

## PROXIOS CASE STUDY

# Proxios Provides Flexible, Secure Solutions for Invincia, when it Matters the Most

**The Client:** Invincia Insurance Solutions is a mid-sized Chesterfield, VA-based business that was founded in 2006 by Frank Beale, and while the name and logo are relatively new, the staff, clients, and overall agency philosophy are not. As co-owner of the agency from which Invincia spun off, Frank's goal remained constant - for the company to provide superior customer service, offer sound advice, and serve as an extension of his clients' management team. With over 100 years of combined experience and representing over 100 insurance carriers, Invincia takes pride in the long-term relationships built with clients and carrier partners.

### The Challenge

The Invincia team works diligently to achieve balance in providing excellent customer service to its clients, while also providing them with a wide array of coverage options and products. These include Employee Benefits, Safety & Loss Prevention, Commercial, and Individual/Personal insurance products.

Given the nature of Invincia's industry and offerings, it's no surprise that sometimes dependable support is required by its clients during times of unforeseen, difficult situations. A prime example of this is bad weather. When clients need assistance during a natural disaster, it is imperative that Invincia's team can still be there to provide it, no matter what.

During times like this, it can be unsafe for Invincia's staff to even commute to the office to get the job done. However, those are the very times that their clients depend on assistance the most. An effective way to keep Invincia's team safe while still providing that superior

customer service remains a necessity, regardless of what Mother Nature is up to.

In addition, the vast number of insurance offerings provided by Invincia, along with its very client-oriented approach, requires agents who are on-the-go and working frequently in the field. Reliable, constant, and secure access to files and client communications is crucial to the daily business operations, and long-term company growth.

### The Solution

Based on an existing relationship an Invincia team member already had established with Proxios, it was decided that a partnership could provide the solutions needed for Invincia to overcome the challenges mentioned, and still reach its high expectations of superior customer service regardless of what may be happening outside the office walls. Proxios currently provides multiple cloud solutions to Invincia, including:

data analysis, email, voice-over IP phone, and an online environment for its agent management system and accounting systems.

These solutions allow Invincia employees to work more efficiently both in-house and remotely, without having concern about access to critical and confidential client information, or the security that must surround it.



## The Results

Patrick Beale serves as CFO and Risk Consultant with Invincia, and emphasizes the importance of employees constantly being accessible for the business's clients, especially during a turbulent situation. Proxios solutions have made this possible, and he believes it is a major factor in the company's on-going success.

Patrick explained, "We are really a professional service provider. Even if Virginia is getting pummeled by a hurricane, we are able to remain up and running and our employees can still get the job done even if the office is shut down. The time we're going to get our most calls is when a disaster hits, so Proxios absolutely helps us, especially from a claims management perspective."

Because Proxios' industry is similar to that of Invincia's in that a majority of calls are received when a problem arises, Invincia has a special appreciation for the strong and steadfast service offered by Proxios. "This speaks to the team approach Proxios has, as well as the training that allows it," said Patrick.

He cites this team approach taken by Proxios as being the driving force behind the solutions truly working for his company. This method allows the Proxios team great familiarity with the

Invincia account, which gives Proxios full knowledge of the company's nuances, as well as a better ability to troubleshoot if a problem arises. Patrick stated, "The service team at Proxios consistently does a good job of handling even difficult situations."

In addition, Proxios has provided suggestions to Invincia in areas that are beyond its own scope of offerings, exemplifying the care and knowledge that go into the partnership. IT issues and changes are no longer stressful to Invincia, and this frees the company to focus on its business rather than devoting efforts to necessary fixes and transitions. Proxios has coordinated and facilitated changes and upgrades, and in doing so, has taken the weight off the shoulders of Invincia employees. Proxios has always been openly available to meet the needs of Invincia, and has provided further guidance for the future of the cloud as well.

An additional perk to the partnership has been an improved work/life balance for Invincia employees. Whether it's a difficult weather scenario or an agent who is regularly out in the field, the team recognizes its well-being is of importance to the company, while still being afforded the innovative tools needed to get the job done well, even when not in the physical office.

"Our partnership with Proxios has provided us with more security, which in the insurance industry is huge because we work with a lot of confidential client information."

– Patrick Beale

"Our employees have the flexibility to work remotely, which is the beauty of working in an online environment."



Proxios is headquartered in Richmond, Virginia and is the business of IT as a Service (ITaaS). As a pioneer in the field beginning the cloud journey in 1999, we have proven knowledge and experience to move customer infrastructure to the cloud, freeing customers to do what they do best, driving real business value from the applications that help run your business. We provide a wide range of cloud services to our customers throughout the United States and Canada including telephony and collaboration, business virtual desktops, and application hosting.

# PROXIOS

For more information on how Proxios can provide a total communications solution for you: [Call 888.342.1204](tel:888.342.1204)

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