

ENGAGE CRM UK

CASE
STUDY

COMMUNITY
FIRST

// COMMUNITY FIRST (INSURANCE CRM)



Community First Case Study


At a glance

We have been working with Community First since 2021 to deliver a bespoke CRM system to centralise their Parish Council and Village Hall data and to process full bespoke insurance quotes and contracts.

The CRM has 2 bespoke modules that allow users to walk through an insurance quote and generate all of the required paperwork. Admin users have the flexibility to update insurance rates and calculations.

Key Metrics


 **3+**
Active Users

 **50% TIME SAVED**
Data input and paperwork


 **500+**
Insurance quotes processed



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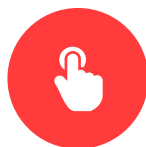
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KEY CHALLENGES FACED

- **Converting Spreadsheet formulas to CRM modules**
- **Generating compliance paperwork**
- **Notifications and Reports**
- **Payments and reminders**
- **Email marketing, invites and surveys**

SOME IMPLEMENTED SOLUTIONS



**Insurance
modules with
flexible rates**



**Quotes,
Contracts and
payments
process**



**Reminders and
Reports for
auditing
compliance**

BENEFITS

- 1 Client Data Centralised**
All customer information and history stored
- 2 Quotes and Pipeline Management**
Bespoke modules made for insurance policies and rates
- 3 Generating Paperwork**
50%+ reduction in preparing documentation
- 4 Sales Growth in 24 months**
CRM helped towards an increase of sales by £300k
- 5 Course and Attendee Management**
CRM Courses has helped organise and streamline processes

What Community First say...

EngageCRM has changed the way work drastically, our data input has been reduced by over 50%!

It really is a game changer for the insurance team and I can't thank the Engage team enough for creating our system!

- Jess Emery, Community First Insurance Officer