

Executive Business Impact & ROI

Everything.Insure Transforms Operations with monday.com

OVERVIEW

In an industry still dominated by spreadsheets, email chains, and manual processes, Everything.Insure set out to build a truly digital insurance brokerage.

While the customer-facing experience was already digital, operational teams were still managing processes across multiple disconnected systems, resulting in fragmented reporting, manual task management, and limited visibility across departments. By implementing monday.com as a central operating platform, Everything.Insure successfully connected sales, client services, claims, and management reporting into a single source of truth.

THE CHALLENGE

According to Tyne van der Merwe, Head of Sales and Data Analytics, one of the biggest challenges was the lack of operational visibility.

"Insurance is a very traditional and old-school business. A lot of traditional brokerages still operate via Excel and pen-and-paper processes. There is very little digital adoption within brokerages."

Despite being a digital-first insurer, internal teams were still dealing with:

- Disconnected reporting across multiple systems
- No centralized task management
- Limited visibility across departments
- Manual follow-up processes
- Difficulty identifying operational bottlenecks

THE SOLUTION

Everything.Insure adopted monday.com as its operational backbone, creating a centralized platform for:

- ✓ Sales management
- ✓ Lead tracking
- ✓ Client servicing
- ✓ Claims management
- ✓ Executive reporting
- ✓ SLA monitoring
- ✓ Cross-department collaboration

Today, every department works from shared boards, dashboards, automations, and integrations.

RESULTS AT A GLANCE

40% Increase In Client Service Efficiency

Client service consultants previously relied on 3-4 different reports to locate information required to assist clients.

Today all relevant information is available in one centralized workspace.

Sales Teams Access Information 92% Faster

Before monday.com:
Average search time: 3 minutes

After monday.com:
Average search time: 15 seconds

60% Increase In Sales

Sales teams now have:

- Complete lead visibility
- Automated follow-up dates
- Automated expiry notifications
- Direct access to client quotations

7-day Reduction In Sales Cycle

With structured lead management and complete pipeline visibility.

6-month Increase In Client Lifetime

Enhanced service delivery and improved process management have contributed to stronger customer relationships.

OPERATIONAL VISIBILITY FOR LEADERSHIP

The leadership team now uses live dashboards and integrations to gain real-time visibility into operational performance across the business.

With over:

85 active dashboards

69,800+ integrations

40 active boards

1.5 million+

events recorded on key operational boards

Management can monitor performance, SLAs, workloads, and operational trends in real time.

"It has given the management team the ability to make instant decisions based on solid data from across the entire business. Change management has become a lot more efficient."

BUILDING ACCOUNTABILITY THROUGH TRANSPARENCY

One of the biggest cultural shifts has been increased accountability.

Automated deadlines and SLA monitoring ensure issues are immediately identified and addressed. Rather than relying on assumptions, management now has access to objective performance data.

"There is now no need to point fingers across departments for tasks that were not done because everything sits in one place."

LOOKING AHEAD

Following the success of the implementation at Everything.Insure, the business plans to roll monday.com out across additional companies within its group.

"We used Everything.Insure as the proof of concept. We can now transfer our learnings very quickly across the other business units."

EXECUTIVE TESTIMONIAL

"monday.com has given us a level of visibility, accountability, and operational control that simply wasn't possible before. Having our teams, processes, and data connected in one place has enabled better decision-making and created efficiencies across the entire business."

Tyne van der Merwe
HEAD OF SALES AND DATA ANALYTICS

Everything.Insure

PARTNER SPOTLIGHT: Why Everything.Insure Chose The CRM Team

Technology alone does not drive transformation. Successful adoption depends on having the right implementation and support partner.

For Everything.Insure, The CRM Team played a key role in ensuring ongoing support and optimization.

"To be honest, if I ever need anything, Jarad is always available. I recently added another group company to their own monday.com instance and it was immediately added to my profile so I could oversee everything. They are quick, efficient, and always willing to help."

Partnership Impact

- ✓ Responsive support
- ✓ Rapid implementation assistance
- ✓ Ongoing optimization guidance
- ✓ Multi-company scalability
- ✓ Trusted strategic partnership