



BUILDING A TECHNOLOGY FOUNDATION FOR LONG-TERM BUSINESS SUCCESS

The Client

R. Robertson Insurance Brokers is a full-service insurance brokerage catering to small-to-medium sized businesses and individuals. Dedicated to providing the best coverage at the lowest price, they provide access through a variety of insurance providers to a range of insurance products. These products include property, casualty, home, automotive, and personal and business liability insurance.

The Burning Platform

R. Robertson Insurance Brokers had been experiencing error messages on their computer systems for some time, and its leaders were unsure as to the implications on day-to-day functions. As well, R. Robertson Insurance Brokers wanted to look to the business's potential future technological needs, to see whether those needs could be met by its existing computer systems.

The Business Case

Technology is essential for how R. Robertson Insurance Brokers offers the best combination of coverage, price and service for their clients. Greg Robertson wanted to ensure that his brokerage had the computer systems in place that would help him sustain and grow the business into the future. However, he found that it was difficult to source the kind of support he needed: *"I have a small-to-medium sized brokerage. No company was willing to service us. It's hard to find someone out there to do this kind of work,"* explains Robertson.

Enter Triella

Greg Robertson hired Triella to first assess the impact of the error messages and then provide recommendations based on the brokerage's current IT needs and potential future needs.

Robertson is unequivocal: *"Charles Bennett [Triella's principal] is one of the most thorough, detail-oriented people I've met. He is very competent, knowledgeable, efficient and diligent. He focuses on what's wrong with your systems... and he gets the job done."*

"While Triella can implement most components of the IT fixes that it suggests, it is also just as willing to hand the reins over to internal support or other existing IT support people. This is just one example of how they listen to and support the needs of their clients."

—Greg Robertson,
R. Robertson Insurance Brokers

Exceptional Value

Triella delivered exceptional value through:

- An assessment of existing and future IT needs (everything from servers and software to server configuration and wiring the office).
- The identification and prioritization of problems affecting the performance of the system so that the firm could work on those things that were most important first.
- A clear, concise, and thorough review and a technology roadmap for implementing the recommendations.
- High level troubleshooting around issues that those within the brokerage never thought of, for instance, protecting critical data through a back-up regime based on best practices.
- A price that is very realistic for the amount of time and energy that goes into Triella's work and presentations to leaders.

Exceptional Results

Based on Triella's recommendations, the firm replaced their old server which not only solved the error message, but has resulted in a marked difference in performance. The firm continues to implement the recommendations.

According to Greg Robertson: *"We got everything that we wanted in the review. We gained the confidence that our systems are running adequately, that we're moving in the right direction with our systems, and we achieved this thanks to Triella."*

For more information about R. Robertson Insurance Brokers: www.rrib.com

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Contact Triella at 647.426.1004 or info@triella.com

TRIELLA TECHNOLOGY TRANSFORMATIONS:

We facilitate technology transformations that drive and support business success.
We deliver results through consulting, assessments, services and solutions.

CONSULTING



ASSESSMENTS



SERVICES



SOLUTIONS

