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A case study in customer service

In a previous column I identified these four tactics that are effective for providing personalized customer service:

- Use names, introduce yourself and address your customer by name.
- Exhibit empathy so it is obvious that you care about the customer's situation.
- Make effective use of space by breaking down both literal and figurative barriers that separate you from your customers.
- Let the customer know serving them was a joy and not a chore.

Here's an experience I had as a customer that emphasizes the power of personalized service.

Soon after starting my own business, it became obvious I needed to procure insurance for it. I'll be the first to admit that as an insurance consumer, I'm a real loggerhead. My phobia for lawyer-speak fires up, my eyes glaze over and my head goes numb when reading about "auto exclusion endorsements" and "subrogation."

And that's with relatively simple matters covering autos and home where I have decades of experience. To say I wasn't looking forward to researching and procuring business



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insurance would be an understatement.

I started by calling the agency that handled our family insurance. We had enjoyed a good relationship for years. After leaving a voice mail message, I received a call from the business agent asking me "to stop down at the office, and we'll get started." He emailed application forms that would be used to quote the policy with various national chains.

I inquired as to an estimated cost for the coverage. Yikes! Let's just say it had an extra zero behind the value I had assumed in my business plan.

"Stop on down at the office," he repeated.

I decided to call an acquaintance with another local agency. Although he is the president of the agency, he took the call himself.

"Where do you live?" he asked.

I gave him my address, and he said it was on his way home (a bit of a stretch, I later learned).

"If you have time tonight, I'll stop," he said. "Let's discuss what

your business does and figure out what you really need."

As a new business owner there weren't enough hours in the day to address every need. Saving even an hour by having him visit me was a big deal.

When he arrived later that afternoon, his sole intent was to understand my business and provide me with the information needed (in plain English, no less) to make a sound decision. We determined that, due to the nature of my business, I didn't need all of the coverage originally thought and that my business plan estimate for the premium was indeed appropriate. The entire episode reminded me of sitting down with a friend or family member for advice.

Needless to say, he won the business. But it doesn't stop there.

The next time our family coverage was due, we asked for a comparative quote from the new agency and it came back favorable. Although we were happy with our family insurance agency, we switched. Our newlywed daughter and her husband are now quoting their family insurance with the new agency, and I've since referred several others. All because of the attention provided to me and my small business policy.

The old agency didn't necessarily do anything wrong; it's just that the new agency did things better. The new agency made me feel like I was their most important customer before they even knew I was a viable customer.

A few weeks after we transitioned our family insurance, I received a survey call from the national chain, which the old agency represented.

"Wow, this is impressive," I thought. "They want to learn from the experience so they can provide better service to others."

"Mr. Brimeyer, I understand that you have your home and auto insurance with us," the young interviewer asked.

"Well, I used to, but we recently transferred to another agency," I said.

"Oh, sorry to bother you," the interviewer said. "Have a nice day."

I sat for a couple of moments in stunned silence. Then I smiled, knowing we had made a good decision.

Rick Brimeyer is president of Brimeyer LLC, an independent management consulting firm located in Ames that guides organizations to higher performance by focusing on process improvement and leadership development.

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