

### PROFILE

Insurance Company #1 is an Illinois-based insurance, banking and related financial services business, providing commercial and personal insurance and financial services to customers in 40 states.

#### CUSTOMER CHALLENGES

- Registered 2500- 3000 agents several times per year
- All processes entirely manual
- Needed a cost-effective, easy to use, online registration solution

#### SOLUTION

InVision Data helped Insurance Company #1 go online with their agent and newsletter services very quickly, getting them started with templates, program and housing features that make recurring registration and marketing events easy to replicate. Building a new registration and marketing site for agents and their clients is now as simple for their agents as swapping out a logo on a registration form.

#### BUSINESS RESULTS

- Insurance Company #1 is able to organize online registration approach
- Convenient, self-service software application
- Powerful & sophisticated functionality

“Technology right now is really putting everything into the palm of meeting planner’s and agent’s hands. Our agents are so much more accustomed to doing everything online in terms of registering than to do it via paper. We did a lot of research when we were trying to decide on a provider. InVision just offers exactly what we were looking for...it is very user friendly.”

*-Director of Advertising & Marketing Media*

In 2003, Insurance Company #1 was looking for a cost-effective, easy-to-use technology solution to tackle online registration for the 2500 – 3000 agents that they register several times per year. Up to that point, their registration and marketing process was entirely manual. They needed an online registration application that would allow them to get started quickly and streamline their registration process.

Insurance Company #1 compared many online registration applications, but InVision Data stood out because of its ease of use and ability to automate the entire registration experience. “We were going from not using any kind of online products to initiating this product with our agents, and we just wanted something very user friendly. Registrants receive an automatic confirmation. That was a big part of our decision as well. We don’t have to do a lot of the steps that we did before. It’s all automatic,” says the Director of Advertising & Marketing Media.

InVision Data helped Insurance Company #1 go online with their registration very quickly, getting them started with templates, program and housing features that make recurring events easy to replicate. Building a new registration site for specific events is now as simple for their agents as swapping out a logo on a registration form. With InVision Data, Insurance Company #1 has been able to organize their online registration approach through the convenience of a self-service software application that brings very powerful and sophisticated functionality.