



# Lockton Companies, LLC

## Company snapshot

In 1966, Lockton opened its doors in Kansas City, MO. Today, the company has grown from a one-person, one-office organization into the world's largest privately owned, independent insurance brokerage firm with 4,450 associates and 61 offices throughout the United States, Europe, Latin America, the Middle East and Asia. The company's fierce commitment to private ownership ensures each office maintains its own culture and that its associates are fully focused on the needs of their clients, not shareholders. Lockton provides insurance, risk management and employee benefits products.

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G. Bradley Villers,

*Executive Vice President and Director  
of Financial Services, Lockton-Houston*

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## Vertafore® Solutions: ImageRight®

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### Proven results:

- Reduced storage costs and required file space
- Quicker file retrieval for faster client service
- Increased associate productivity and shortened renewal steps

Lockton's Houston office eliminates the paper chase with ImageRight®.

Lockton began in 1966 with one man who had a vision of what a brokerage firm should be, with a focus on service that attracted clients and insurance professionals alike. Today, it is one of the world's largest privately owned, independent insurance brokerage firms with a 61-location global presence and a client list that includes some of the most well known brands around.

Lockton's Houston office mirrors that original entrepreneurial spirit. This location opened in 2001, with eight seasoned professionals from other brokerage firms, focused on complex risk management clients. By 2013, the Houston office grew to the third largest property and casualty office for Lockton in the U.S., with 245 associates and no signs of slowing down.

"Our competitive advantage is our structure and our people. We're not publicly traded, which enables us to fully focus on our clients," explained G. Bradley (Brad) Villers, executive vice president and director of financial services for Lockton-Houston. "The people in our office are also outstanding. When we started, we recruited the best individuals in each specific area, and continue to do that today."

At the same time, the firm stays true to its original identity and culture, so it's been able to grow without losing the very qualities that fueled its initial success.

## Files, Files, and More Files

As the Houston office expanded, its paper files grew exponentially.

"We knew we were moving a lot of paper, but the epiphany came when I was meeting with the COO of another agency to talk about getting into a specific line of business. Completely off topic, out-of-the-blue, he says, 'I'm shocked you still use paper files and not document management,'" Villers said.

Villers and the rest of the management team decided to evaluate the need.

"When we stopped and looked at the situation, we had to ask, 'why are our valuable associates coming in on Saturday to print, hole-punch, and file emails? Does that add customer value?'" explained Stacy Seaberg, CRM, executive vice president, risk management and casualty for Lockton-Houston.

The problem was not just the inefficiency of getting those emails, policies, and correspondence into the correct paper files. Retrieving those files could be challenging, as well.

"For example, if an attorney called for a certified copy of an endorsement from an expired policy, we'd have to identify which box it was in, call the storage company, then have them retrieve and send us that box," Seaberg said. "Then, we'd get the file we needed from that box, make a copy of the endorsement, put the endorsement back in the file, the file back in the box, and then send the box back."

Even if the file was still on site, there was no guarantee it was in the right spot, and not sitting on another associate's desk. In short, the office had simply outgrown its paper-based workflows.

"Brad [Villers] and I were here when this was a 30-person office that took up one-half of one floor of this building. Today, our 245 associates populate five floors," Seaberg said. "We needed policies scanned, emails attached, and everything securely stored in one centralized place, so associates could access the files they needed from their desk, or from a remote location."

And so the search for the right content management solution began.

"We went through a very involved due diligence process, and ultimately, Vertafore's ImageRight was the one that stood out... We liked the fact that ImageRight was created for the insurance sector, and not a generic document management system. It was clear that the folks at Vertafore 'got' what we do, because they're in the insurance industry, too."

**G. Bradley Villers**, *Executive Vice President and Director of Financial Services, Lockton-Houston*

## Specifically Created for the Insurance Industry

Lockton-Houston's leadership also liked the fact that ImageRight is an end-to-end solution that integrates with Outlook for easy email attachments, as well as to BenefitPoint® and its management system. It's also easy to search, and intuitive to use—important for a company moving from a shared drive into visible space on a paperless system.

But, for Lockton-Houston's leadership, working with a company that could adapt the solution to the agency's unique needs was equally as important as the technology itself.

"I think it's important to note that the Vertafore team spent a lot of time understanding how we as an office operate... And, they understood that, because of our culture, we wanted to set things up a little differently—like customize folder structures for our individual teams."

**G. Bradley Villers**, *Executive Vice President and Director of Financial Services, Lockton-Houston*

Each of Lockton-Houston's 10 teams serve different types of clients, and do so in the way that makes the most sense for that area. So, to standardize a folder structure or workflow company-wide would have created mayhem.

"Our property team needs things set up differently and works differently than our non-energy casualty, and on down the line. If we lost that we'd also lose our culture, which is critical to our success," Villers said. "So, we needed the efficiencies of content management, but had to provide it in a way that wouldn't disrupt our unique ways of doing business."

After getting input from the various teams, the internal implementation team worked with Vertafore specialists to customize those folder structures.

"We were making a big change by eliminating paper. By getting our team's buy-in on file structure, and continually communicating as we went along, we engaged our associates in the process," Villers said.

Equally important was the approach to training.

"Angela, our Vertafore training executive, gave us good insight into what our approach should be," Villers said. "Instead of training a room full of associates, we did training in smaller groups. We'd train a group from Monday through Friday, then go live with that team on the following Monday, with Vertafore personnel on site to follow up. The combination of those two factors was key."



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**G. Bradley Villers,**

*Executive Vice President and  
Director of Financial Services,  
Lockton-Houston*



## Positioned for a More Efficient Future

Although Lockton-Houston hasn't used ImageRight long enough to measure tangible impact, its leadership has already seen some real signs of success.

"We knew that we made the right decision when our most valuable associates came up to us and said, 'Wow, ImageRight has really made a difference,'" Villers said.

In fact, the day of this case study interview was the same date the location shut down its shared drive—which, happily, ended up being a non-event. Or as Seaberg said, "We haven't heard any shrieking down the halls."

In the end, Lockton-Houston got a content management solution that will deliver future productivity gains, without adjusting the unique way in which each team likes to operate. Its leaders gained a partner who not only listened, but responded.

"From the beginning of the process until now, not one single time did we use Vertafore's off-the-shelf offering. Everything was customized, different, continually tweaked—and the Vertafore team bent over backwards to do it," Seaberg said. "We're in the service business ourselves, so we get what it takes to deliver that level of service—and appreciate it."

*The most exciting part?* This success story will only get bigger from here.

Contact Us

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