Real-world agency results

The Paladin Group drives 600% revenue growth with Veruna

The PALADIN GROUP

As a young, independent insurance agency serving personal, business and commercial auto clients, The Paladin Group needed to establish a solid foundation for long-term growth. At the same time, agency leadership, including founder and president Corey Schatz, had to stay focused on immediate opportunities to win—and keep—customers.

Agency Snapshot

Headquarters: Cedar Falls, IA
Locations: 3
Founded: 2016
Focus: Commercial Auto, Business, Personal

Challenge

Choosing a major traditional insurance agency management system (AMS) seemed like a safe choice for Schatz and his team, but they quickly ran into problems trying to get this legacy platform to reflect the realities of modern agency operations, let alone their unique business.
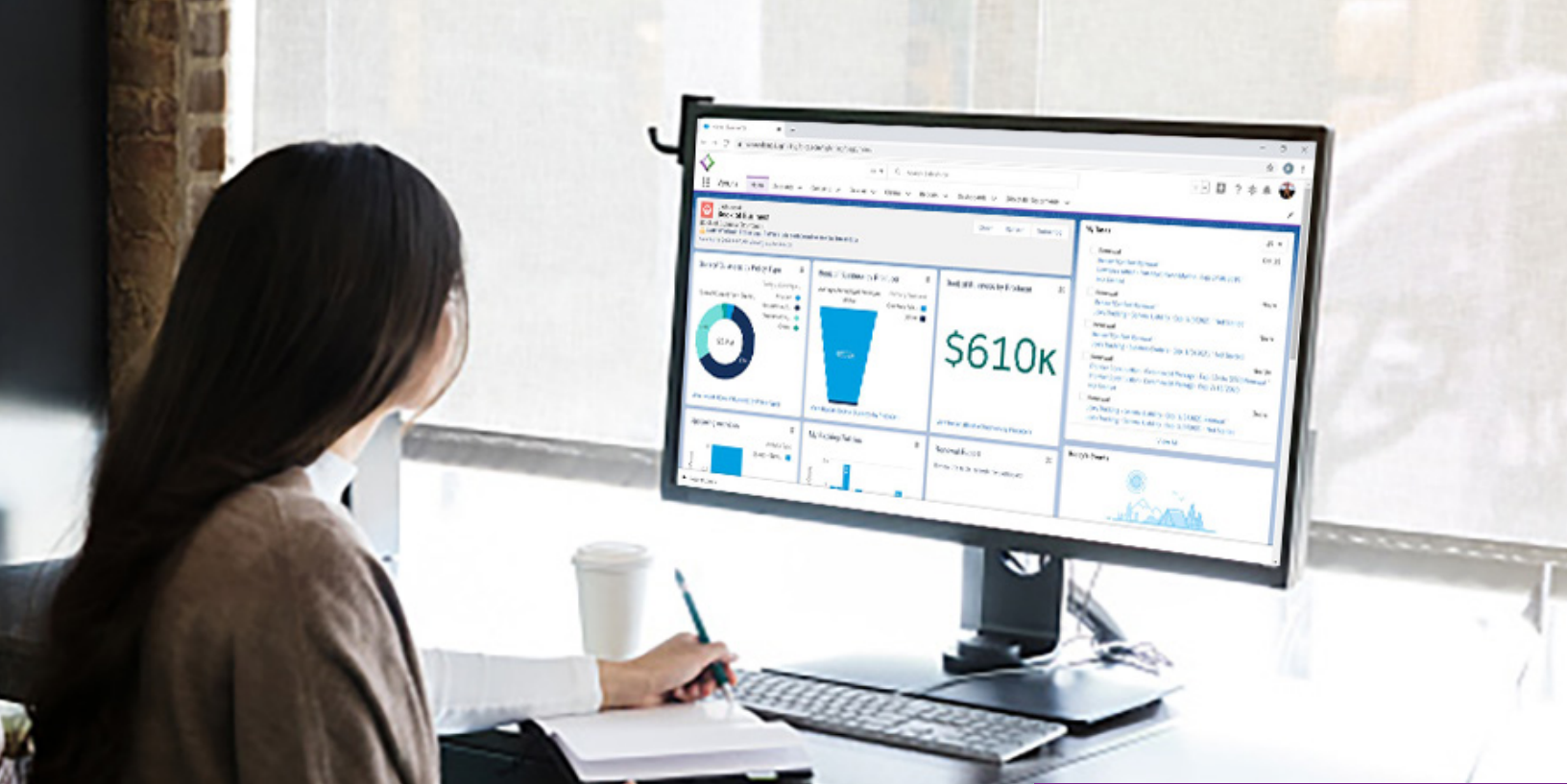
"It was a one-size-fits-all system, with no ability to customize," Schatz said. "That limits your ability to understand your business, it takes up a lot of time with your team, and it's inefficient.

Solution

Searching for a better solution, Schatz selected Veruna in part because it is built natively on the Salesforce platform. The Paladin Group already used Salesforce and had even tried customizing it to fit an insurance agency model better, but Schatz said, "that was a disaster."

In sharp contrast to both the legacy AMS and their own in-house efforts, he said, "Veruna out-of-the-box came with 90 percent of what we needed, such as Accord integration.

"The implementation process was so quick and easy I don't really remember it," Schatz added. "Other software implementations have been a nightmare, but this was a very simple, very easy transition for us."

Business Impact

Once the agency had Veruna in place, the game-changing benefits of using a truly modern AMS quickly became obvious in the company's bottom line.

"We grew our revenues 600% in the first year of having Veruna," Schatz said, "and we have line of sight to 300% growth in the second year." In fact, he added, "Everything is way up. Not just revenue, but client retention, client satisfaction, and employee retention as well."

Schatz attributes this game-changing impact to many benefits of the software. "The workflows are great!" he said. "All of the information is there from start to finish. I can see all of our conversion rates; I can see opportunities that I couldn't see before. The handoff from Sales to Service is seamless, and the client experience just flows a whole lot better. We were able to automate and do things with our AMS that traditional AMS systems just can't do."

> *"It allows you to **know and understand your business better.** We can use the system to **grow our business.**"*
>
> Corey Schatz,
> Founder and President
> The Paladin Group

Could your agency benefit from a solution that saves time, streamlines workflows, and enables 6x agency growth across multiple key metrics? If so, you owe it yourself to check out Veruna today!

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