saves the company money over legacy technologies they had employed previously.

"We have to inspect buildings and properties in the field. The phones, the way they're set up, my cellphone rings when my office phone does, so whether I'm here or not I can still take care of my clients." — Megan Odom, Southern Insurance

The FUTURE is in their hands

For Megan Odom, OfficeSuite UC® from Kinetic Business by Windstream means she can do her job in two places at once.

For Southern Insurance, it means competing against the big national agencies by using technology that increases the availability and responsiveness of its greatest asset — Odom and her associates.

Competition at the local agency level is about human connection, fine-tuning coverages based on a sales discovery process. Whether it's hustling to meet a client in the field or calling them with an alternate coverage or payment plan, customers pick Southern for its superior customer service.

"You know, we have to inspect buildings and properties in the field. The phones, the way they're set up, my cellphone rings when my office phone does, so whether I'm here or not I can still take care of my clients," she said.

OfficeSuite UC® is a Swiss Army answer to the question of how to improve customer service in a small business.



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