

How Carlson & Associates Accelerates Client Value and Retention with Mineral

Carlson & Associates is an independent, full-service insurance agency based in Gig Harbor, Washington, providing individuals and businesses in the Pacific Northwest with the professional, personalized service policyholders appreciate and trust. In a competitive industry like insurance, Carlson & Associates prides itself on providing value-added services, from employee benefits packages to different types of personal insurance, that attract and retain clients. To support this initiative, Carlson & Associates added Mineral to its offering — and its value quickly became evident.

“Many of our commercial clients don’t have dedicated human resource staff, so they lack easy access to accurate information regarding issues like benefits, risk management, employment law, and compliance,” explains Kirsten Conrad, Principal Partner at Carlson & Associates. “Our agency wanted to fill the gap for these clients, providing them with an assortment of resources they can use to better manage employment risks.”

Company

Carlson & Associates

Challenge

Faced with a highly competitive marketplace, the agency wanted to distinguish its offering and add value for its commercial insurance clients from other competitors.

Key Solutions

- Create and maintain complete employee handbooks for clients through Smart Employee Handbook
- Ensure compliance with changing regulations using HR Compliance Library and Workforce Harassment Prevention
- Empower clients with comprehensive HR resources through Core Courses and HR Compliance Library

Results

- Agency is differentiating its offering, retaining more clients and winning new ones
- Clients are saving money by using Mineral resources rather than outsourcing HR tasks
- Up-to-date information about changing labor laws during pandemic proved invaluable for clients and the agency



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Principal Partner, Carlson & Associates

The Right Solution at the Right Price

Conrad says the firm looked at multiple options before deciding on Mineral. “Many were too expensive and too complex,” she says. “But then I spoke with another broker who was using Mineral and recommended it. We liked that Mineral is a comprehensive offering multiple products that combine content, templates, a searchable knowledgebase, a course library, and live advisors.”

Carlson & Associates rolled out Mineral in mid-2020, and Conrad believes the COVID-19 pandemic accelerated its adoption throughout the agency’s clients. “Overnight, they were facing some very complex, fast-changing labor rules and regulations. They learned that they could turn to Mineral for up-to-date answers to their questions and even practical information like signage and notification guidelines. Mineral turned into a valuable resource very quickly.”

In addition to providing Mineral to its clients, Carlson & Associates benefits from using the solution internally. “We had a small COVID outbreak in our office and used the resources in HR Compliance Library to quickly find employee communication documents we could send out to update our staff,” explains Conrad. “I also use the extensive content library to search for answers to client questions.”



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Adding Value to Client Relationships

Conrad and her team often host online meetings to introduce the various benefits of Mineral to new clients. The discussion around how Mineral can help their business gives them a unique opportunity to learn about their clients' concerns and priorities. "It's a nice way to connect with our clients," says Conrad. "It helps us understand what their businesses need that our firm can help provide." Other clients are exploring Mineral on their own, through webinars on current compliance trends and enrolling in online courses provided in the Core Courses learning management system.

As an added benefit, Conrad offers the Smart Employee Handbook to her clients, a tool that allows employers to easily create complete employee handbooks and keeps them updated as legislation changes. "It's one of the most popular features with many of our clients," says Conrad. "One of our clients was paying an outsourced HR firm \$300 an hour to develop and maintain their employee handbook. Now they have that benefit at no cost. Mineral is saving them a lot of money."

The firm's business clients are also using the HR Compliance Library and Workplace Harassment Prevention to identify gaps and potential weaknesses in their HR programs and policies as well as receive recommendations for how to stay compliant.

A Competitive Advantage

Carlson & Associates operates in a busy, competitive marketplace. The agency's clients continually receive communications from larger insurance brokerage firms seeking to win their business. Thanks to Mineral, though, Carlson & Associates increased its client retention rates in 2020.

Conrad is confident that the agency's investment in Mineral is paying off. "Mineral is definitely paying for itself," she says. "And we expect that it will deliver an ever-increasing return on investment as it helps us retain existing accounts and win new ones."

Mineral enhances the agency's services, making Carlson & Associates a valuable resource for clients. "We attract new business by promoting our partnership with Mineral," concludes Conrad. "Including Mineral as part of our offering to employers sets us apart. Our clients look to us for more than insurance. We are trusted business partners and a source of valuable information that helps them reduce risk and improve HR-related tasks and processes."



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Retain and engage your clients with a partnership with Mineral.

Contact the Mineral team to learn more.

About Mineral

Trusted by more than 500,000 companies, Mineral is the HR and compliance leader for growing businesses. Mineral's proactive solutions take the guesswork out of HR and compliance, giving clients peace of mind. The company combines data, technology, and human expertise to drive innovation and personalized guidance. Mineral's network of partnerships has enabled it to build the largest HR community in the U.S. Mineral was formerly known as the combined entity of ThinkHR and Mammoth. For more information, visit trustmineral.com.

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