



Bloss & Dillard Inc.

Company snapshot

Bloss & Dillard is an MGA and insurance wholesaler that has provided superior service and a wide range of products to independent agents for over 60 years. Based in Huntington, West Virginia, the firm supports agents and brokers in state and in Ohio, Kentucky, Pennsylvania, North Carolina, Maryland, and Virginia. The company motto is "Service to the local agent, not competition."

"In terms of how important it is to our business, I rate AIM 9 out of 10."

Kathy Kano,

Executive Vice President, Atlas Insurance Agency

Bloss & Dillard Inc.

Vertafore® Solutions:

AIM™

Proven results:

- Trained entire staff in one week
- Improved ability to handle high volume of transactions
- Increased accuracy in all aspects of underwriting process

This MGA uses AIM to provide superior service to agents and brokers.

Since its humble beginnings in a one-room office in 1954, Bloss & Dillard has grown into a thriving MGA that serves independent agents and brokers in West Virginia, Virginia, and surrounding states.

Today Bloss & Dillard operates from a considerably larger main office in Huntington and a satellite office in Richmond, quoting and binding both personal and commercial lines, including high risk and hard-to-place specialty coverages.

Throughout six decades in business, Bloss & Dillard has prospered and grown by focusing on the evolving needs of insurance agents and brokers. The company's experienced underwriters pride themselves on delivering personalized service and expert guidance to a loyal, longstanding customer base.

But in 2009, Bloss & Dillard recognized that its ability to deliver trademark service was being held back by outdated software. Something had to change.

"The way MGAs conduct business is constantly changing... We needed a system that helped us stay competitive and adapt as the industry evolves."

Tate Tooley,
Head of IT, Bloss & Dillard

A superior management solution

Tooley saw how new market forces were disrupting traditional insurance distribution models and how new technologies were increasing customer expectations. Bloss & Dillard decided to update aging software so the company could work more efficiently, provide better service, and increase profitability. A previous management system was aging and no longer met the MGA's needs in this fast-paced era. "It didn't facilitate interaction between and integration with our other software," Tooley remembers.

Bloss & Dillard saw an opportunity to upgrade its capabilities and prepare for the future by adopting a new, comprehensive management system.

That meant finding a scalable management solution that would streamline front-end activities and reduce errors. The firm wanted a widely-used tool that easily worked with carriers that use ACORD-standard forms.

The Vertafore AIM management system, created specifically for MGAs, caught Tooley's eye.

"A large number of MGAs use AIM," he says. "It's an industry-standard tool that syncs with the majority of carriers."

Because of its widespread use, Tooley was easily able to find peers who used AIM so he could learn more about system's benefits. "It was really helpful to talk to fellow professionals to get a feel for how AIM works. It received good marks across the board," Tooley says.

Confident that AIM could help the firm achieve its goals, Bloss & Dillard contacted Vertafore in the spring of 2010.

Implementation and training

Switching to a new management system is a major undertaking for an MGA of any size, but Vertafore helped Bloss & Dillard prepare and plan for implementation.

"Vertafore helped us every step of the way, and created a detailed plan for us to follow," Tooley says. "We had regular conference calls with them to help us stay on track and on schedule. The process was extremely smooth."

In addition to implementation support, Vertafore provided onsite training for the Bloss & Dillard staff. "The training took place over four days," Tooley recalls. "The Vertafore trainers were extremely helpful and did a lot of handholding at first."

The Bloss & Dillard staff quickly picked up on the intuitive AIM workflows, and by the end of the week they were up to speed with minimal disruption.

After just a few months of planning, implementation, and training, Bloss & Dillard made the official switch to AIM—and transformed the way the firm worked.

Managing every aspect of the business

Seven years later, AIM is the management centerpiece of Bloss & Dillard. It's allowed the company to work in a more efficient, streamlined fashion than ever before.

"AIM handles everything in the B&D organization," Tooley says. "100 percent of our accounting and underwriting activities are performed in AIM."

Whether quoting, binding, or invoicing, the smart workflows in AIM help make Bloss & Dillard's underwriting more efficient and error-free. AIM handles all the front-end agency activities like accounting, quoting, binding, policy issuance, policy management, and routine correspondence. Every activity in AIM is tracked and auditable, and everything the staff needs is in one central place.

AIM was designed with the specific needs of MGAs like Bloss & Dillard in mind, with efficient, automated underwriting workflows that ensure completeness. AIM syncs with Vertafore and non-Vertafore software, which saves time and increases accuracy. And because AIM is constantly updated and improved, Bloss & Dillard is confident that the management system will grow along with the MGA.

"In terms of how important it is to our business, I rate AIM 9 out of 10," Tooley says.

A tool for growth

Using AIM to help improve the accuracy of quotes and underwriting makes it possible for Bloss & Dillard to maintain high standards of customer service while also boosting capacity, which means the company can take on new business.

For instance, one carrier decided to outsource the creation and issuance of agent commission checks to Bloss & Dillard. "It was a great business opportunity, but it was also a huge number of transactions every month," Tooley recalls. The sheer volume of work would have been difficult to process with their previous software, but with AIM, Bloss & Dillard was able to take on the new workload.

"It definitely would have been a daunting process in the past, but AIM gave us the ability to smoothly and quickly generate checks for the carrier," Tooley recalls. "We've been doing it for nearly two years now, and we wouldn't have had that new business without AIM."

In addition to increasing capacity and capability, the smooth automated workflows in AIM cut down on duplicate data entry and time-consuming busywork, allowing experienced underwriters to develop new products and cultivate additional business.

A lot has changed at Bloss & Dillard since 1954; it's now a twenty-first century MGA with the tools to adapt and compete in today's volatile insurance market. But one thing has remained constant over the past 60 years—a commitment to personalized customer service and in-depth industry knowledge. With AIM, Bloss & Dillard has a management system that helps the company meet tomorrow's challenges while still delivering old-fashioned service.

Contact Us

or call 800.444.4813



999 18th St | Denver, CO, 80202 | 720.787.3950 | [Vertafore.com](https://www.vertafore.com)

© 2021 Vertafore, Inc. and its subsidiaries. All rights reserved. Trademarks contained herein are owned by Vertafore, Inc. This document is for informational purposes only. Vertafore makes no warranties, express or implied, with respect to the information provided here. Information and views expressed in this document may change without notice. The names of actual companies and products mentioned herein may be the trademarks of their respective owners.