

Real-world agency results

Evolve MGA automates workflows, boosts productivity 60% with Veruna



A true industry innovator, Evolve MGA is one of the nation’s largest specialists in cyber insurance, serving thousands of agencies across the U.S. In supporting this unique line of business for retail brokers on a massive scale, Evolve needed custom sales, marketing, and management tools, especially given the company’s aggressive growth goals.

Agency Snapshot

Headquarters: San Rafael, CA

Locations: 12

Founded: 2015

Focus: Cyber Insurance

Challenge

Anthony Howley, Evolve COO, said the company struggled for years to get their legacy AMS to work the way their business required.

“When we tried to customize the system things would break,” Howley said. “There was very little support, and really poor reporting.”

These shortfalls were more than a source of frustration, Howley explained. Overcoming them was critical to the company’s success.

“We needed customization to manage our business better, make our team more efficient, and provide better, more accurate service to our customers.”

Solution

After researching alternatives, Howley and team selected Veruna because it is natively built on Salesforce, highly customizable, and came with the enthusiastic recommendation of Evolve’s own agency customers.

“It was important to go with a platform dedicated to the insurance industry,” Howley said. “Customizing Salesforce by ourselves would have required hiring developers and taken twice as long. With Veruna we had a foundation that was 70% everything that we needed, even with all the customization we wanted.”



Business Impact

After implementing Veruna, Evolve saw a positive impact “right out of the gate,” Howley said. “The system automates tasks for our team and has driven efficiencies way up. Our underwriters are able to handle 60% more renewals per month. Veruna eliminates a lot of the busy work.”

In addition, Howley said, “there is a much higher level of accuracy. There is no human error.”

Even more exciting is the impact Howley anticipates as Evolve continues to customize and optimize Veruna over time. “It is a system where you know that you don’t have limitations,” he said. “With other systems you are basically handcuffed. They have little to no ability to customize to the needs of your business.”

“You need to leverage technology to grow your business today,” he added. “You are in safe hands with Veruna.”

“Legacy systems just barely cut it, but that is not good enough anymore. They don’t unlock the potential of what you can do with your business like Veruna.”

Anthony Howley,
Chief Operating Officer
Evolve MGA

Could your agency benefit from a solution that makes customization simple, automates workflows, improves efficiency, and drives growth? If so, you owe it yourself to check out Veruna today!

www.veruna.com

Get In Touch!

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