

ASTONISH RESULTS' OCTOBER E-MARKETING AGENCY OF THE MONTH

# From Cavemen to Spacemen

*Texas firm ventures into digital marketing*

A stone pillar sign for Dagley Insurance & Financial Services. The sign is black with white text. The pillar is made of stacked stones and is topped with a concrete cap. In the background, there is a brick house with a gabled roof and a large green tree. The foreground has some purple flowers.

**DAGLEY  
INSURANCE  
& FINANCIAL SERVICES**



*The Dagley Insurance Team.*

Several years ago, Nathan Dagley observed a shift in consumer behavior, which led him to make some changes in how his agency generated leads. “In 2005, we vacated the Yellow Pages,” says Dagley, agency principal at Dagley Insurance & Financial Services, Inc., a multi-location agency headquartered in Katy, Texas. With that change, the agency relied primarily on centers of influence (COI) and client referrals to grow.

The agency dabbled some in electronic marketing, but its efforts lacked focus and organization. “We were doing several things,” Dagley recalls. “We ran some e-mail marketing campaigns and used some marketing newsletters. The problem was we lacked a clear e-marketing strategy and platform. We were scattered in how we did things—kind of like cavemen, doing our best to figure it out, but not getting very far.”

Last year, an agent friend asked Dagley to assess a digital marketing system it was considering. So he did. “When I looked at the platform from Astonish Results, for me it was an instant, ‘Okay, this is exactly what we need,’” he recalls.

Rather than make a major move on his own, Dagley assembled key staff members—those people who would use the system—and showed what it offered. Buy-in was immediate and the agency struck a deal. “In a very short time, we went from cavemen to spacemen,” he adds.

### **Blended approach**

The move led to the adoption of what Dagley refers to as a three-pronged marketing approach. “We look to current client referrals for a third of our new business,” he explains. Centers of influence account for another third. “Online is the other piece,” he adds. “We expect to get a third of our business through digital marketing.”

What Dagley finds particularly valuable is how electronic marketing works with the other approaches. “Digital marketing translates well into the other aspects,” he explains. “It works interactively with current client referrals, as well as COIs. For us, that blended strategy is very attractive.”

As with any change, different staff members respond differently. “Some embraced the digital initiatives very quickly,” Dagley explains. Those who

already used Facebook and LinkedIn, for instance, found the transition to be very easy. “For them, it was business as usual,” he adds.

“Others are still taking to it,” Dagley notes. “And that’s okay. What is great about our organization—and our multi-pronged marketing approach—is that those people who aren’t as comfortable in the digital arena already have very strong relationships they can build on. They can continue growing their business through referrals, and then work into the digital side of things a little more slowly.”

Dagley is not leaving these folks out to dry, though. “We know this is uncomfortable for some people, and we told them that,” he explains. “We have talked repeatedly about the need to get out of one’s comfort zone. As managers, we’ve come alongside them and helped them—taking them to Facebook and helping them set up an account, for instance.”

Trust plays a big role, as well. “Our people understand that, when we decide as an organization to do something, we have looked at all the angles,” Dagley says. “They know we will put something in front of them only if we really truly believe it’s



*Marketing Director Melanie Easterling.*

going to make them better. Our people know that, when all is said and done, we're not going to put them in a position to fail."

### **Networking online**

The agency is using social networking sites to drive traffic to the Dagley Insurance Web site and to generate leads. For instance, the agency uses Twitter to share information on broad range of topics. Recent "tweets" have directed readers to an agency blog posting on the need for wedding insurance, reminded followers of the agency's upcoming Halloween photo contest, thanked a center of influence for referrals, updated locals on Hurricane Karl, and directed people to a client-focused interview posted on the agency blog.

"Through social media, we are able to keep in contact with our clients," Dagley explains. "When there is a storm in the Gulf of Mexico, we can alert them daily of what is going on. When they wake up in the morning, there is a posting saying where the hurricane is and who it might affect." In addition to Twitter, the agency uses Facebook postings to share this and more information with more than 800 users who "like" the agency.

Recently, the agency's Facebook activity revealed certain site



*Joe Scott is an independent social media consultant who advises Dagley Insurance.*

*"We have written several commercial accounts, several significant accounts, solely and completely as a result of our digital marketing efforts."*

—Nathan Dagley

idiosyncrasies. "We are an e-marketing agency, and as part of that, we work hard to build up the number of people we interact with on Facebook," Dagley explains. To increase its following, the agency invites each customer who has a Facebook presence to connect.

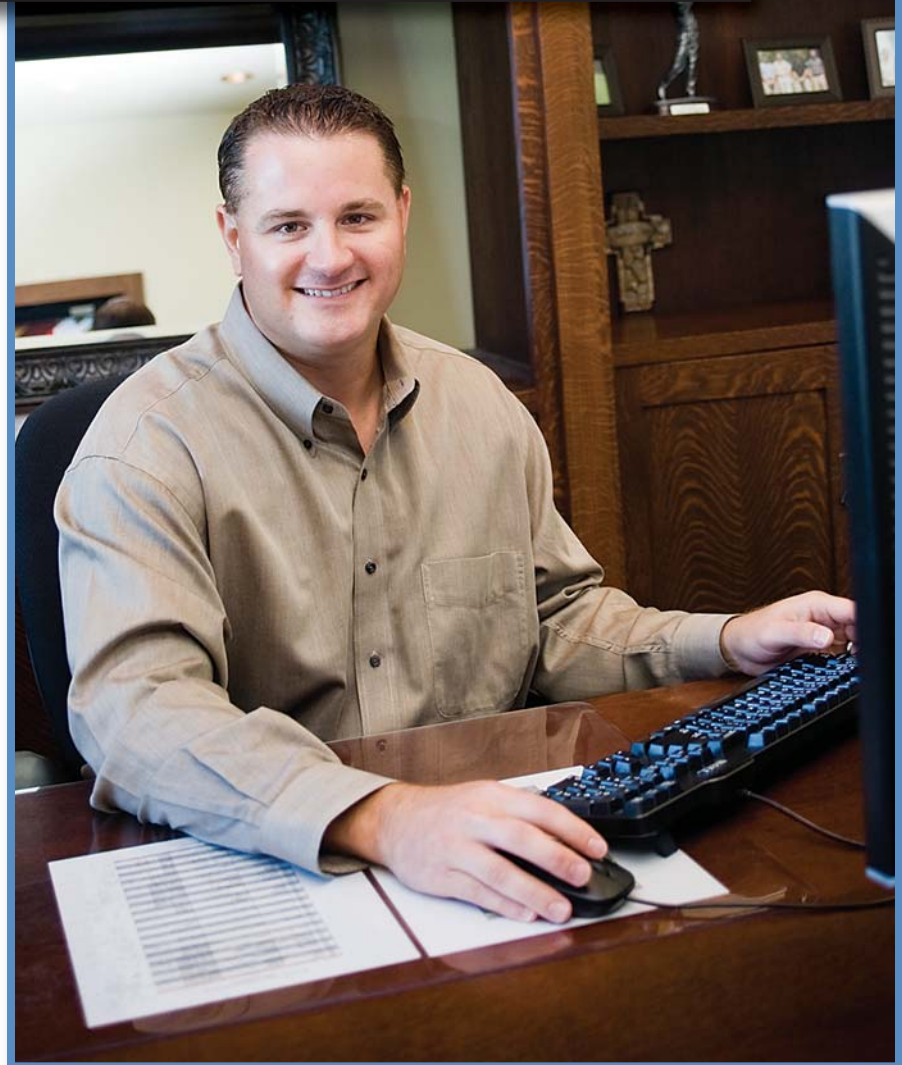
"Our Facebook site got shut down for two days recently for requesting too many friends," Dagley explains. The agency had an unusually high influx of clients after recent agency acquisitions in Colorado. "We sent invitations to all of these new customers, and that caused Facebook to take notice and shut us down briefly," he adds. "We are learning."

Staff members are learning, as well. "We have employees who signed up for Facebook for the first time a month ago," Dagley explains. "These aren't Generation Y people. They're seasoned insurance pros. What has been absolutely eye opening for them is finding out how many people they already know—friends and acquaintances, existing clients and even centers of influence—are already on Facebook. It's just mind-boggling."

### **Building up partners**

Mind-boggling for Dagley has been the positive reception within his community of the agency's Partners page, which highlights local businesses in nearly a dozen-and-a-half categories. "We have used the page to build relationships," he explains. "This not only helps drive business to our doors, but it also helps our partners in their marketing efforts—sometimes even introducing them to e-marketing."

Dagley finds it especially rewarding to help commercial insureds. "We can do more than just take care of their insurance needs," he notes. "We can also help them grow their business." In addition to posting information about the partners, the agency has sent e-mails on their behalf, helped build commercials for their use online,



mentioned them in Facebook and Twitter posts, and more.

"What we're finding, as we work to get our partners more involved on social media platforms, is that they are nervous about it," Dagley explains. "They are not sure of what to do, so we are introducing them to digital marketing by showing what we've done and the successes we've had."

Dagley Insurance's Partners page initiative covers more than just clients, though. "With our blended

strategy, we rely on centers of influence—in particular real estate agents, builders, auto dealerships and mortgage companies," Dagley explains. "We include them on our Partners page. We can spread the wealth, in a sense, and help our influencers when we communicate about them with our clients, directly and on the Web page."

The agency also spreads the wealth through its blog. "I didn't realize how successful blogging



An e-marketing strategy session includes (from left) Jamey Smith, Commercial Account Manager; Joe Scott; Melanie Easterling; and Nathan Dagley.

could be,” Dagley says. “We have not been at it long, but judging by comments, leads generated, how the search engines respond, it has been quite valuable.”

The agency uses the blog to offer risk management advice, share partner information and announce agency and community events. “For instance, we use our blog, not our Web page, to announce contests we run,” he adds. “The blog has ended up being quite popular and rather interactive.”

The agency is using the blog to make sure clients, prospects and other visitors know about a special Halloween photo contest. Within a couple days of posting the event in late September, the agency already had a half-dozen entries. “Our expectation is that the week leading up to Halloween is when people will put their kids on there,” Dagley says. “It should be a fun way to generate agency interest and traffic to our blog, Facebook page and Web site.”

### Serious work, serious results

While agency employees have had fun learning about and making use of digital marketing tools, Dagley says

the initiatives have required work—hard work. “It takes time and effort to be successful in the social media arena,” he says. “Of course, that’s true in any endeavor. But to have an impact with digital marketing, you really have to commit to it. You need to go all in.”

Staff members have done just that. “We knew it was going to take a lot,” Dagley adds. “Our people have been devoted to the work and I’m impressed with time and effort they’ve put in to make it succeed.”

While Dagley anticipated success in personal lines, because individual consumers are increasingly predisposed to shopping online, he was a bit surprised about how effective digital marketing has been for commercial insurance.

“There has been a lot more traffic and interest in commercial lines quoting than I ever imagined,” he explains. “We have written several accounts, several significant accounts, solely and completely as a result of our digital marketing efforts.

“These weren’t relationship-driven deals or blended deals,” Dagley adds, “but rather out-of-the-blue requests for quotes on, for example, \$20,000

commercial insurance policies. Sometimes we have to prospect for months to even get a shot at quoting something like that.”

Despite such wins, Nathan Dagley is somewhat reserved in his assessment of success. “We are just breaking into this,” he says. “We are barely through the door. We’re still experimenting and learning. And we’ll still be learning next year.”

Still, he says, the agency is on target to hit its initial electronic marketing goals and he is quite optimistic about the future. “I’m very pleased how far we have come in a relatively short time,” Dagley says, “but when I look down the road, I just think, ‘Holy Toledo, it’s going to be unbelievable.’” ■

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Web site: [www.dagleyins.com](http://www.dagleyins.com)

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