



Vertafore™

Unleash your potential

Success Story

Beecher Carlson



Beecher Carlson



Angela Ford, Director of Applications, Beecher Carlson

Agency Snapshot

Founded in 1981, Beecher Carlson is an Atlanta, Georgia-based, nationwide risk-management consultancy that's known for its specialized industry expertise, unwavering commitment to customer service and team of outstanding people. This way of doing business has accelerated its industry growth. Today, Beecher Carlson is the 29th largest broker in the U.S., the eighth-largest captive manager and recognized as the fastest-growing brokerage among all risk management brokerages.

Vertafore Solutions

- AMS360®
- BenefitPoint®
- Producer Plus™
- Performance Analyzer®
- PL Rating®
- Sage®
- Sircon®
- WorkSmart™

Results

- Acquisitions are on-boarded to AMS360 within 60 to 90 days, adding more than 250 new users in a five-year period.
- Integration reduces duplicate entry for each system, saving vast amounts of time annually, making the business more successful
- Company experienced unprecedented annual growth within a four-year period, without loss of system performance or needing to split databases.

AMS360 supports Beecher Carlson's massive growth.

Beecher Carlson can never be accused of having an identity crisis. Its success is founded on the philosophy that they can't be all things to all people. Instead, this Atlanta, Georgia-based risk management brokerage specializes in several industry sectors, with a portfolio of clients that includes some of the most respected companies in the world. Beecher Carlson is an innovator, pioneering many of the captive-design concepts in the industry today and they pride themselves on continuing to innovate in the field of insurance and risk management, using a combination of analytics, technology and above all, customer service. Their philosophy is based on putting clients first, providing a consultative approach to insurance and never pushing products—even if that means not making the sale.

This approach has paid off. Beecher Carlson realized unprecedented industry growth over the past four years, with nearly \$100 million in projected income. The company has grown to 500 employees in 30 offices nationwide. They are the 29th largest U.S. broker and the eighth largest captive manager.

When Beecher Carlson set out on this path of expansion, they needed an agency management system and technology tools that could support their level of growth and innovation.

Aggressive Growth. Quick Adoption.

When visionary Beecher Carlson President and CEO Tom Golub set the company on its growth path, he needed a core system for the long term.

"One of our first acquisitions was using AMS360 and had good things to say, so we took a closer look," said Angela Ford, director of applications, Beecher Carlson. "We liked the fact that everything was centralized, that our people could see everything—invoicing, account balances, all the client information—in one system. We knew our middle market would be using the system all day, so we needed performance. Finally, we needed a system that would allow us to bring on our acquisitions quickly and scale with our growth."

AMS360 delivered on all counts. Ford was quickly able to determine that the system had the qualifications they needed to support their business and growth and they haven't looked back since. "Most systems are geared to agencies with one or two producers, not the large numbers we employ." "And, having a system that is customizable is key, because nobody else looks like Beecher," added Beecher Carlson President, Steve Denton.

"We onboard our acquisitions to AMS360 within the first 60 to 90 days, and have had a fantastic experience migrating to one system each time.

“We needed a system that would allow us to bring on our acquisitions quickly and scale with our growth.”

— Angela Ford, Director of Applications, Beecher Carlson

Our Vertafore national account manager is dedicated to us and is our constant point of contact to ensure the acquisition goes smoothly for us. Having a team in place, assigned to my projects is just pleasant as a large customer,” said Ford.

We’ve acquired seven companies so far with AMS360 and don’t have to think twice about it,” added Denton. “We don’t consider it a risk factor.”

Up to Speed and Ready to Grow

With new users regularly coming on board, Beecher Carlson relies on AMS360 to not only manage the massive amounts of data, but also to manage the growing number of users. “We now have about 420 users on the system, with half of those being online 95 percent of the time,” agreed Ford. “And these users are operating off one database, whereas most systems on the market would require a database split, which allows us to keep the high-level, aggregate view of our data that we need,” said Ford.

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The structure of AMS360 complements the customer-centric culture of Beecher Carlson. “Our new employees comment on the fact that they get more options with AMS360. They love the layout of the customer center and are particularly impressed

with the dec page, which gives a quick summary of the full customer relationship in one spot,” said Ford. The interactive dec page also offers quick access to make policy changes and endorsements, which saves them a lot of time.

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A key element for the system to continue to support Beecher’s aggressive strategy is scalability. Vertafore recently completed a scalability test that verified AMS360 can scale to 15,000 users, with no incremental change in performance and without a level-off—a fact that’s particularly important to Denton. “I am confident that AMS360 will support Beecher Carlson’s future growth, and that we can add users without seeing performance suffer,” he said, “We also like the fact that Vertafore has a suite of products, as opposed to just a management system.

Streamlining for Efficiency

Scalability and getting up and running quickly are only part of the story. Beecher Carlson is continuously streamlining and automating operations as it grows. “AMS360 bridges the business pieces together throughout our brokerage; for example, it ties our benefits team together with our P&C team,” said Ford. “Automation is a good thing.

We’re constantly looking for more ways to use AMS360 to be more efficient. We want to push the system to the limit and take advantage of all it has to offer.”

Of particular interest are AMS360 Web Services. “Web Services allows us to take basic core information and push it to the other systems we use, enabling us to write information back and forth. Before, the same customer information had to be added twice,” said Ford.

Ford is excited about using Web Services to integrate the MGA policy issuance system of a new acquisition they recently made. “This will be the first step in our ultimate plan to have all our systems integrate into AMS360 via Web Services. Keeping all our systems and data in synch will bring us immeasurable efficiencies,” said Ford.

Looking forward to the future

The future of Beecher Carlson continues to be bright. “We feel we’re in a partnership that is definitely moving in the right direction in the industry. Vertafore offers the tools that we as brokers need and also goes beyond by making all the tools work together. We’re excited about where we’re going together,” said Ford.

As Beecher Carlson continues its aggressive growth strategy, Vertafore will be there with the technology to support the innovation. “Technology is critical to our growth,” said Denton. “Vertafore is a great partner. They understand how we operate and are here to support us in the long term.”



Vertafore™

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Vertafore is the leading provider of software and information to the insurance distribution channel, including independent agents, brokers, MGAs, carriers and reinsurers. Vertafore leverages a unique industry presence to deliver meaningful solutions—powerful technology, critical information and robust insights to help organizations effectively respond to business challenges and capture new opportunities. Vertafore solutions are helping more than 17,000 customers and 500,000 end users gain a competitive advantage to accelerate their business performance.

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