



## CASE STUDY

# How Heath Crawford Revolutionised Payments and Improved Client Retention

## Heath Crawford

Heath Crawford is a leading insurance brokerage specialising in delivering bespoke risk solutions for businesses and individuals. With a strong focus on client service and operational excellence, Heath Crawford has built a reputation for reliability and innovation. The firm continually embraces cutting-edge technology to enhance efficiency, improve client communication, and drive business growth.

By integrating Pathway's insurance automation and workflow capabilities, Heath Crawford has successfully streamlined processes and optimised service delivery. At Heath Crawford, we believe that every business and individual can benefit from proactive, expert, and personalised insurance and investment advice.

Our goal is to make this a reality by providing access to all leading providers, backed by personable, highly qualified advisers and market-leading technology.

## Improving Operational Efficiency with Smart Automation

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 Heath Crawford'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 considerable 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 has decreased.

**“Pathway has been massively impactful—our team no longer has to manually chase outstanding payments, allowing them to focus on high-value tasks. The efficiency it brings is invaluable,”** says Oliver Leyens, Managing Director at Heath Crawford.

Previously, a full-time employee spent hours each week manually contacting over 100 clients regarding overdue payments. With Pathway's automated workflows, follow-ups are now triggered systematically, drastically reducing the manual workload and ensuring more timely payments.

## **How Heath Crawford Revolutionised Payments and Improved Client Retention**

Pathway has significantly influenced our client experience and retention rates. The design of Pathway’s emails—created in collaboration with their team—perfectly aligns with our branding 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.

Now, Pathway automatically sends pre-renewal emails, complete with key policy details such as:

- **Renewal dates**
- **Last year’s premium**
- **Risk address**

With the addition of emails, we have seen a significant increase in pre-renewal engagement, ensuring renewals are issued with accurate terms, minimising the need for adjustments later and enhancing overall client satisfaction.

“Clients now receive timely, structured renewal reminders, enhancing their experience and boosting engagement – and they absolutely love it.”



## **Streamlining Operations and Data Management**

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 diverted time away from our core priorities: providing outstanding service and expanding our business. Our key principle is that the majority of our team's efforts should be directed towards essential goals—delivering exceptional service, retaining clients, and onboarding new customers.

Pathway resolved these challenges by automating repetitive tasks, freeing our team to focus on high-impact activities. This shift has allowed team members to concentrate on work that directly benefits our clients and drives business growth.



## Scaling for Success: How Automation Fuels Business Growth

Pathway has played a crucial role in shaping our growth strategy. By automating previously manual processes, we have 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 have also launched targeted campaigns to cross-sell additional products to existing clients and re-engage past prospects. These efforts have already begun to yield results, with warm leads generated through automation leading to higher conversion rates.

“Pathway has helped us identify coverage gaps and proactively offer relevant solutions, significantly improving our ability to cross-sell and generate warm leads,”

The combination of automation and Pathway’s ability to run seamlessly 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

Heath Crawford continues to expand its automation efforts, integrating Pathway more deeply into its workflows to drive greater efficiency and client engagement. Future plans include automated client feedback collection and further enhancements to streamline operations.

Pathway has not only optimised our processes but has also significantly improved client satisfaction, operational efficiency, and long-term business growth. By automating low-value tasks and fostering meaningful client interactions, we have positioned our business for sustained success in an increasingly competitive industry.

### About Pathway

Pathway is a cutting-edge automation platform that streamlines insurance operations by reducing administrative tasks, improving client engagement, and enhancing efficiency. With seamless integration into major BMS/AMS such as Acturis, SIG, Power Broker, Applied Epic, and others, it enables brokerages and insurance agencies to focus on growth, customer retention, and delivering exceptional service.

## Ready to Transform Your Business?

Discover how Pathway can revolutionize your operations.

**[BOOK A DEMO WITH PATHWAY TODAY!](#)**

Learn more about Heath Crawford: <https://www.heathcrawford.co.uk/>