

Real-world agency results

Fisher-Greene Drives Growth, Deepens Customer Relationships with Veruna



Fisher • Greene
INSURANCE AGENCY

KEYSTONE

Nearly 100 years after the JE Fisher Insurance Agency opened, the company merged with another longstanding North Carolina business, Greene Insurance Agency, to form Fisher-Greene in 2012. The two family-owned, community-focused, Keystone Group agencies both offered P&C insurance for personal and business customers, and joining forces seemed a sound strategy to support growth and success in an increasingly competitive marketplace.

Business Snapshot

Headquarters: China Grove, NC

Locations: 4

Founded: 1914

Focus: Commercial and personal insurance lines, employee benefits

Challenge

Following the merger, each office maintained a separate legacy AMS. The limited technology and disparate systems created ongoing challenges, but absent any better options, the combined firm made do as well as possible.

"They were just outdated," said Karen Greene, co-owner. "The servers and screens were old, not very user-friendly, not using current methods and technology."

An even bigger concern than the systems' technical limitations were the poor customer service and support Fisher-Greene received.

"They would give you 45 minutes a month," she said. "If you used up your 45 minutes, they didn't care if you called. You were just a number in line, and they would charge you every time."

Solution

When Greene saw an early presentation by Veruna at a Keystone Group event, she was immediately excited by the potential of the new company's innovative approach to technology.

"It just looked user-friendly," she said, "seeing the difference in screens and hearing what the capabilities would be—and I loved the fact that Veruna is built on Salesforce."

Not ready to make the leap at that early stage, she kept an eye on Veruna for a few years. After a 2018 acquisition that expanded Fisher-Greene to three locations, the drawbacks of legacy systems became too limiting for a company focused on growth. Greene knew the time was right to move to Veruna.



Business Impact

With Veruna in place, Fisher-Greene was finally able to operate as a unified business across multiple locations, even as they acquired another agency and expanded to four offices.

"We can all see each other," Greene said. "We're doing everything on the same page. I can see what the book of business is for each producer, for the agency."

Real-time dashboards give everyone access to accurate, up-to-date information without having to manually pull data from different systems or run reports. Comprehensive policy downloads have also saved the agency significant time and effort while reducing the risk of error from manual entry.

Veruna's customer service has been a consistent bright spot for Fisher-Greene as well.

*"They have **proven that they're going to be there for us.** I cannot say enough about how great those people are."*

Karen Greene,
Co-owner
Fisher-Greene Insurance Agency

"They have proven they're going to be there for us," Greene said. "I cannot say enough about how great those people are."

Veruna has also enabled the agency to provide exceptional service and strengthen relationships with their own customers.

With powerful customization and real-time information, Greene said, "we can sound like we know our customers' accounts because it's all right in front of us. When you've got those details accessible it makes that relationship better."

Does your AMS have the flexibility and innovation to deliver ideal experiences for today's consumers—and producers—while supporting agency growth and profitability? If not, you should look into Veruna today!

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