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## Jones & Wenner Insurance Agency, Inc.

### Company snapshot

Jones & Wenner, established 1975 in Fairlawn Ohio, has grown through a well-trained, experienced and professional staff with a serious, conscientious attitude toward their clients. Its owners pride themselves on working for their customers whenever they need them the most, serving clients whose businesses and industries they know in-depth through extensive experience and continuous learning.

**“ReferenceConnect is the best kept secret for agencies.”**

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Joyce Sigler,

*Vice President, Administration Corporate Secretary,  
Jones & Wenner Insurance Agency, Inc.*



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## Vertafore® Solutions: ReferenceConnect

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### Proven results:

- Turned searching for proper information from days to minutes
- Enabled new employees to ramp up faster
- Aggregated all insurance information centers into one central location

Vertafore solutions help Jones & Wenner Insurance, Inc. increase revenue, write business faster & more accurately, and enable their staff to become trusted authorities.

Being an independent insurance agent at Jones & Wenner comes with a badge of pride. Always putting their customer's needs ahead of everything else, this highly successful agency thrives on relationships based on trust. To continuously grow, they constantly look for better ways to become trusted advisors to all they serve.

### From Weeks to Minutes

In 2008, Jones & Wenner recognized that they needed to find a way to kickstart their business when they began noticing that paperwork for niche policies sometimes took over a week to find. Not only was this a bottleneck, but an opportunity for them to solve something that could save them time and get their staff back on track.

#### ***What did your daily operation look like when processing new policies?***

"We ran around looking for where those things were, we had stacks and stacks of paper of company appetite, some with filing cabinets that were full of nonsense, and it became more of a process to find resource data than to actually use it."

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"...it could've taken weeks, because if they went to look for something, it was kind of like an Amazon shopping experience, in a literal way, that they would find things that they were looking for a week ago..."

Management knew what the problem was immediately, it wasn't just organizing their work, but getting it all into one place so everyone could access it, no matter where they were or what the business was. That was when they saw ReferenceConnect, and they recognized the benefits it could bring to their business.

**"This could be our library, and it could be our base foundation."**

At first, the time savings had an immediate impact. "it literally made weeks and days turn into minutes." Getting back to business instead of spending time searching for documents was the first step in changing how they operated.

### Training the Future

Being able to put ReferenceConnect at the center of how they wrote business was key to getting their current staff back on track. "We wanted to make sure that everyone knew that there was one place to go." Jones & Wenner wanted to explore other ways that they could utilize ReferenceConnect when they realized that training new employees was the next benefit of the product.

"We had some seasoned folks that knew the industry inside and out, they had been doing some of these niche programs, but we realized we didn't have a great dissemination of resources that we could say to someone new, 'Take this and study this, and then let's talk about this.'"

Ramping up new employees didn't have to slow down their business or take time away from seasoned staff to pass on industry knowledge. Making sure that new employees had the right information to begin with made sure they were set up for success.

### ***How did ReferenceConnect directly affect your new and seasoned employees?***

"When they could find it quicker, then it became easier for them to disseminate that information, because they weren't getting distracted from something else. It took our education here to a different level." I think the resource piece then pays for itself to say, 'I know where to go, I have one place to go, I'm not reading 100 things on a Google search, I know what's designed for my agency, et cetera.'"

### Becoming more than just an agency

According to Joyce, one of the most critical pieces of their agency is creating relationships with their customers, which can be difficult.

"We think of everyone we do business with as our partner, we share risk, and we're assuring them to keep their business with us. We are asking different questions than just adding typical coverage into their requested policy"

"We're going steps farther, saying, 'Tell me about the exposure that that additional insured needs.' It allows us to operate more from a risk analysis and risk management perspective than just an insurance agent. I'm referring to the coverage analysis, the coverage checklist, and recommended coverages. I think it allows you to think on a different level, that allows you to look forward and be proactive in what you're doing, rather than reactive in what you're doing, and I think that makes a difference in our growth."



***So, what would you offer as advice to other agencies from this experience?***

"ReferenceConnect is the best kept secret for agencies. An agency can make it anything that they want it to be, there are people spending three times the time and effort, or the chatter time to find this data when they could have it right here. Knowing how to keep themselves from making major mistakes with employees today is huge, and I go back and reference that time and time again."

**To see how ReferenceConnect can change how your business uses information to grow, contact us today.**

Contact Us

or call 800.444.4813



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