

Creating Customers for Life.™



"GoldMine's ability to be customized is key to its success here at LifeUSA."

-Lynn Muggli, GoldMine Administrator

Company Profile: Life USA Holding, Inc. is a national, financial services holding and marketing company with four subsidiaries — LifeUSA Insurance Company, LifeUSA Marketing, Inc., LifeUSA Securities, Inc., and LTCAmerica Holding, Inc. LifeUSA Insurance is licensed to write and sell life insurance and several forms of annuities. Their products are represented by more than 140 marketing organizations and 74,000 independent agents nationwide. LifeUSA Marketing focuses on expanding the Company's distribution system through aggressive recruitment of marketing organizations and independent agents. LifeUSA Securities is a full service registered broker-dealer in all 50 states. LTCAmerica is the new long-term care insurance holding company.

Business Need and GoldMine Solution: LifeUSA did not use a customer management system before adopting GoldMine. LifeUSA's call center staff used the Company's mainframe administration system to look up information when taking calls, but never to record additional information about each contact, above and beyond what the system already required (name, phone, address, etc.)

LifeUSA's commitment to exceptional customer service drove the Company to seek out a customer management system. LifeUSA wanted to provide a higher level of service to its agents. LifeUSA started looking for a solution that was Windows-based and would allow everyone to share information across the network. It had to be user-friendly and enable them to keep detailed information on their interaction with LifeUSA agents. In 1996, LifeUSA implemented GoldMine 2.5 as that solution. Now, when an agent calls in to LifeUSA, it doesn't matter who answers the phone, because he/she has instant access to that agent's call history at his/her fingertips and can pick up where the last person left off, without rehashing all the details.

In 1998, as LifeUSA saw its database rapidly approaching 100,000 records, the company re-evaluated its customer management system alternatives. After evaluating several alternatives, LifeUSA reaffirmed its commitment to GoldMine and was an early adopter of GoldMine 4.0. They were very impressed with GoldMine's ease of use, its ability to be customized, and its scalability. The ability to re-host their data to a client/server database would insure the security and integrity of LifeUSA's growing database.

Company:
LifeUSA

Industry:
Insurance

Contact:
Lynn Muggli
GoldMine Administrator

Number of Users:
75

Environment:
Microsoft SQL 6.5

Business Benefit:
"GoldMine's connectivity with Microsoft Word is very convenient because you don't have to teach your employees how to use all new software," says Muggli.

Add-on Products:
FaxRush



Today, LifeUSA has over 75 users on GoldMine 4.0 Enterprise Edition, which has been re-hosted to a Microsoft SQL 6.5 database. GoldMine is currently used in three of LifeUSA's subsidiaries — Marketing, Securities, and LTC America. Each of these subsidiaries has an inbound and outbound call center and uses GoldMine to keep track of all interactions with their agents.

As LifeUSA's GoldMine Administrator, Lynn Muggli's role is to train new users, trouble shoot, and assist LifeUSA's employees with making the most of GoldMine. In preparation for her position as GoldMine Administrator, Lynn Muggli attended a number of advanced GoldMine classes from a local GoldMine Solutions Partner. This training provided her with the knowledge needed to support GoldMine and forge ahead with its integration and customization. To assist her with her GoldMine duties, she has trained several employees to act as mid-level support. In the event of her absence or unavailability, these individuals can answer basic questions about GoldMine.

Muggli is continually customizing GoldMine in order to more effectively meet LifeUSA's needs. In the process, she has added hundreds of custom, user-defined fields to GoldMine. "GoldMine's ability to be customized is key to its success here at LifeUSA," states Muggli. She has further adapted GoldMine by creating standardized merge forms for use in each division of the company. By using GoldMine's document merging feature, employees can merge contact information directly from GoldMine to a Microsoft Word document. This not only creates consistency in all employee correspondence, but also saves a lot of time for LifeUSA. "GoldMine's connectivity with Microsoft Word is very convenient because you don't have to teach your employees how to use all new software," says Muggli.

Database security is also an extremely important issue for LifeUSA. GoldMine's multiple levels of security have proven invaluable, allowing Muggli to grant security rights to individual GoldMine users or user groups. "Because of GoldMine's security rights, I can manage who views or edits information," says Muggli. "This GoldMine feature has made my job easier."

GoldMine is used to store any and all agent information that is necessary for the day-to-day activities of LifeUSA's employees. GoldMine is integrated into a desktop, which also includes access to LifeUSA's Information Library, where call center representatives share access to a central Information Repository containing key information about the company's products.

LifeUSA uses GoldMine's import/export function on a weekly basis to import and update records from their mainframe administration system. This feature enables LifeUSA to keep its GoldMine databases up-to-date and ensures all critical information is quickly available in one application. Muggli recently

used the import/export feature to update area codes by exporting the phone numbers out of GoldMine, scrubbing them for area code changes, and then importing them back.

Mugli has been very impressed with the quality and quantity of GoldMine add-on products. LifeUSA utilizes FaxRush, by Z-Firm (www.faxrush.com), to automate the faxing of documents directly from GoldMine. FaxRush's integration with GoldMine has become a crucial part of LifeUSA's day-to-day operations.

Today, LifeUSA plans to continue to assess opportunities to use additional GoldMine features and add-on products to streamline their business. Immediate plans are to add Caller-ID software as well as software that will allow them to dial directly through their PBX phone system.