



# INDEPENDENT INSURANCE AGENTS OF TEXAS (IIAT)

## CASE STUDY

### CUSTOMER DETAILS

The Independent Insurance Agents of Texas (IIAT) is a trusted resource for independent insurance agents in the state of Texas. The organization is committed to helping independent insurance agents succeed by providing quality educational courses, online technical and management resources and newsletters that keep agents informed of the latest industry news and events, and access to competitive markets through IIAT Advantage.

[www.iiat.org](http://www.iiat.org)

### INDUSTRY

Trade Association

### APTEAN SOLUTION

GoMembers Enterprise

### CHALLENGES

Outdated system  
Lengthy payment process

### BENEFITS

Improved response to member requests  
Online access to Continuing Education transcripts  
Automatic payments  
Elimination of lockbox and associated fees

### INTRODUCTION

The Independent Insurance Agents of Texas (IIAT) is the nation's largest state association of Trusted Choice® agencies, representing approximately 1,700 agencies and more than 16,000 agents and insurance professionals. IIAT members are advocates for insurance consumers by helping them comparison shop for cost-effective and customized coverage. IIAT is also affiliated with the Independent Insurance Agents & Brokers of America and works with legislative, regulatory and judicial bodies in Texas on behalf of independent insurance agents across the state. IIAT has 30 employees at its headquarters in Austin, TX, and 12 in its second location in Dallas, TX, who manage a variety of responsibilities, including membership, events, various insurance programs and educational resources.

### THE CHALLENGE

IIAT had been operating on an older version of Aptean's GoMembers solution since 2000. Beginning in 2009, the organization recognized the need to update their systems and provide their members with a more enriched environment for their web access. Use of a lockbox at a local bank to receive and deposit checks cost the organization several hundred dollars each month, and cash flow was inconsistent as they waited on checks to be mailed. They required integration with Microsoft Dynamics GP in order to move away from data exports for accounting reports.

## THE SOLUTION

After researching various software options, the search team decided to upgrade to the current version of GoMembers. Improved email extraction for marketing purposes was one benefit of the updated version. The Document Manager allows IIAT to attach documents and spreadsheets to a member record. Members can access their profiles to not only update their information, but also to view and print their enrollment application and transcripts. The GoMembers toolkit allows IIAT to update queries and modify forms based on their needs.

## THE RESULTS

After upgrading to a newer version of GoMembers Enterprise, IIAT has been able to simplify their payment process, making it even easier than ever for members to pay dues and meeting registration fees. Members no longer need to worry about remembering to pay for their membership as a specialized process within the system will charge a member's card based on their desired payment plan, such as monthly or quarterly payments. GoMembers has also increased the security of its members' credit card information as a result of the integration with PayPal, which redirects credit card transactions to the secure PayPal server. IIAT has achieved its goal of no longer having to pay expensive lockbox fees at their local bank as the software manages the transactions more efficiently.

GoMembers also improved other processes as a result of their upgrade. Licensed insurance professionals in Texas have a Continuing Education (CE) requirement. IIAT maintains an online CE transcript linked to members' records. As insurance agents complete their annual license renewal, they can pull their transcript from the IIAT website, rather than going through paper files. Another example can be seen with the Texas Department of Insurance (TDI) requirements for CE sign-in sheets. Previously, agents who had not received their CE certification would ask IIAT weeks after the class to follow up. IIAT would then have to go through a lengthy process to determine why a CE certificate was not issued. Now the first place customer service representatives look is GoMembers, where a copy of the sign-in sheet is attached to each meeting record.

IIAT is looking forward to additional enhancements to their system. The Directory+ feature provides expanded search criteria and geographic search results that will allow visitors to locate members within their specified area. IIAT is always looking for ways to improve their processes, and more staff members are cross-trained so they can deliver superior customer service.

Interested in learning more about Apteian's GoMembers Enterprise solution?

**Please contact** Chris O'Meara at 1-888-288-4634 ext 1082 or email [Chris.O'Meara@aptean.com](mailto:Chris.O'Meara@aptean.com).



**About Apteian:** Apteian is a leading global provider of mission critical enterprise software solutions. We build and acquire industry-focused solutions to support the evolving operational needs of our customers. Our solutions help nearly 6,500 organizations stay at the forefront of their industries by enabling them to operate more efficiently, thereby ensuring higher customer satisfaction. For more information, visit [www.aptean.com](http://www.aptean.com).