



**Vertafore™**

Unleash your potential

**Success Story**

# SilverStone Group



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## Integrated Vertafore® solutions bring new efficiency to SilverStone Group.

Like most great ideas, SilverStone Group had some very humble beginnings. What began as a one-room, two-person agency is now a \$30 million, five-office firm that provides risk management, employee benefits, private client services and consulting services—creating a one-stop shop for all its clients' resource management needs.

For an agency this size, efficiency is key to profitability. "In this economy, every company is looking for ways to do more with less. We wanted to find a way to work faster and increase productivity without adding personnel. So, about four years ago, we purchased the Vertafore content management system, ImageRight®, with the goal of getting rid of all the paper and streamlining our processes," explained Barb Dale, Principal and Property & Casualty Operations Manager for SilverStone Group. "We were really impressed with the way the Vertafore staff came in, learned what we did, challenged us to make some changes to become more efficient and helped us put workflows in place."

The efficiency improved, but Dale knew they could do more. "We were so impressed with ImageRight, that, when our Vertafore representative suggested we take a look at WorkSmart for workflow, we did—and that got us looking at AMS360," she said. "I knew then that, if we could get all our systems under one, integrated family of products that could speak to each other, we could be so much more efficient—we could eliminate all of this duplication of data entry. I thought, 'why are we doing things the way we're doing them when integration could make everything so much easier?'"

At the time, SilverStone Group was using Applied's TAM system. Dale contacted them about building an interface for WorkSmart, but the answer was 'no go.' "To meet our vision of a more efficient, integrated environment, we had to pull the plug and make the change to AMS360 along with WorkSmart," she said. "We had looked at all the systems, we had seen the integration and we knew the value it would bring. The way I look at it, Vertafore has a variety of products that work together like one product. That was going to give us a benefit in terms of efficiency and customer service. I could see that integration and streamlined workflow becoming a real competitive advantage for us."



*Barb Dale, Principal and Property & Casualty Operations Manager, SilverStone Group*

### Agency Snapshot

In 1945, SilverStone Group's founder, H.H. "Red" Nelson, started his insurance business in a one-room, two-person office in Council Bluffs, Iowa. Today, this firm, still family owned, has grown into a five-office resource management company with 200 employees, 2,600 employer clients and 2,500 personal lines clients worldwide. It is now the 78th largest brokerage firm in the U.S.

### Vertafore Solutions

- AMS360®
- WorkSmart™

### Benefits

- Integrated workflow, imaging and management system eliminates duplicate data entry
- Submissions can be tracked throughout the workflow process
- Looking forward to integrating all departments with Vertafore's help

### Proven Results

- Projected 20 percent improvement in efficiency
- Ability to grow without adding personnel
- Improved reporting and data access
- Enhanced customer service

## “We wanted to find a way to work faster and increase productivity without adding personnel.”

— Barb Dale, Principal and Property & Casualty Operations Manager, SilverStone Group

### A Change for the Better— In Many Ways

“Our Vertafore consultant did a great job of working out the workflow with us. In the first two weeks, we made changes and the responsiveness of Vertafore is incredible,” Dale said. “They listen to us, they challenge us, they were, and are, 100 percent dedicated to our success—they are a really great partner.”

Although SilverStone Group has only been on AMS360 and WorkSmart for a short time, it is already seeing a positive impact. “The impact on submission tracking is huge. Everything is in the system, so, if a customer calls, anyone can pull up the information and answer a question. We know where everything is within the workflow process. And now, our staff can access that information from any VPN connection anywhere in the world—so we’re more mobile, more streamlined and better able to serve our customers,” said Dale.

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Mail costs have dramatically decreased and the efficiency has improved. “Our carriers love our electronic submissions and we do, too,” Dale said. “We can get things done quicker. While we’re on the phone with a carrier or client, we can pull up the submission and walk them

through it—and it’s done. We’re going to be able to grow and not add staff because integration enables us to work a lot smarter.”

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Prior to the integrated Vertafore solution, the different departments within SilverStone Group might all be calling on the same prospect or client at different times. “We are the one-stop shop with multiple areas of business. But, one of our CEO’s biggest frustrations was the fact that we’d have different department heads having to ask each other about clients. One might call on a client to find out another person from a different department just called on that client a few days before,” Dale said. “Now, with Vertafore’s help we are looking to integrate our other department systems with each other.”

### Positioned for Efficiency; Poised for Growth

Dale and SilverStone Group’s staff have already seen real benefits. “With WorkSmart, any employee—even someone who is brand new—can walk through our workflow and do his or her job in the most efficient way possible, based on our procedures,” she said. “I believe that, in time, WorkSmart and our AMS360 integration will make us 20 percent more efficient.”

She also is confident that AMS360 can support SilverStone Group’s growth from an operational standpoint, as well. “We definitely can keep growing with AMS360—it doesn’t limit us. For example, we can add more than 99 policies on an account—something that was a workaround on our old system,” Dale said. “And, because AMS360 is SQL based, it opens a lot of possibilities. We know we can pull the reports we need to plan strategy. With our other system, we were so frustrated because we knew the data was in there, but we just couldn’t get to it.”

It all adds up to a clear competitive advantage. “I think a lot of agencies focus on scanning and imaging, but haven’t seen the light about integration and workflow like we have with AMS360 and WorkSmart—and from a competitive standpoint, I don’t know if I should tell them or not,” Dale said, smiling.

“When the economy is down and profits are shrinking, agencies have to change the way they do things to be more profitable—and you do that through automation. Today, it’s a competitive advantage. But, eventually, you’re not even going to be in the game without it.”



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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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