

Conner Strong uses SingleVision to insure marketing success

BDS SingleVision®
CASE STUDY

Coordination of separate data sources helps this national insurance brokerage reach their goals

Conner Strong is a leading provider of property and casualty insurance and employee benefits products and services. Through proprietary approaches, the firm offers customized programs designed to align with organizational goals and drive bottom line growth.

Founded in 1959, Conner Strong is headquartered in Cherry Hill, New Jersey. The privately held firm ranks as the 31st largest insurance brokerage and 18th largest privately owned insurance broker in the country. Each year, Conner Strong places more than \$1 billion in premium volume and has a team of nearly 400 insurance professionals, serving clients throughout the United States and abroad.



New Marketing Plan Targets Business Growth

Conner Strong wanted to focus their resources and grow their business through a coordinated marketing and sales effort. They needed to develop methodologies to systematically reach their target markets, determine qualified prospects for proactive marketing actions, and expand their relationship with existing clients. They also wanted to capitalize on marketing programs offered by their insurance company partners.

Multiple Data Sources Challenge Marketing Efficiency

Data, of course, was a key component of the marketing plan. To accomplish their goals, Conner Strong had to draw data from five separately maintained databases — typically referred to as data silos.

1. CRM system - field sales contact data and activity
2. Agency management system - insurance client data
3. Benefits management system - benefits client data
4. External compiled insurance data - publicly available worker's compensation information
5. External compiled business data – general business contact and demographic information

Conner Strong was determined to harness their data by coordinating the five data silos. In order to get the full value out of each silo's data, they needed to correlate all data for systematic analysis and action, creating the data challenge.

- Data in the separate silos was stored in different formats
- There was significant overlap in data between and among the sources
- The company did not want to move all the data to a new ERP system

SingleVision Breaks Down Data Silo Walls

In order to deal with their data issues, Conner Strong engaged Business Development Solutions (BDS) to implement the BDS customer data integration software application, SingleVision®.

SingleVision matches and links contact and address records from separate silos and within each data silo. The match engine is guided by a set of adjustable rules to identify same location and contact records as well as related organization records. SingleVision assigns Common IDs to correlate the matched data within their corporate hierarchy levels. The matching and linking is an on-going process that continually correlates data as new records are added and changes are made to existing records in the separate data silos.

Data Coordination Delivers Marketing Advantages

Conner Strong now has a coordinated single customer view for analysis and action. They can analyze their book of business. They can evaluate the concentration of the types of businesses that they serve and evaluate emerging specialties.

In the SingleVision Record Viewer, representatives can see all of the authorized information about any account — regardless of the original data source. Marketing and other corporate units can now query across multiple data silos in order to perform analysis, generate lists for campaigns, and develop financial and other reports. All functions are more accurate because multiple entries about each client, prospect, or account are counted only once.

“Utilizing the SingleVision customer data integration solution, we are now able to use all of our data assets in an integrated manner to help up-sell, cross-sell, and overall better manage our business.”

Timothy Casey
Vice President & CIO
Conner Strong

Systematic use of their data is helping Conner Strong communicate their new brand to their customers, prospects, and industry partners. They have been able to accomplish all of these goals by leveraging their current data assets and without having to adopt a new ERP system.

Further, since the data is all correlated in a SQL database, if Conner Strong decides to change any systems or add any additional data sources to their single customer view, the new sources can easily be incorporated into the customer data integration solution.

About BDS

Since 1991, Business Development Solutions (BDS) has been focused on helping marketers of all sizes identify, analyze, and serve their customers and prospects more effectively. With this experience, BDS has developed SingleVision, the advanced data matching and linking process for maximizing the value and accessibility of the data BDS's client companies use and maintain.

BDS SingleVision®

- Intuitive, easy to use data integration software saves time and money
- Supports more effective planning and decision making at every corporate level
- For any organization that depends on more than one database or data source.

BDS BUSINESS
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