

# How Founder Shield saves 300 hours a month using Front's powerful automation

## INDUSTRY

FINANCIAL SERVICES

## COMPANY SIZE

51 - 200

Founder Shield is a tech-forward commercial insurance brokerage for rapidly evolving, high-growth companies. Born out of the founder's frustration with buying insurance at a previous startup, Founder Shield is committed to providing the most comprehensive risk management with the least hassle and stress.

Entrepreneurs rely on Founder Shield's digital application, in-house product offerings, and insurance-savvy support team to protect their growth. Founder Shield prioritizes 5-star customer service to help simplify a complicated process, and they're able to do this at scale with Front!

Their sales, account operations, and customer success teams use Front features to send fast, complete, and personal replies that contribute to their 78 NPS score.

## Hours lost, clients at risk

Embracing technology in the antiquated insurance industry made Founder Shield a go-to for entrepreneurs. But the team struggled to keep up with the company's rapid expansion.

Before Front, Founder Shield's client and carrier-facing teams used Google Groups to collaborate on accounts. It added huge volumes of unnecessary emails to everyone's inbox every day, wasting hours of reviewing and archiving irrelevant emails.

This time-consuming process made it difficult to provide effective and empathetic responses within their 24-hour response service level agreement (SLA). Team members spent more time sifting through their inboxes than with their clients, putting customer satisfaction and loyalty at risk.

## One tool, every team

Front enabled Founder Shield to boost productivity, efficiency, and standard of customer care as the company scaled.

Centralizing policy information from Salesforce, enabling cross-functional communication, and automating routing workflows kept everyone on the same page – no matter how many new accounts signed on.



Front is now an essential tool to our business. It's scaled from my small team of 5 to across 125 users from all departments and business lines.

- CHRISTINA CONWAY, CHIEF OF STAFF AT FOUNDER SHIELD

## Gaining 300 hours a month back, thanks to powerful automation

A smooth Founder Shield buying process depends on excellent communication between three teams: brokers, account executives, and operations.

With Front, everyone stays in sync. Using Front's automated workflows and native Salesforce integration, messages are automatically routed to the correct shared inbox and auto-assigned to the correct owner. No one has to sift through hundreds of emails or worry about getting cc'd on a chain last minute. This improves the speed and quality of customer communications – even as new hires come on board or account managers change roles at the company.

Christina explains, "The range of requests we receive varies greatly, from requiring underwriter confirmation to an official change to their policy, which can take days or weeks. Front has completely eliminated the issue of figuring out if anyone followed up and who's working on what. My team loves being able to reference the account history, especially when people switch roles."

Before Front, the team contemplated hiring someone to triage Gmail inboxes. But efficiency gains from Front have eliminated that need altogether. When two ops team members grew into roles in other departments, Christina realized she didn't need to backfill them – Front's auto-assign capabilities did all the work.

## Enabling better cross-functional collaboration with seamless handoffs

Front's collaboration features have been a gamechanger for their 3-person account management pods. It's easy for them to tag someone who wasn't on an original thread without creating duplicate emails. From there, teammates can send internal messages and collaborate on shared drafts to ensure that responses are both prompt and comprehensive.



My brain has blocked out everything before Front. The cross-departmental collaboration has been worlds better

- CHRISTINA CONWAY, CHIEF OF STAFF AT FOUNDER SHIELD

Team members can also view previous message history and Salesforce account data at a glance — knowing what coverage a customer has, when they're up for renewal, and any stumbling blocks before they reply. With all the customer context available and easy access to loop in a teammate for their input, Front's shared workspace has given Founder Shield a leg up on coaching their staff.

## Upholding unmatched service quality thanks to increased visibility

Despite Founder Shield's exponential growth, they've unlocked a new level of service by giving their customers confidence in their responsiveness. Instead of hunting down emails or digging for account information, they can go the extra mile on a risk assessment, deep dive into a customer's portfolio, or take time to explain why rates went up.

And it shows in the numbers. Today, Founder Shield boasts an impressive 78 NPS score (north of their 72 goal), and the operations team has a world-class CSAT between 90 to 100%.

Christina shares, "When you're able to go above and beyond, clients appreciate it and are thankful to be working with an insurance broker who really cares about them."

Behind the scenes, Front's SLA rules, analytics, and automated escalation workflows have helped Christina and other managers monitor reply times and balance employees' workloads as their team expands and changes.

Overall, Front helps Founder Shield continue to wow entrepreneurs and deliver on its promise of exceptional coverage and customer service at scale.



Everyone's singing Front's praises. A team that was initially reluctant about making the change to Front is now saying, 'I literally don't know where I would be without Front.'

- CHRISTINA CONWAY, CHIEF OF STAFF AT FOUNDER SHIELD

300

Hours saved per month

78

NPS score

+90%

CSAT score