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AGENCY OF THE MONTH

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HARD WORK, DEDICATION, AND HELP FROM FAMILY AND FRIENDS

Agency moves from “doing okay” to “constant improvement”

By Dennis H. Pillsbury

When college roommates Erik J. Loesch and Ryland Hilliard (Hill) Shaw III graduated, they embarked on financial services careers with Prudential. They later decided to leave, and ended up operating their own property/casualty insurance agency. Erik left first and started Atlantic Shield Insurance Group in Mount Pleasant, South Carolina. Hill joined him as a partner in April of 2005.

“We succeeded in spite of ourselves,” Hill recalls, “relying on hard work and dedication. We were obstinate. The word ‘no’ was not part of our vocabulary. And we found that we were a good fit. When we put our minds together, we were unstoppable.”

Even with that, he adds, it still wouldn’t have happened without help from their families. “Erik’s mom, Pam Loesch, was instrumental in helping him get started,” Hill adds, “providing the funds for the fax machine/copier that was almost our whole operation.

And my mom, Trelle Stephens, helped us with moral support and information about how to run a successful agency, something she knew a lot about, since she worked for Jeff Yates at the Independent Insurance Agents and Brokers of America.

“In the beginning,” Hill explains, “we became our own mass marketing team by calling on mortgage bankers, real estate agents and other potential centers of influence, using the Yellow Pages to find them. Our message was simple: ‘We live in the community and

we’re locally owned.’” This effort, along with hard work and their decision not to take any money out of the agency for the first three years in business, proved efficacious.

“We were young and able to work many hours,” he adds. “As we developed relationships with customers, they saw that we were reputable and they started to recommend us to their friends. Our mantra was always to focus on providing the right coverage to our clients.

“While price was important, we recognized that the correct coverage would help us to not only protect our clients, but to protect our reputation as well. We knew that without that, we would quickly fail,” Hill says.

Acquirers show interest

“Thanks to our successful growth, by 2013 we began to attract potential buyers,” Hill remembers. “They came in with a warning that we would eventually plateau and see our value

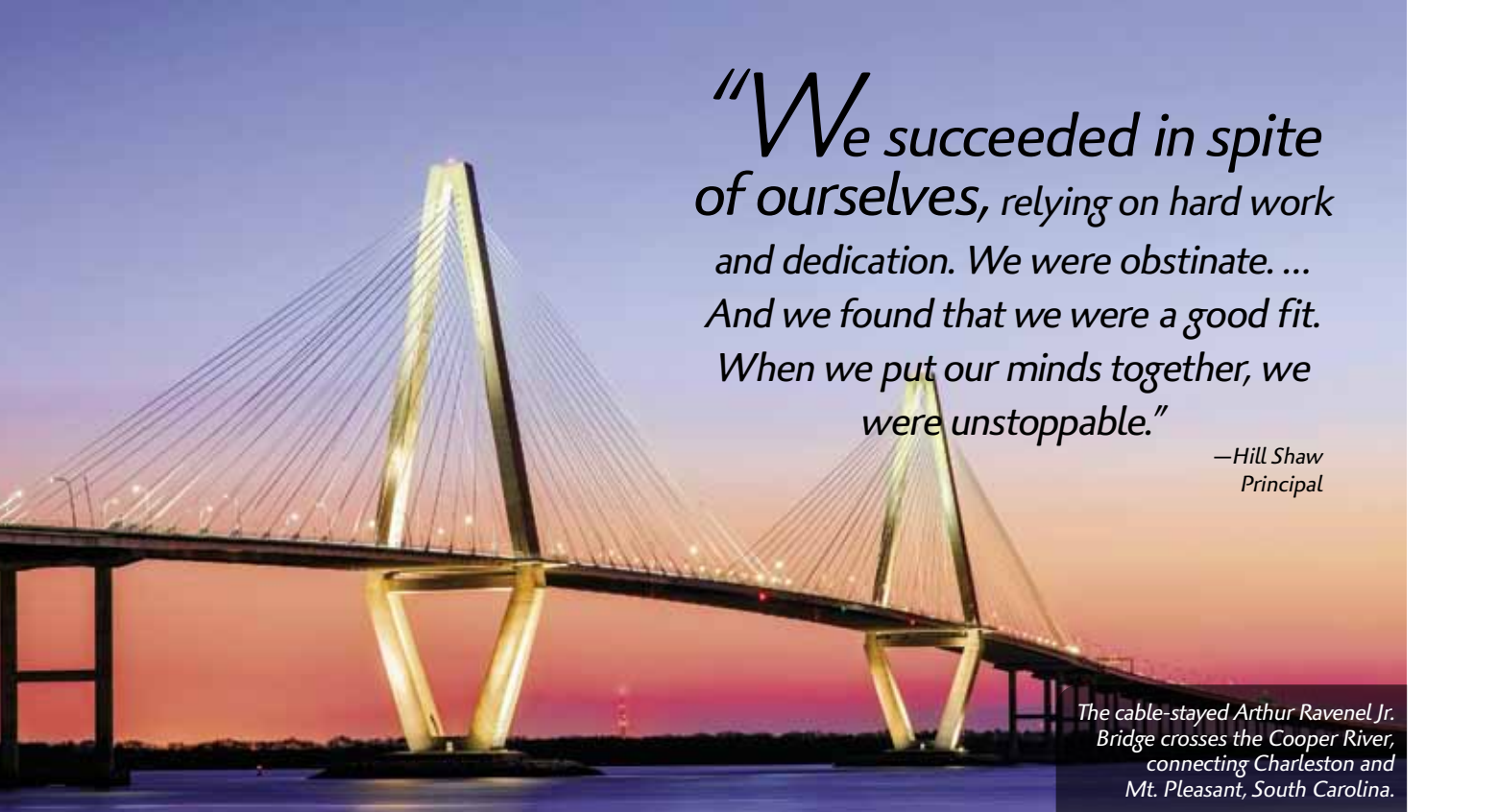


The Atlantic Shield Insurance Group team on the agency's outdoor balcony.

Front row: Ryland Shaw III, Agency Principal; Barbara LaMendola, Director of First Impressions and Administrative Specialist; Kathlene Petteys, Personal Lines Account Manager; Tara Giuliani, Personal Lines/Commercial Lines Department Manager; Erik Loesch, Agency Principal; Jason Stanley, Personal Lines Agent.

Middle row: Susie Schill, Commercial Lines Senior Account Manager; Kelsey Corbett, Commercial Lines Account Manager; Emily Walker, Personal Lines Account Manager; Samantha Hanna, New Business Coordinator; Erica Davis, Operations Manager.

Back row: Andrew Tant, Personal Lines Agent; Keefe Potts, Commercial Lines Agent; Mark Trigonoplos, Commercial Lines Agent; Tim Donahue, Personal Lines Agent; Jay Hunter, Commercial Lines Agent; Peter Vaska, Commercial Lines Agent.



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—Hill Shaw
Principal

The cable-stayed Arthur Ravenel Jr. Bridge crosses the Cooper River, connecting Charleston and Mt. Pleasant, South Carolina.

go down without the backing of a larger organization. Erik and I were convinced that we wouldn't plateau, but we also recognized that we needed to focus on the business.”

He says they could no longer count on their ability to grow simply by working harder. “We needed to work smarter,” he says. “We also realized that we had an obligation to look at the acquisition offers to determine if they would be beneficial not only to us, but to the employees and clients that had helped us build the organization. We asked ourselves: ‘How do we make sure that they come out okay?’”

“I guess you can figure out that we didn't sell by the fact that we're still independent,” Hill adds with a smile. “But we did recognize the need to focus on developing a strategic plan for the agency's future. We needed to establish some type of executive leadership to implement that plan, while passing the production baton to our production and servicing staff.

“Fortunately, we came across The Sitkins Group at the perfect moment, and Roger Sitkins and Brent Kelly became friends and mentors to our agency,” Hill explains. “They pointed out that we were succeeding in spite of our weaknesses, because our strengths were good enough for us to do okay. What we needed to do was create a new environment in the agency where we weren't just scrambling for business, but rather were in an atmosphere where everyone at the agency was looking toward constant improvement.

“Brent explained to us that all agencies are seeking a magic bullet,” Hill recalls, “but added that what we needed was to examine what we're already doing. We all have the answers, he pointed out, adding that it's not what you don't know but what you're doing with what you do know. He helped us focus on the need to develop a strategy around the answers that we already knew.”

Ducks in a row

“In essence,” Hill says, “we took a step back and began a deep exploration of what we were doing and how we could do it better.”

They learned that it was important to slow down to grow—to focus on

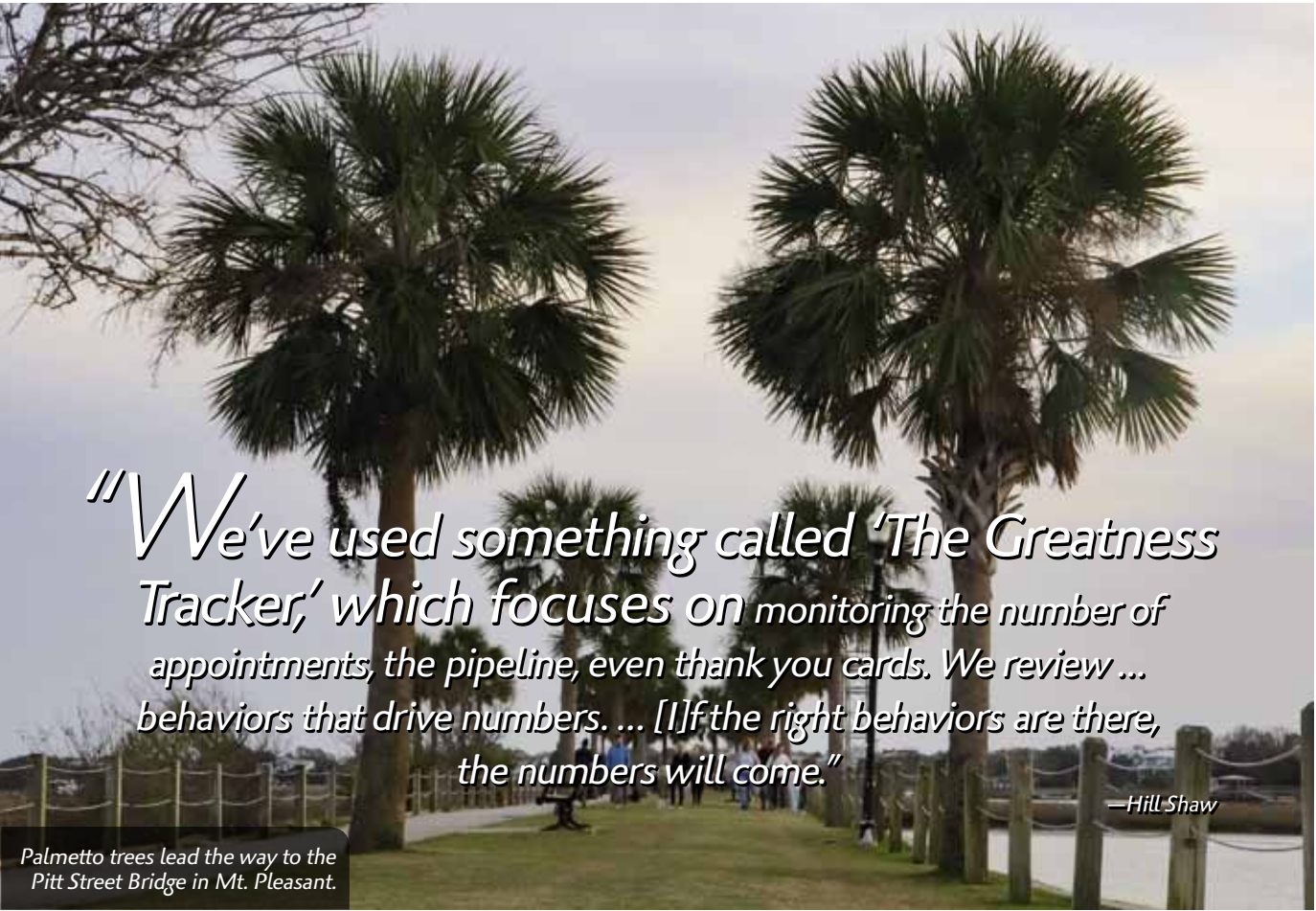
their current client base and see what they were doing well, in addition to identifying areas where they could improve. “In order to convert the agency into one where everyone was accountable, we focused only on current tasks and perfecting them,” he explains. “Only after that was done could we move on to additional tasks, take them one at a time and reach a level of perfection before moving on again.

“This intentionality about improvement can be frustrating,” Hill admits.

The duo found it especially hard to slow down when so much of their early success was the result of charging forward. “Erik and I both felt like fish out of water, sitting through numerous



Erik Loesch, Hill Shaw, Emily Walker and Jay Hunter hold a High Performance Team meeting to review client accounts.



"We've used something called 'The Greatness Tracker,' which focuses on monitoring the number of appointments, the pipeline, even thank you cards. We review ... behaviors that drive numbers. ... [I]f the right behaviors are there, the numbers will come."

—Hill Shaw

Palmetto trees lead the way to the Pitt Street Bridge in Mt. Pleasant.

strategy meetings each day with our executive team," Hill recalls. "We had allowed ourselves to be mired in busy work when what our team members and customers truly needed from us was strategic leadership.

"We had fallen into our own micromanagement trap—one that so many owners find themselves in today," he adds. "But as Roger and Brent showed us, with intentional actions and honest assessments, and by tackling one priority at a time, we could avoid plateaus forever."

At one point, Hill recalls Roger asking him, "What's your business plan?" Hill responded by presenting

him a multi-page document. Roger's next question was, "How many employees know the plan?" Hill didn't offer an answer. "But Roger could tell by the way I looked at him what the answer was," Hill admits.

Roger told Hill to cut the plan down to a single page so every person at the agency could know and understand it. "We were building a foundation for the future by getting everybody on the same page," Hill says.

That was just the start. Other work with Sitkins has helped the agency leadership team move the firm forward as a strong sales organization. "We've used something called 'The Greatness

Tracker,' which focuses on monitoring the number of appointments, the pipeline, even thank you cards," Hill explains.

"We review everyone's 'tracker' each Monday morning with our producers, focusing on behaviors that drive numbers. That's what we manage; if the right behaviors are there, the numbers will come," he says.

The agency also holds meetings every week where account managers and producers collaborate to better serve agency clients. "The meetings review the 'High Performance Team Contract' provided by The Sitkins Network," Hill notes. "It helps us go deeper with our clients and their accounts, to get each team member's perspective on what they see as the hot buttons for a particular client and share this information with the other team members.

"This team approach allows us to really focus on all the needs of a particular client to make certain that everyone is in sync when communicating with the account," he adds.

"Another offering, 'The Producer's Perfect Schedule,' lets us look at the time blocks on each producer's calendar, resulting in strong time management and accountability that leads to future success," Hill says.



While moving toward the future, the agency—like the residents in the area—cherishes South Carolina's past traditions, including its shrimping industry.

Consistency counts

In addition to Erik and Hill, three other leaders have helped shape Atlantic Shield into the successful agency it is today. “Susie Schill, a commercial account executive, is our longest-tenured employee and has been with us since January 2005,” Hill notes. “Erica Davis, our office director, is in charge of human resources and also serves as an executive assistant to Erik and myself. As our chief morale officer, she helps ensure that our office environment is a positive one. Equally important, as our chief accountability coach, she makes certain that we stay on track with implementing our strategy and following through on our goals.”

“Tara Giuliani, our operations manager, oversees operations to make certain that we create a unique customer service experience,” he explains. “Her 15 years of experience allow her to zero in on workflows, not only for efficiency, but to make certain that their impact assures that we maximize every touchpoint that we have with clients. Our frequency and relevance of touch with our clients is a key differentiator for our agency.”

It should be noted that, when this interview occurred, we were all

maintaining social distancing. Despite this restriction, regular meetings with staff continued to happen remotely. “I know it sounds strange, but thank goodness for hurricanes,” Hill says, somewhat ruefully. “Because we are located in an area that can be impacted by hurricanes, we were ready to go into a work-from-home plan without missing a beat.” He does admit that there are different emphases in some of the meetings during the pandemic than following a hurricane.

“These days, we are reminding each of our people of two key words: focus and empathy,” he explains. “We need to be really creative as we deal with clients and listen to what their concerns are. We’ve found that about half the people we talk to just want to talk about anything other than insurance. And we do that. Others are seeing this slowdown in their activity as an opportunity to review coverage and even talk about new risk concerns that we can help them with.”

Clear focus

“As you can tell, our agency has gone 180 degrees, from flying by the seat of our pants to truly having the vision, resources and commitment to execute

on a very high level, thanks in large part to The Sitkins Network,” Hill says.

He adds: “I’d like to finish by saying how blessed we are. In the midst of such a serious crisis, we are able to provide our staff the peace of mind that their jobs remain secure. And communications with our clients have been extremely rewarding for our entire team during these unsettled times.”

“We are honored to be part of an industry that will help our clients and rebuild the economy. While things seem dire, I am convinced that we will come out on the other side of this crisis more appreciative of what we have. The entire world is sharing. Wouldn’t it be great if that continues?” he concludes.

Let’s hope that it does and that by the time this appears in print, we’re starting to see a new beginning.

Rough Notes is proud to recognize Atlantic Shield Insurance Group as our Agency of the Month for staying focused and getting creative for the betterment of their agency and its clients. ■

The author

Dennis Pillsbury is a Virginia-based freelance insurance writer.

Hill Shaw (left) has a Zoom meeting with the agency’s accountability coach, Brent Kelly (right) of The Sitkins Group.



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