

The logo for Act! is a bright orange circle containing the word "act!" in white, lowercase, sans-serif font. A small trademark symbol (TM) is positioned to the upper right of the exclamation point.

act!™

A top-down view of a business meeting. Several people are gathered around a table, looking at documents and a laptop. The scene is overlaid with a semi-transparent blue circle. The text "Act! helps MAP Insurance connect its customers with perfect-fit insurance and financial strategies and solutions." is written in white, bold, sans-serif font across the middle of the circle.

Act! helps MAP Insurance connect its customers with perfect-fit insurance and financial strategies and solutions.



Since 2007, MAP Insurance has been helping connect customers with the right insurance and financial strategies and solutions. Founded in Ottawa, Canada by Bill Munn and Richard Perkins, the two bring decades of experience and expertise in the insurance industry, priding themselves on unmatched customer service, and forging long-lasting relationships with everyone they assist. As brokers, MAP Insurance works with a wide set of clients, connecting them with everything from disability to travel to dental policies. And while the insurance companies with whom they work do track customer information, it's only for that one business. For MAP Insurance, the challenge arises when trying to monitor and maintain touchpoints with customers across a massive set of insurance companies, varying policy terms, and other factors. For insurance brokers, customer relationships mean everything, and staying on top of every policy and customer detail can mean the difference between missed opportunities and success. After learning of multiple positive experiences with Act! from colleagues, MAP Insurance got to work incorporating its most critical client data into the platform.

“Act! was exactly what I needed. When we set out to adopt a new CRM solution, there really wasn't anything that fit our needs. No other CRM solution I looked at could offer the level of customizability that Act! delivered. They understand our industry and give me the tools to track the most important information, in a way that's tailored to our business.”

**Bill Munn**  
President MAP Insurance



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## Centralizing Customer Information with Act!

In their line of business, MAP Insurance handles vast amounts of various customer information—driver's license details, personal information, social insurance numbers, and policy numbers—all of which need to be readily accessible. Much of the company's business depends on term insurance, which makes keeping track of all those clients even more important. With their Act! CRM and marketing automation platform, MAP Insurance was able to quickly get organized, scan all of those crucial client details into the database, and bring everything into one centralized location. MAP Insurance deals with well over 1,000 customers, which can make maintaining a strong relationship with every person challenging. With Act!, they are able to keep detailed notes about every client, their family, and other information that ensures they always know the latest with what's happening. And to ensure the best customer experience, they even leverage the photo feature within Act! to include an image of their customers, so they aren't just dealing with a faceless name, developing a more personal relationship. With customer details organized, when a renewal date or term ending begins to approach, the MAP Insurance team can easily monitor and reach out

to those clients to check in well in advance, which gives them ample time to conduct research and come prepared with the best policy options. Act!'s Task List tool ensures that the team never misses out on an opportunity to touch base with customers, reminding them of key dates, anniversaries, or policy renewals that are approaching.

## Act! Delivers a More Flexible and Agile CRM Experience

Even before the COVID-19 pandemic, more and more insurance companies were moving their operations online. For a business that, in the past, has involved in-person meetings with clients, Act! helped MAP Insurance adapt, bringing all of its important customer details into the cloud, making it easy to access everything they needed, without having to go into the office to do it. Once MAP Insurance had all of its customer information within its CRM platform, it gained access to, what effectively became, a virtual office, allowing them to never miss a client milestone or an opportunity to close another sales opportunity.

“Simply put, we wouldn't have written as much business as we have, without our adoption of Act!. With our data centralized in one place, we're able to unleash the full capabilities of our Act! platform to keep in touch with clients on a regular basis. In a business like ours, those touchpoints are essential, in fact, often enough on their own to close a critical sale.”

**Bill Munn**  
President MAP Insurance



## Building Stronger Customer Relationships with Act!

Act!'s highly customizable features enabled MAP Insurance to gather all of its client data in a way that actually made it possible to gain insights and take meaningful action. Something as simple as checking in with a customer a few years into a policy to gauge how they're doing, or even sending a note to wish them a happy birthday, capturing those important moments in time is part of what makes MAP Insurance so successful. With an eye toward the future, MAP Insurance is going strong and continuing to grow its customer base, strengthen relationships, and deliver the best possible service for everyone they help.



## Results

- Act!'s CRM software gave MAP Insurance the ability to centralize vast amounts of disparate information from over 1,000 customers into one place, allowing them to gain a holistic view of every customer and their needs.
- Act!'s Task Lists made it easier to track key dates and anniversaries, ensuring MAP Insurance never missed a chance to reconnect with clients and deliver them the best policy options, well in advance of a policy's end date.
- With greater customization and easy-to-use features, MAP Insurance leveraged Act! to package up customer details, background, policy information, and previous touchpoints to build stronger relationships and seize opportunities with repeat customers.
- Implementing Act!'s CRM and marketing automation platform meant MAP Insurance could better support their customers, accessing their information from anywhere, and never miss an important milestone—no post-it note reminders required.

## About Act!

With proven CRM and powerful Marketing Automation, the possibilities are limitless. Act! provides the ultimate toolset to build relationships, maximize engagement, and drive business growth.

[START YOUR FREE TRIAL](#)

## Contact Act!

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