

Hartland Agency's "Client Service Fanatics" Elevate Customer Care

At RC Insurance Services, "good" isn't good enough when it comes to customer care.

"We are client service fanatics," says **Jeff Cardenas**, Principal at the Hartland, Wisconsin-based agency.

"Client service fanatics are people whose number one goal is to make life easier for clients," he explains. "They are people who have energy and attitude, who make sure things are done right the first time, who keep things simple and straightforward, and who do whatever it takes to service clients."

That fanatical service focus stems from the agency's core values, which focus on the well-being of its staff.

"Taking care of our associates is an important distinction we make compared to other agencies," says agency Principal **Dimas Ocampo**. "We believe it's our job as a business to focus on our associates, and our associates know it's their job to take care of our clients."

As a family enterprise, RC Insurance Services has worked to build an environment that is supportive, creative, and fun. The result is a close-knit staff where associates enjoy a strong bond. "We have a high sense of loyalty and a strong level of caring and interaction among all our associates," Cardenas says.

RC Insurance celebrates the successes of its associates with regular recognition of individual and team accomplishments and accolades received from clients. The agency also isn't afraid to mix a little friendly competition into the environment as well, such as a recent Nintendo Wii tournament.

"Events like that are a chance to mix people from different departments who might not normally have a lot of communication with each other. It's a good team-building exercise," Ocampo says.



Dimas Ocampo and Jeff Cardenas

Changes and Challenges

The firm was founded in 1978 by Jeff's parents, **Bob** and **Terri Cardenas**. Dimas joined in 2001; Jeff in 2002. A well-planned business succession strategy assisted RC Insurance Services in an ownership transition after Bob's sudden passing in 2009.

RC Insurance Services has achieved strong growth over the past 10 years and is on pace to at least triple its volume with *ACUITY* in just two years. The management team has been intently focused on growing all four of the agency's focus areas: commercial lines, personal lines, employee benefits, and financial services.

In a strong growth mode, the agency's biggest challenge is finding people who match its sales and service attitude. "We interview 12 months out of the year. It is a constant process to be sure we have people on board who share our vision for customer care," says Cardenas.

RC Insurance Services plans for strategic growth to come both organically and through acquisition.

"We're excited for the opportunity to partner with other agencies," Ocampo explains. "There are a lot of agencies out there where internal perpetuation may not be an option but don't want to sell to a mega agency. We'd like to be a resource for them."

While growth is necessary for any agency, Cardenas and Ocampo stress that quality, not quantity, is their ultimate measure of success. They are going to achieve that goal by being fanatical about client service and remaining focused on what has fueled their success over the past 30-plus years.

"Our core belief is that God and family come first, then business," Cardenas says. "If you keep those priorities straight, everything falls in line." ●

