



CASE STUDY

How Pathway Transformed Operations at Ellis David and Set the Stage for Growth

Time Saved

0.5 FTE

Pre-Renewal Engagement

+10% in change requests.

Payment Delays

from **6 to 4** days.



Anecdotal evidence shows we've freed up approximately half of a full-time position. This is a substantial improvement for a small organisation like ours, where staffing costs are our largest expense. This efficiency allows us to focus more resources on acquiring new clients and driving business growth.

— **Simon Brewster**, Director at Ellis David

Ellis David Insurance Brokers

Established in 1972, offers expert advice and a wide range of personal and business insurance products. With over 100 insurance providers and access to nearly 1000 schemes, they ensure clients get the best value tailored to their needs. The team's commitment to personalized service stands out in a market dominated by automated processes. Ellis David provides coverage from various sectors, including motor, liability, and property insurance, with a strong focus on understanding each client's unique requirements.



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Improving Operational Efficiency

Integrating Pathway into our processes has been transformative in increasing operational efficiency. Initially, our goal was to reduce the number of low-value tasks, allowing our team to focus on client engagement, retention, and onboarding new customers.

One standout feature of Pathway that has significantly improved **Ellis David's** daily operations is automated payment reminders. Previously, ensuring timely client payments was a labour-intensive administrative task. With Pathway, weekly reminders are now automated, saving significant time for our support team. This automation has also improved our cash flow, as the average number of days clients took to pay past the due date dropped from **six to four days**.

Enhancing Client Experience and Retention

Pathway has significantly influenced our client experience and retention rates. The design of Pathway's emails—created in collaboration with their team—aligned perfectly with our rebranding efforts. These professional, dynamic emails now include features such as links for callbacks or payments, which have been well received by clients.

We also developed a **pre-renewal email workflow** that complements our existing telephone calls—something that would not have been possible without Pathway.

Before Pathway, only about **50% of our clients** could be reached before their renewals were processed. With the addition of email touchpoints, we've seen a **10% increase in pre-renewal change requests**. This ensures renewals are issued with accurate terms, minimising the need for adjustments later and enhancing overall client satisfaction.

Previously, only half of our clients could be contacted before their renewals. With Pathway, our success rate has significantly improved, allowing us to issue renewals on accurate terms and avoid later adjustments.



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Streamlining Operations and Data Management

Pathway's integration with **Acturis** has created a seamless operational flow. Its two-way sync ensures data accuracy and eliminates the need for manual updates. For example, when preparing for a renewal, it's now routine to find that a pre-renewal email has already been sent and that client responses with updates are ready. This proactive approach reduces workloads and enhances communication consistency with clients.

We often forget that Pathway is running in the background—once set up, the automation ensures communications are sent as expected. When we review a renewal, for example, it's a pleasant surprise to see that a pre-renewal email has been sent to a client and a response received with any necessary changes.”

By automating tasks like **pre-renewal emails six weeks in advance** (or **eight weeks for complex cases**), we've improved our ability to anticipate and meet client needs, demonstrating a level of proactivity that sets us apart.

Overcoming Operational Challenges

Before Pathway, our team faced several challenges, including:

- High administrative workloads
- Inefficiencies in client communication
- Underutilisation of skilled staff

These low-value tasks were not only frustrating but also detracted from our primary objectives: delivering excellent service and growing our business. Our guiding principle is that **80% of our team's time** should be focused on key objectives—ensuring great service, retaining clients, and onboarding new customers. However, we were falling short of this metric.

Pathway addressed these challenges by automating repetitive tasks, allowing our team to focus on high-impact activities. This shift has improved morale and ensured our team members can concentrate on tasks that directly benefit our clients and drive organisational growth.



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Supporting Business Growth and Scalability

Pathway has played a crucial role in shaping our growth strategy. By automating previously manual processes, we've laid a strong foundation for scaling our business. With more resources allocated to core objectives, our team is now better positioned to retain clients and pursue new business opportunities.

Cross-Selling Campaigns

We've also launched **targeted campaigns** to cross-sell additional products to existing clients and re-engage past prospects. These efforts have already started yielding results, with **warm leads generated through automation leading to higher conversion rates**.

The combination of automation and Pathway's ability to run in the background has made us more efficient and better prepared to scale our team and operations.

The positive impact of Pathway on our growth trajectory is undeniable. Pathway isn't just a tool—it's a growth partner.



Conclusion

Pathway has not only streamlined our processes but has also enhanced client satisfaction, improved operational efficiency, and supported our long-term growth objectives. By automating low-value tasks and fostering meaningful client engagement, we've positioned our business for sustained success in a competitive industry.

Learn more about [Ellis David](#).

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