



Tracking Prospective Customers and Keeping Them - An Attorneys' Title Guaranty Fund, Inc. Case Study

How PhaseWare gave this title insurance company the ideal solution to gain clients and manage these relationships.

Business Environment:

Attorneys' Title Guaranty Fund, Inc. (ATG®) provides title insurance to homebuyers and lenders through a network of 3,000-4,000 lawyer members and an expert staff in Illinois and Wisconsin. As a privately held, member-owned organization, their attorneys offer related services and revenue opportunities for lawyer members through subsidiary companies. ATG has a solid track record of success and a financial stability rating of "A Prime Unsurpassed" from independent ratings bureau, Demotech.

The Challenge:

ATG had a two-fold challenge. They needed a customer support mechanism to track incoming calls and emails, but they also needed a way to track a customer from the sales prospect phase all the way to a full customer support phase. Many departments within ATG needed to use the same application so that data was shared within the company. Before PhaseWare, ATG was handling their data manually. This meant there was no easy way to share information or build a solutions database. With everyone doing their "own thing", there was no centralized place for management to gauge what was happening with sales progress.

PhaseWare's Solution:

With PhaseWare's **Tracker** and **Event Engine** products, ATG has found one dynamic tool that brought the whole company together. **The entire staff at ATG uses Tracker**, including IT and Sales. They discovered that PhaseWare solved many more issues than they realized they had. Here are just a few of the solutions PhaseWare has provided for ATG:

Solution #1: Easy to install and use

At ATG, it was critical that the product they chose was easy to install, easy to be trained on, and easy to use. If it was too cumbersome, employees wouldn't use it nor maintain it. ATG was up and running within one month – including training.

Solution #2: Ability to use Tracker as an SFA

The ATG Sales Department saw immediate benefits because they use Tracker as a Sales Force Automation System (SFA) by setting up perspective customers and tracking their progress. Once they become a customer, they can track any problems they have. Now this data can be shared throughout the company and Management can easily see the history of a particular customer.

Bob Blessman, the CIO at ATG says, "We don't use PhaseWare on a transaction basis – more to manage the relationship. We wouldn't enter into PhaseWare that a certain customer on a certain transaction had something happen. We would put in something about the member complaining or sending a thank you note – more on the relationship level than transaction level."

Solution #3: Ability to use Tracker as a "Solutions Database"

Bob also says, "One of the big things is once you have a known solution, (we were) not being able to share that solution. This resulted in each person having to independently solve the same issue on their own. PhaseWare gives us a good tool to handle this. Everything we did before regarding maintenance about / capturing customer information like email etc., was manually tracked/kept. **With PhaseWare, the members can enter this information and this makes everyone happier!**" Bob also adds, "Our service is much better. Not losing calls. Can give people with less technical knowledge easy access to known solutions so they're able to handle the issue and close the call."

Solution #4: Ability to track frequency of problems and their impact

Before PhaseWare, ATG had no way of knowing if minor problems were occurring more frequently or just with certain people. Bob Blessman says, "With PhaseWare, we can track this. It's very helpful! As a result, we've eliminated some problems that we hadn't thought were very significant, but with PhaseWare, we found out they were happening a lot more than we had thought."

Solution #5: Ability to be alerted for immediate action

PhaseWare's Event Engine has been a great tool for ATG. People get immediate emails when they need to be aware of something, need to follow-up, or when an incident is closed. Bob states, "It saves a lot of time from manually having to call people. It's a fast, easy way to reach a lot of people all at once." ATG members are all over the place and sometimes have clients with them, so it has been very efficient to contact others via the Event Engine's email function. Bob adds, "People are notified and they indicate when (an issue is) complete. A sales rep or manager can easily and quickly verify that what needs to happen is getting done. **This saves a lot of time and enables us to do a much better job!**"