

ASTONISH RESULTS' JANUARY e-MARKETING AGENCY OF THE MONTH



Partee Insurance Associates: A Digital Agency Reinvention



“Every few years, you have to reinvent yourself.” That philosophy seems to have worked well for Wayne Partee, CIC, CWCA, president/CEO of Covina, California-based Partee Insurance Associates, as he has built his business

over the last four decades.

Partee was raised in a family insurance agency. “My first job was sweeping the parking lot at my parents’ office in the L.A. suburb of Whittier, California,” he recalls. When he graduated from college, he went to work with his older brother, who had already started to buy the family business. “I worked there about a year and then, as I tell people, I got exiled to Covina,” Partee adds.

He bought an existing agency there in 1972, forming Partee Insurance Associates, and in 1980 acquired the W.C. Gorman Insurance Agency, which traces its Southern California roots to 1928. In 2006, the agency opened an office in Middleburg, Florida, which serves the northeastern part of the Sunshine State.

The most recent reinvention Partee Insurance Associates has undergone placed it front and center in the digital marketing arena. “We partnered with Astonish Results last year,” Partee explains, “which has allowed us to refocus our agency for the future and to do things we’ve never been able to do before.” Astonish Results is an insurance-focused digital marketing and training company.



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*—Wayne Partee
CICA, CWCA*

Niche success

Among the “never been able to do before” items enabled by the e-marketing initiatives is a focus on specific commercial market segments. “We’ve never really had a niche market,” Partee says. “We have always been generalists. Astonish is allowing us to develop niche marketing in several different areas, using the power of the Internet to identify, contact, solicit and even write businesses—and to do it quickly, easily and cost effectively.”

While difficult to call it a sweet spot, given the nature of the segment, an initial niche success at Partee Insurance is septic contractors. “To be part of the septic contractor program, you have to have a pumper,” Partee explains. “You have to be able to clean out the tanks and if you have portable toilets, you need a pumper to clean them. The program really lasers down into a true niche. Maybe you could even call it a crevice.”

The agency is also using digital marketing to build its specialty focus on wineries and automobile dealer bonds. “What’s good about building a niche is that you can branch into other coverages,” Partee notes. “We

are working on packages for septic contractors and wineries and bonds for auto dealers. But we also see lateral movement into workers comp and, for auto dealers, into liability and floor exposures.”

To build on early segment marketing successes, the agency is set to begin a concerted effort to generate more opportunities. “We’re going to be on the phone more, getting more e-mail addresses,” he explains. “We’re continuing to extend our reach into existing segments, and to capitalize on digital marketing opportunities for other segments we’d like to build,

including manufacturers, restaurants and food distributors.”

Driving traffic

In addition to its e-mail-based niche marketing initiatives, Partee Insurance is finding digital success through search engine optimization and other traffic-generating activities. “We are getting greater exposure on Google in two ways—with pay-per-click and organically,” Partee notes. “We’ve really seen an increase in online visibility. Best of all, we’re getting more calls.”



Heather Potter is Director of First Impressions.



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The calls aren't just from personal lines shoppers. "We are pulling all types of leads," Partee notes. "Through the Internet, we are getting bond leads, commercial leads, workers comp leads, liability leads and, of course, homeowners and some auto." The calls aren't just coming from—or to—California, where the search optimization emphasis is underway. "We're also getting calls to our Florida agency," Partee notes. "Our Internet success is bleeding over to our office on the other coast."

The agency also launched a blog, established a Facebook page and created a Twitter profile. "We brought in a college student to work part time, helping us get our social media presence underway," Partee explains. Partee sees value in tapping students for social networking work, as well as other digital marketing tasks, such as harvesting e-mail addresses for marketing campaigns.

The student is not handling social networking activities in a vacuum. "Producers in the office are working with him," Partee explains. "We find or help create content that he can blog about and that we can post to our Facebook page and share on Twitter."

The social networking efforts are working. "We are getting more and more people visiting our blogs and to our Facebook page," Partee says. "And that's driving them to our Web site," where clients can request information via a Web form or find the agency phone number and call for a quote.

Making connections

Even as he approaches what some consider to be a traditional retirement age, Partee is building social media expertise. "I am becoming more and more adept at Facebook through my iPhone," he explains. "I'm making Facebook friends with more people and I was tweeting during a trip I took this summer to Africa."

Partee finds he's not alone as a Boomer in the digital world. "People in various organizations I know are active, as well," says Partee, who is heavily involved in local and regional agent groups. "I'm finding other agents—my peers—who are savvy in social media. I'm also finding many of our clients, and not just younger ones, who are active on Facebook and other social networking sites."

The agency is bolstering its digital-driven relationship efforts with a page on its Web site that showcases agency commercial lines clients, as well as nonprofit organizations, including local Chambers of Commerce. "Astonish Results encourages us to have what's called a Partners page," Partee explains. "We have been adding clients regularly and will be creating videos of them and their businesses that we can post on YouTube. These will work as ads, if you will, for the Partners, and will help increase traffic for us because of links between our and their Web sites."

Officewide success

According to Partee, employees took the most recent agency reinvention in stride. "I often tell my staff that, after 38 years in this business, our motto is, 'The only thing you can count on at Partee Insurance is change,'" he says. "Our employees welcome change, and their response to our increased digital marketing initiatives is no exception."

Partee is not the only one that noticed. "Julianne, our Astonish



Partee Insurance team members include (clockwise from top left): Tootie Norton, Injury Cost Coordinator; Lupe Camacho, Personal Lines Account Manager; Jean Megowan, CISR, Personal Lines Account Manager; Kelly Ann Marteeny-Snyder, AIS, CISR, Personal Lines Account Manager; Stefanie Rico, Commercial Lines Account Manager; and Jesse Durarte, CLCS, Commercial Lines Account Manager.

‘raving fan manager,’ has commented a number of times how she is so amazed that everyone in our office bought into the changes and how much they support them and are pushing them forward.” For instance, staff members are posting to Facebook, share agency posts and building relationships—inside the office and out.

Creating a culture that embraces change doesn’t happen by chance. In addition to his time-honored admonition of change, Partee also believes—and shares with staff—that “when you get in a comfort zone, you’re dying.” In advance of the foray into digital marketing, Partee gave everyone in the office a book on change management. “I wanted to equip them to start dealing with what was going to happen,” Partee explains. “I let them know there would be a different way of doing business, a different way of pulling in accounts, than we have ever done before.”

This made the most recent reinvention easier, he adds. “They endorse it and embrace it,” he says, “because they see that it is bringing business to the office, which means the office is more successful. And that is better for them.” Today, employees who were focused more on processing and service tasks are now handling

leads, selling new business and rounding existing accounts.

A bright future

According to Partee, results from the agency’s entrée into e-marketing are better than expected. Sales are up. In fact, he says, money that the agency is making from its new niche focus alone is more than paying for its digital marketing initiatives. More than that, opportunities for continued growth abound. “The more I get into it, the more I learn about what electronic marketing and the Internet have to offer, the more excited I get,” he says. “Every week—sometimes more often than that—I discover new ideas and new possibilities.”

For instance, the agency expects to expand its online presence and build niche-specific blogs to help drive even more traffic and generate more leads. In addition to increased niche business, the agency is finding new buyers for standard insurance. “Our Internet activity has taken us in a whole different direction,” Partee explains. “People are finding us who never would have found us before Astonish. I consider that to be a very good thing. It’s raising our level of visibility way beyond anything we could have done.”

The biggest challenge for Partee is finding enough hours in the day. “I’ve been in this business 38 years,” he explains. “I am 64 years old and there is so much to do. Actually, it’s been reinvigorating. I’m working out more and I’ve lost weight.”

Actually, there’s no cause and effect at play here. Partee’s diet and exercise plans were made independent of his decision to partner with Astonish Results. And he does not promote the partnership as a weight loss program for agency principals. Still, he says, “I’m better able now to keep up with the demands!”

His agency employees share his enthusiasm. “People in my office are very excited,” he notes. “This is a key ingredient in our future as an agency. It gives us a tremendous amount of opportunity we would not have otherwise had. I see our relationship with Astonish as a reinvention of Wayne Partee and of Partee Insurance Associates.” ■

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