

Gillman Insurance Problem Solvers

Company snapshot

Gillman Insurance Problem Solvers has been serving the metro Atlanta community since 1993. Their mission is to solve problems, focusing specifically on the insurance needs of their customers. The small commercial and personal lines agency has been a Best Practices Agency for six years running and landed themselves as a Best Practices Top Performer in their revenue size category in 2020.

Top Best Practices operating metrics for Gillman Insurance Problem Solvers

Metric	Rank
Sales Velocity	90%+
Commercial P&C Organic Growth	90%+
Individual L/H/F Organic Growth	90%+
Net Revenue Organic Growth	90%+
Value Creation Calculation	90%+
Pro Forma EBITDA Margin	90%+
Pro Forma Revenue per Employee	90%+

Gillman Insurance Problem Solvers

Vertafore solutions

AMS360

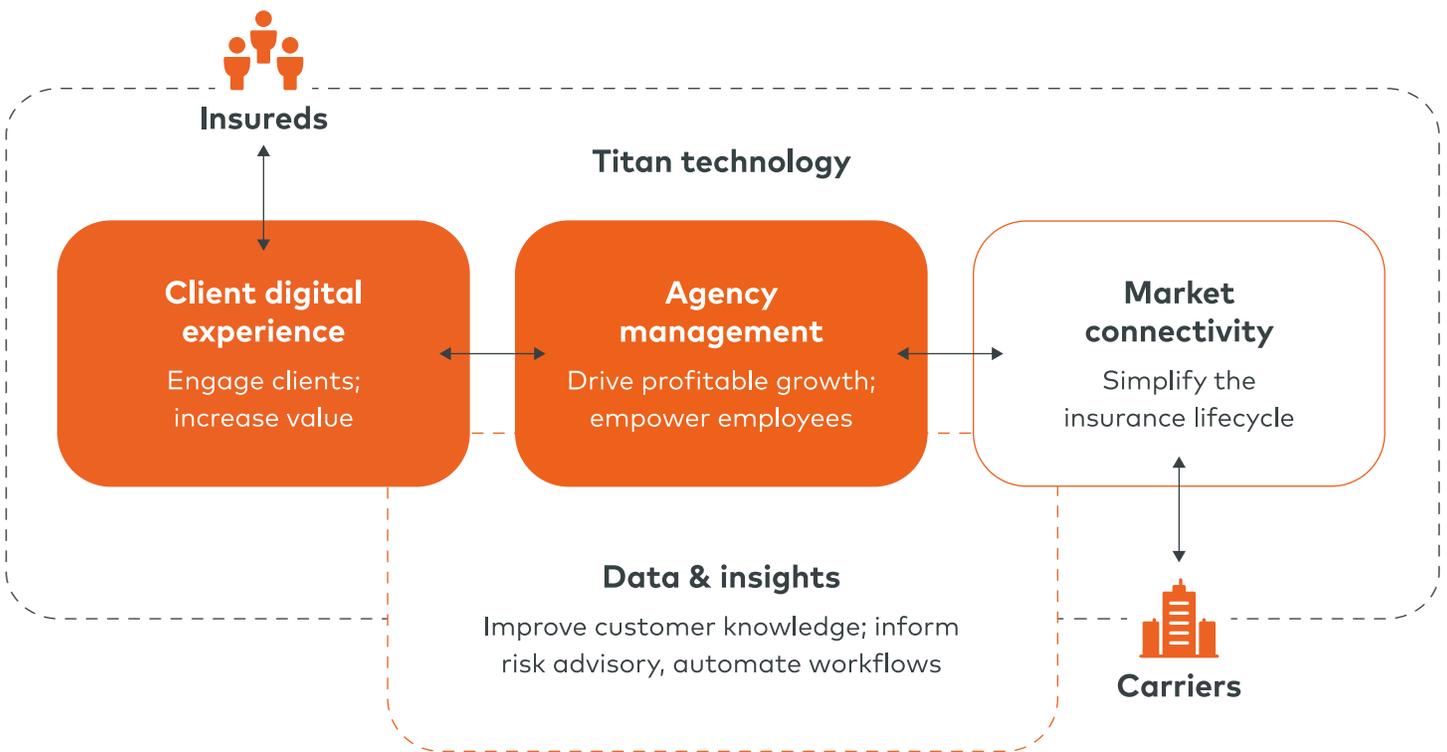
InsurLink

Orange Partner Integrations

Vertafore Client Communications

Proven results

- Achieved Big "I" Best Practices Top Performer in their revenue size category in 2020
- Maintained over \$200,000 in revenue per employee
- Maintained retention rate in the 90th percentile of agencies



Gillman Insurance Problem Solvers is focused on improving their **client digital experience** and **agency management**. As such, they've partnered with Vertafore to to **foster client engagement** and **drive productivity**.

Gillman Insurance Problem Solvers attributes their success to their ability to grow using technology.

Founder and owner Ed Gillman says, "We've come close to doubling our revenue over a six-year period while only having to add one or two folks to the team. People are really important, and so is the environment, culture, and technology they use to do their job."

Vertafore plays a critical role in Gillman Insurance Problem Solvers' ability to automate tasks, increase efficiency, and serve their customers with ease. "We believe that insurance is just something that most people want to check off of their to-do list," Gillman says. "So, we make it easy, seamless, and relatively painless."

Gillman Insurance Problem Solvers uses Vertafore's AMS360 to provide top-notch service when it matters most. "The key is having AMS360 be able to communicate with our customers in an automated fashion," Gillman says. "It allows us to spend less time re-keying data and more time thinking about how we can help service our clients or find new business." Gillman believes not only are his customers better off, but his employees are more productive and happier in the office because of AMS360.



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Ed Gillman,
Problem Solver,
Gillman Insurance Problem Solvers

On top of AMS360, Gillman Insurance Problem Solvers uses Vertafore Orange Partners that integrate with the management system to further enhance their business. Gillman points to Vertafore Client Communications, powered by Rocket Referrals, as one of his favorites for automating his marketing efforts. "The key is to be in front of the prospect or customer when they are ready and interested," Gillman says. Vertafore Client Communications and AMS360 allow Gillman Insurance Problem Solvers to automatically reach out to customers and prospects at the ideal time to increase the chance of closing more business.

Gillman Insurance Problem Solvers also uses Vertafore's InsurLink to impact the customer experience. InsurLink is a customer portal that allows the customer to service themselves, taking the workload off the CSR team and providing fast, reliable service every time. Gillman says, "When I think about how people like to do business, whether it's with Amazon or their bank, they not only want it done, they want it done yesterday. They not only want it in a certain manner or format, they want options."

Gillman Insurance Problem Solvers' customers can download their own auto ID cards, or quickly see their policies on their own. To Gillman, that's a huge value in providing a seamless experience for his customers.

"The golden rule is he who has the gold, rules. And at the end of the day, the customer has the gold. You've got to be able to adapt and be flexible to serve them." This intense focus on the customer has resulted in Gillman Insurance Problem Solvers achieving a revenue per employee of over \$200,000. On top of that, the agency has stellar retention rates that help drive even more revenue.



Innovative solutions for the modern agency

Insurance is evolving: The industry is quickly consolidating, client expectations are growing, and technology is creating new opportunities. The key is staying ahead to remain relevant and profitable. If you're unsure how to move forward in this evolving landscape, Vertafore is here to be your partner and guide you through these changes.

About the Best Practices Study

As a Best Practices Top Performer, Gillman Insurance Problem Solvers has retained its Best Practices status for six years running, becoming a part of an elite group of independent insurance agencies around the United States and earning the additional designation as the highest performing agency in its revenue category. This status comes by participating in the Independent Insurance Agents & Brokers of America (IIABA or Big "I") Best Practices Study group. The annual survey and study of leading independent insurance agencies documents the business practices of the "best" agencies and urges others to adopt similar practices.

Since 1993, the Big "I" and Reagan Consulting, an Atlanta-based management consulting firm, have joined forces to study the country's leading agencies in six revenue categories. The agencies comprising the study groups are selected every third year through a comprehensive nomination and qualifying process and awarded a "Best Practices Agency" designation. The agency was nominated by either an IIABA affiliated state associate or an insurance company and qualified based on its operational excellence.

The selected Best Practices agencies earn the Top Performer designation and retain their status during the three-year cycle by submitting extensive financial and operational data for review each year. This is the second year of the current three-year study cycle, where over 1,000 independent agencies throughout the U.S. were nominated to take part in the annual study in 2019, but only 264 agencies qualified for the honor. To be chosen as a Best Practices Agency, the agency had to be among the 35-45 top-performing agencies in one of six revenue categories.

Disclaimer: The results of this agency depend on a variety of factors and Vertafore makes no representation that the same results can be achieved through implementing the same or similar technology solutions.



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