



INTEGRITYFIRST

WITH INTEGRITY FIRST. THE REST IS EASY.

Case Study

Integrity First Consulting &
Agency in a Box

Building an Online Agency in Ninety Days

Section I—Overview

Timeframe of study: Feb. 3, 2010 – June 1, 2010

Integrity First Consulting is an independent health and life insurance agency offering a wide array of products from the nation's top carriers.

- **Website**
www.ifcagent.com
- **Products**
Health insurance, short term medical, accidental medical, dental and vision benefits, life insurance, critical illness, Medicare supplements, guaranteed acceptance alternatives, disability, discount medical program, international travel program.

iBoomerang.com, Inc. is a provider of Internet marketing solutions to independent agents and brokers, with a primary focus on the health and life insurance industry. Agency in a Box is iBoomerang's single platform agency management system designed to allow agencies to operate almost completely online.

Section II—Summary

IFC sought efficient web solutions that would streamline agency activities and allow managers complete remote oversight of their down-line agents. In order to do this, IFC needed an effective agent enrollment system, production tracking and Internet marketing products that would allow agents and managers to work together to drive their mutual growth.

By providing IFC a single, integrated platform with which to run their entire agency online, iBoomerang was able to meet IFC's aforementioned needs. Through various back office features, IFC agents and managers have interactive access to a wealth of agency information, statistics and resources. In this manner, iBoomerang has essentially helped IFC convert to a strictly online-operating agency.

Services provided through the Agency in a Box platform:

- Real-time annualized volume tracking and results
- Branded websites for individual agents
- Corporate website for IFC with agency back office
- Corporate Training Calendar
- iBoomerang Training Sessions
- Live support

Section III—Benefits and Analysis

- **Agent Recruiting and Enrollment**
Agency in a Box has made it possible for IFC to establish parameters of agent admission, creating a more effective enrollment process.

By requiring agents to invest in individual iBoomerang tool packages as part of the enrollment process, IFC has improved the quality of their active agent roster and ensured a stronger commitment to excellence on the part of their agents.

- **Management and Oversight**

iBoomerang's online functionality has allowed IFC managers greater oversight of their downline agents, most notably in regards to AV tracking and sales tactics.

Agency in a Box's annualized volume tracking capabilities have provided a means for accurate and efficient sales data collection. Live leader boards and real-time AV tracking provide transparency for both agents and managers alike in regards to their standing within the agency and overall agency production.

- **Business Growth**

AV tracking, combined with the live leader boards in the corporate back office, has cultivated a spirit of competition among IFC agents and has proved to be a catalyst for production.

The requirement of additional tools for each agent as set forth by IFC has contributed to individual agents' ability to increase their marketing reach and improve client retention strategies through effective e-mail marketing and client management systems.

- **Statistical Analysis**

Top weekly AV increase for month of Feb.	+45%
Avg. AV (top 3 agents) from Feb. – April	+50%
Avg. AV (top 3 agents) March – June compared to Feb.	+41%

IFC was also able to recruit and activate 65 agents within the four month timeframe of this study.

Section IV—Replication

The following rollout process should be implemented in the future setup of Agency in a Box:

- **Pre-Setup**

- Discussion of appropriate tools package for agency.
- Review Agency in a Box billing process.
- Sign iBoomerang contract.
- Sign ACH contract.
- Sign or provide insurance contracts.
- iBoomerang-Agency payment discussion.
- Coordinate payment plan.
- Agency-Agent payment discussion.

- **Week One**

- Administrative staff attend iBoomerang Training.
- Set up administrative tools.

Web Conference Tool.
Landing Page.
E-mail Template Tool.
Volume Marketing Tool.
Dynamic Event Calendar.

Determine agency domain name.
Establish, attend weekly meeting on Monday or Friday.
Assign in-house contact.
Gather general agency information.
Gather list of users/agents.
Carriers must be determined.
Gather logos, colors, previous Web sites, other printed materials for design.

- **Week Two**

Web site layout/design approval.
Construction of site.

- **Week Three**

Approval of site.
Orientations.
Develop training calendar.

Section V—Challenges, Solutions, Recommendations

The setup process for IFC was, for the most part, uninterrupted by any major hurdles or glitches. Apart from standard Agency in a Box services and features, IFC and iBoomerang worked together to implement the following:

- It is recommended that agencies establish strong parameters for agents to be considered 'active.' By requiring agents to purchase web tools before they can attain 'active' status, IFC has drastically reduced the administrative cost of their Agency in a Box system.
- iBoomerang was able to integrate the live leader boards of IFC and its subordinate agencies at the request of IFC management and with the consent of the other agencies involved. Agency administrators were given the ability to view combined leader boards of IFC and all agencies under IFC, while preserving the privacy of those agencies from their counterparts in equal standing.

Section VI—Conclusion

Through thoughtful planning and close consultation with iBoomerang developers, IFC has been able to implement all of the features of Agency in a Box with a high level of effectiveness. With a streamlined enrollment process and a production-conducive online infrastructure, IFC has seen significant growth not only in the number of agents operating under the IFC brand, but in the amount of business written by its agents. With a well-developed web presence and an understood commitment to accomplishing its

goal of being a top-producing online agency, IFC, with the help of iBoomerang, has enhanced its ability to serve not only its agents, but its clients as well in an efficient and qualitative manner.