

WORKFORCE DEVELOPMENT AND SALES GROWTH IN THE CLOUD **USHER IN THE FUTURE FOR A NATIONAL INSURANCE BROKER**



FAST FACTS

BUSINESS UNDERWRITERS ASSOCIATES AND SIKICH

Length of time to transition from traditional workplace with on-premises technology to cloud-powered anytime, anywhere work environment: 4 months

SIKICH DELIVERS:

Software:

- [Microsoft 365 Business Premium](#)
- [Microsoft Teams](#)
- [Teams Phone System](#)
- [Microsoft SharePoint](#)
- Microsoft Azure AD
- [Microsoft Dynamics 365 Sales](#)

Services:

- vCIO consulting
- [IT Managed Services](#)
- Transition of on-premises resources to the cloud
- Device distribution to employees

Benefits:

- Anytime, anywhere workforce empowerment
- Ability to recruit and onboard talent anywhere in the U.S.
- Business growth through sales
- Full visibility of employee activities
- Everyday IT support to improve productivity and return time to executives
- Effective long-term technology strategy

With assistance from Sikich, Business Underwriters Associates (BUA) created a modern digital work environment that brings applications and information securely within easy reach of team members anywhere.

On a cloud-based Microsoft technology platform, the company recruits and empowers talented people wherever they choose to work. Acting on new sales opportunities resulting from its wider reach, BUA has created new sales roles in the organization. Sikich IT managed services and a Sikich virtual CIO deliver strategic consulting, make sure employees have ready-to-go laptops, and provide BUA with complete IT support.

Founded in 1979 and based in Akron, BUA is Ohio's largest full-service, wholesale brokerage general agency, serving thousands of insurance professionals and financial advisors across the U.S. Jack Wright, President and CEO of BUA, explains, "Our job is to broker the case on behalf of the client and our actual customers, the advisor of the client. What makes us unique is our ability to evaluate insurance risks and package those applications for the insurance carrier, negotiating the best price for the client."

The effectiveness of BUA's work on behalf of clients depends on highly trained specialists who delve into complex, lengthy medical and financial records and summarize them in such a way that an underwriter at an insurance company can present an advantageous offer to a client. It's business-critical for BUA to recruit and retain talented people who can deliver the company's services. Jim LaFleur, Vice President at BUA, says, "As we continued to evolve, we also realized that, to really expand our business and to attract and retain the best employees to help us grow, we would need to look outside of the local talent pool in northeast Ohio."

CREATING A NEW DIGITAL WORKPLACE

Those team members also need to have the right tools to do their work and remain connected to their colleagues and managers. However, technology in use at BUA was not suited for hybrid and remote working, hard for employees to use, and expensive to maintain. As their main productivity tools, team members depended on a hosted remote desktop solution with Microsoft Office running over Microsoft Remote Desktop Protocol and a legacy, on-premises phone system. Without an IT department of its own, BUA relied on managed services. The provider was a strong proponent of on-premises technology that required users to reach the company's digital resources through a balky VPN.

BUA initially approached its technology modernization for the workforce with a focus on the phone system as a key productivity tool. Company leaders connected with Sikich when they looked for a suitable technology partner. The collaborative experience was positive and productive from the very beginning. "We were very impressed by the professionalism and knowledge that were brought to us by Sikich," LaFleur says. "They were very helpful in helping us determine which were the right products for the moment and which weren't quite as right for us to implement. Anybody can just sell you something, but for them to actually take the time and get to understand how we do business and then come back with a well thought out platform for us to review—we found that exceptional."

"We were very impressed by the professionalism and knowledge that were brought to us by Sikich. Anybody can just sell you something, but for them to actually take the time and get to understand how we do business and then come back with a well thought out platform for us to review—we found that exceptional."

JIM LAFLEUR

Vice President, Business Underwriters Associates



WORKFORCE DEVELOPMENT AND SALES GROWTH IN THE CLOUD

"In just four short months, Sikich helped us transform to become completely confident and comfortable with remote working."

JIM LAFLEUR
Vice President,
Business Underwriters Associates



"The technology modernization managed by Sikich will deliver on one of our most critical metrics—sales growth."

JACK WRIGHT
President and CEO,
Business Underwriters Associates

SERVICES DELIVER EXPERT, EFFICIENT IT MANAGEMENT

In conversation with Sikich consultants, the project scope shifted to a comprehensive technology refresh comprising telephony and other solutions, backed by strategic consulting from a [virtual CIO](#) (vCIO) and ongoing support through [IT Managed Services](#). "The reason that we chose to use managed services with Sikich is because we needed that back office technology support," Wright says. "We do not have anyone on staff to provide those activities and those services to our employees. We want to outsource that. They're perfect for that."

Key to BUA's technology modernization was the adoption of cloud technology to make applications and data securely available to employees anywhere, anytime. Sikich deployed several productivity, collaboration, and communications software applications such as [Microsoft 365 Business Premium](#) and [Microsoft Teams. Teams Phone System](#) (at the time still called Microsoft Phone System) became BUA's cloud-based telephony solution. Sikich transitioned on-premises servers to Teams and [Microsoft SharePoint](#), and also implemented Microsoft Azure AD to manage user identities and access in the cloud. To enable secure, efficient management of devices, software provisioning, and updates, Sikich deployed Microsoft Endpoint Manager. The consultants relied on the Sikich QuickStart methodology to perform a fast, robust Teams deployment that incorporates standardized, best practice-based layouts and configurations.

RAPID EMPLOYEE ADOPTION OF THE NEW PRODUCTIVITY TOOLS

In their new, intuitive software environment, users could explore and quickly become comfortable with Teams capabilities. LaFleur says, "The implementation went very smoothly. Our employees adopted the system, which is not always the easiest thing to do, but they adopted it very quickly. The introduction of the Microsoft platform including Teams Phone System allowed us to provide a unified communications platform that also gave management good insight into what employees were doing."

By collaborating with an organization of experts to stand up its cloud productivity platform, BUA gained the ability to elevate workforce development and enablement for the next level of the company's growth. "In just four short months, Sikich helped us transform to become completely confident and comfortable with remote working," LaFleur comments.

"Moving to this system allowed us to expand our talent base from the greater Akron, Ohio, area to all over the country. We would never have been able to do that without having a system that would allow us to basically ship them a laptop and they're up and running in 24 hours."

JACK WRIGHT
President and CEO, Business Underwriters Associates

GROWING THE TEAM ACROSS THE COUNTRY

BUA found that it could recruit and hire new team members anywhere in the U.S. "Moving to this system allowed us to expand our talent base from the greater Akron, Ohio, area to all over the country," says Wright. "We would never have been able to do that without having a system that would allow us to basically ship them a laptop and they're up and running in 24 hours. We've been able to hire new staff, people who previously worked at large enterprises, and our new technology compares very well to what they are used to."

Sikich replaced two thirds of BUA's laptop fleet with new devices and shipped them to employees, working with a hardware distribution partner. The remaining devices were reassigned. The consultants installed Windows Autopilot on all new employee laptops, thereby making it possible to have applications configured properly as soon as users sign in to their new devices.



WORKFORCE DEVELOPMENT AND SALES GROWTH IN THE CLOUD

"In the past, when somebody had a computer issue, they called me. Now they call Sikich, which freed up my time to do the things that I need to do to keep the business moving and growing,"

JIM LAFLEUR

Vice President,
Business Underwriters Associates

HEALTHY ROI WITH TIME SAVED, RELIABLE TECHNOLOGY—AND SALES GROWTH

BUA decided to extend its technology modernization to drive business growth and implement [Microsoft Dynamics 365 Sales](#). The company also began hiring sales associates for the first time in its history. Wright remarks, "The technology modernization managed by Sikich will deliver on one of our most critical metrics—sales growth."

It was important for BUA to accurately assess the ROI and other outcomes of the Sikich engagement. Productive time was an important ROI metric. LaFleur explains, "Downtime for employees has been nonexistent since the transition. The system has been incredibly stable, which has kept our employees working. Before, fixing an issue may have taken time away from their daily production, which goes right against the bottom line." Collaborating with Sikich also helped LaFleur find more time in his day. "In the past, when somebody had a computer issue, they called me. Now they call Sikich, which freed up my time to do the things that I need to do to keep the business moving and growing," he adds.

CREATING TOMORROW'S CUSTOMER EXPERIENCE WITHOUT EVERYDAY DISTRACTIONS

BUA has found that no off-the shelf customer relationship management (CRM) software fully suits its industry and requirements. In a continuing project, BUA collaborates with Sikich developers and consultants to create a CRM system that truly fits the company's processes. Built on a Microsoft Dynamics 365 foundation, this solution will close an important capabilities gap for BUA.

At the same time, BUA continues to work productively and achieve growth on its Microsoft platform. Sikich IT managed services, everyday support from the [Sikich Network Operations Center](#), and the Sikich vCIO have become integral components of the company's business culture. "Working with Sikich for the support of our system and with the vCIO has been an excellent experience so far," LaFleur says. "The Network Operations Center has been extremely responsive to the needs of our employees by answering questions, helping them better understand some of the products that we've integrated, and providing them with the resources to make sure that their systems are running optimally."

STRATEGIC CONSULTING DRIVES CONTINUING BUSINESS EVOLUTION

Wright points out, "The quarterly meetings that we have with our vCIO have been very good for us to figure out what our next technology spend should be and how we should be thinking about the evolution of our system, because we're not done." BUA expects that the company will continue innovating with technology, assisted by Sikich. LaFleur comments, "I see BUA continuing to evolve and adopt new technologies that will make it easier and faster for our customers to do business with us and ultimately provide success for everybody."

Based on their experience with Sikich, the BUA stakeholders recommend that other organizations consider working with an expert technology partner to translate technology into practical business value. "I'm of the opinion that if you're not an IT company, but your company relies on IT, you need a company like Sikich," LaFleur says. "The environment is changing rapidly all the time, and trying to keep up with it while still trying to focus on my core business was too much. It was time to find a partner that could handle that responsibility for me, and Sikich has done a great job."

"The quarterly meetings that we have with our vCIO have been very good for us to figure out what our next technology spend should be and how we should be thinking about the evolution of our system, because we're not done."

JACK WRIGHT

President and CEO, Business Underwriters Associates

Sikich practices in an alternative practice structure in accordance with the AICPA Professional Code of Conduct and applicable law, regulations, and professional standards. Sikich CPA LLC is a licensed CPA firm that provides audit and attest services to its clients, and Sikich LLC and its subsidiaries provide tax and business advisory services to its clients. Sikich CPA LLC has a contractual arrangement with Sikich LLC under which Sikich LLC supports Sikich CPA LLC's performance of its professional services. Sikich LLC and its subsidiaries are not licensed CPA firms.

"Sikich" is the brand name under which Sikich CPA LLC and Sikich LLC provide professional services. The entities under the Sikich brand are independently owned and are not liable for the services provided by any other entity providing services under the Sikich brand. The use of the terms "our company", "we" and "us" and other similar terms denote the alternative practice structure of Sikich CPA LLC and Sikich LLC.

Securities offered through Sikich Corporate Finance LLC, member FINRA/SIPC. Investment advisory services offered through Sikich Financial, an SEC Registered Investment Advisor.

