

# CASE STUDY

## GRAHAM COMPANY



## Why Graham Chose Prialto

When Graham Company's President and COO first met with Prialto, Graham was looking for a cost-effective way to provide support while investing for growth at the same time. With their existing and new producers, they found that too much time was being spent on administrative tasks, such as scheduling, prospect research, and CRM updates. Graham also wanted a secure, scalable, and remote service. While they wanted a way to provide producers with sales and admin support, they didn't want or need full time support for each producer, nor did they need to have these support people physically in their offices. They wanted to support their producers spending more time building relationships and developing new business. That's when Prialto was brought in, to provide admin and top-of-funnel sales support.

## About Graham Company

Graham is a top independent insurance brokerage and consulting firm, founded over 60 years ago. Graham is focused on customizing property and casualty, surety, and employee benefits programs for its clients.



The Prialto team streamlined our processes and increased efficiencies allowing us to easily integrate our Prialto assistants into our day to day lives. The data in our CRM is much more up-to-date and accurate which also has improved the efficiency of my team. By offloading our admin tasks, our producers are now able to spend more time in the field with prospects and clients.”

-Carl Bloomfield, Graham Company



# MAKING AN IMPACT

Starting with a pilot of six Prialto assistants, Graham quickly saw the value of the additional support. Prialto assistants began by cleaning up all existing account information in Salesforce, ensuring that the producers had accurate and up-to-date information when reaching out to prospects. Now the Prialto engagement manager works with the producers to create customized processes to maximize their productivity.



## 1. Salesforce Clean Up & Management



## 2. Prospect & Account Research



## 3. Tear Sheets



## 4. Expanding Across the Organization





## SALESFORCE CLEAN UP & MANAGEMENT

Prialto worked with Graham at the start of service to develop Salesforce best practices, so the assistants know what key information to research, including MOD numbers, calculating estimated premiums and ranking the accounts based on specific criteria. Prialto assistants use this knowledge to keep contacts and accounts updated with all critical information. Producers now spend all their time with prospects and clients.



## PROSPECT & ACCOUNT RESEARCH

As Graham expanded into new regions, they found their producers spending too much time with prospect research and not enough time in the market. The PAs took on all aspects of prospect research, including CRM updating and reminders for follow-ups.



## TEAR SHEETS

Researching clients and prospects before meetings was tedious and time consuming for the producers. Together, Prialto and Graham created a tear sheet template that each producer customized to capture the information that matters most to them. Now the assistants provide pre-meeting research on contacts and companies, so the producers go into their meetings with key data points.



## EXPANDING ACROSS THE ORGANIZATION

As Prialto proved successful with the producer teams, the service was tapped to support organizational changes within the Graham Safety Consultant team. The in-house assistant supporting the team was being promoted and Prialto stepped in to help her transition into her new role. After an appropriate training period, Prialto was providing support for the safety consultants working in the field. Most of their tasks and processes include time tracking, expense management, and document formatting. The field consultants experienced a seamless transition.

# KEYS TO SUCCESS

**Graham is succeeding with Prialto because its stakeholders have committed to these best practices:**

- Provide clear guidelines of their processes and expectations to the assistant and the Prialto engagement manager
- Both teams regularly meet to review progress and to continuously optimize service
- Focus on getting the basics dialed in before offloading processes which may require more judgement and nuance from their assistants

## RESULTS

The Graham consultants have experienced a smooth transition from their in-house assistant to their Prialto assistants.

The Prialto assistants continuously find and calculate key insurance numbers, such as the MOD number, estimated premiums, and estimated income, then use this data to rank prospects.

The producers leverage up-to-date Salesforce data to better target prospects and nurture relationships.

All time-consuming processes, like time-tracking and expense reports, are completed accurately and submitted on time so the Graham teams can focus their time and attention on their clients.

In addition to directly supporting Graham's executives, Prialto collaborates internally to identify, document, and share best practices. Valuable processes implemented for one Graham executive can quickly be replicated across the team to ensure consistency and leverage across the organization.





## 13 Executives

Prialto provides support to 13 Graham executives.



## 1,200+ Target Accounts

1,200+ target accounts updated in the first two months.



## 600 Hours Saved

600 hours per month saved on sales and admin tasks.

