

# The Baldwin Group Journey and Success Story





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The Baldwin Group

# Protecting the Possible

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We've achieved impressive milestones since our firm's founding in 2011, growing our revenue to approximately \$140 million in 2019 – the year of our IPO – to more than \$1.2 billion by the end of 2023. We've evolved from a local business into a national firm, building a collaborative network of colleagues whose diverse insights generate optimal solutions for more than two million clients worldwide. Our nearly **4,000** colleagues consistently deliver for our clients and have continually ranked the firm a "Great Place to Work" by the likes of Fortune and Business Insurance.



## Industry leading organic growth

**19%**<sup>1</sup>

Organic growth

**24%**<sup>2</sup>

Total growth

**>2x**<sup>3</sup>

the growth of our competitors



## Our Operating Groups

We have three high-performing operating groups, providing unique solutions to clients nationwide.



### Insurance Advisory Solutions

- ✓ Retail brokerage
- ✓ Commercial risk management
- ✓ Employee benefits
- ✓ Private risk management



### Mainstreet Insurance Solutions

- ✓ Specialty MGA
- ✓ Reinsurance brokerage
- ✓ Embedded solutions



### Underwriting, Capacity & Technology Solutions

- ✓ Personal lines
- ✓ Medicare offerings



## Notable Accolades



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<sup>1</sup> FY 2023 organic revenue growth for the year ended, 12/31/23.

<sup>2</sup> Calculated as total GAAP revenue for FY 2023 as compared to FY 2022.

<sup>3</sup> Represents BRP Group's organic revenue growth for FY 2023 compared to the average organic revenue growth for the FY 2022.

<sup>4</sup> ICR Strategic Communications & Advisory; Peer Group represents AON, AJG, BRO, WTW, MM for FY 2023.

# Our Culture

As defined by our Azimuth



## Core Values

- Discerning
- Grit
- Genuine
- Engaging
- Purpose
- Dreaming



## Our Purpose

Deliver indispensable, tailored insurance and risk management insights and solutions to ensure our clients have the peace of mind to pursue their dreams, purpose and passions.



## Our Promises

- Client First
- Comprehensive Protection
- Peace of Mind



## Our Vision

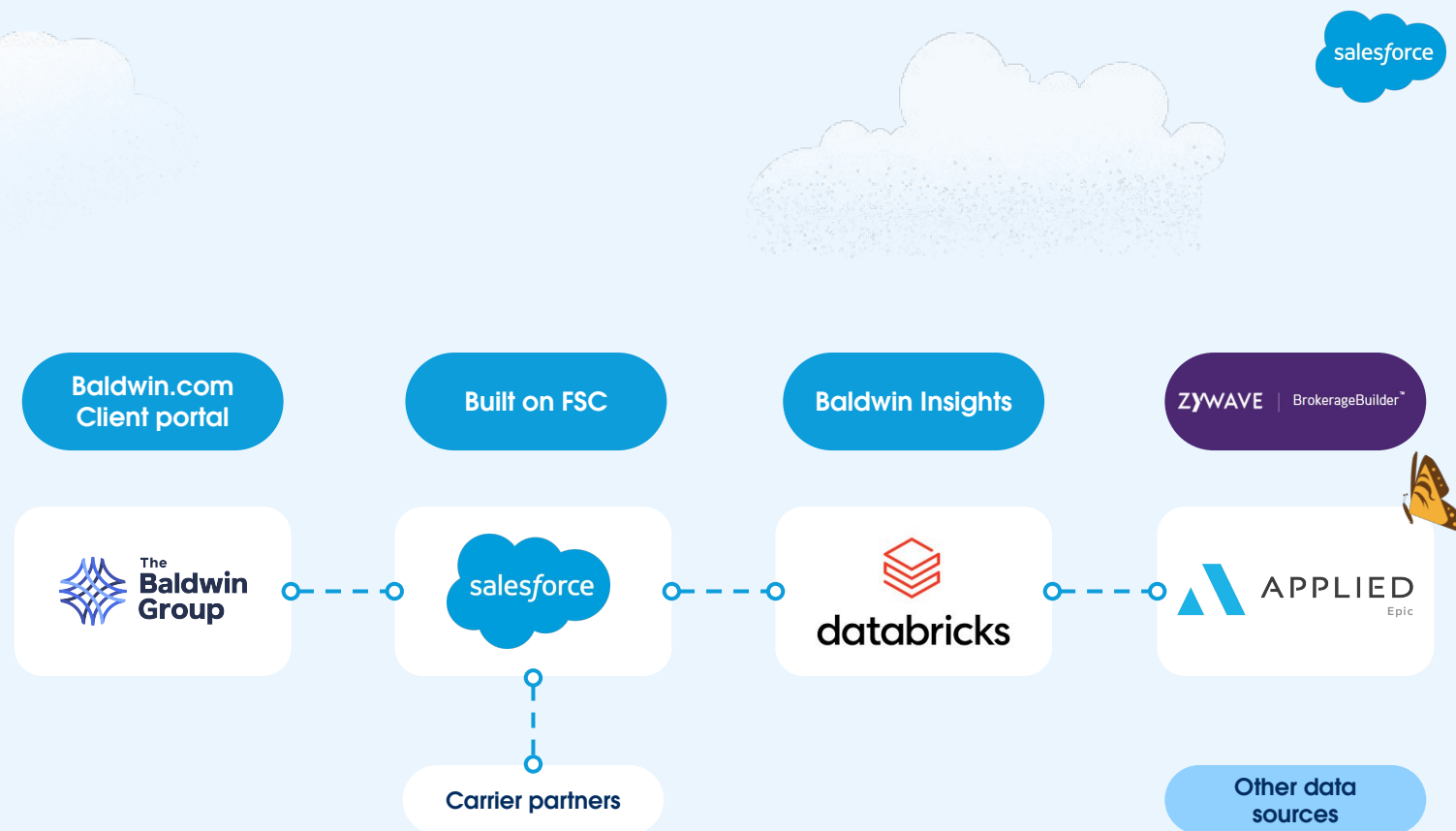
To be regarded as the preeminent insurance advisory firm fueled by relationships, powered by people and exemplified by client adoption and loyalty, colleague development and engagement and operational acumen and evolution.



**Azimuth**  
Finding our true north

# Unified experience

To enable a diverse, entrepreneurial community of colleagues, clients, and partners to create vanguard solutions and experiences with a technical superhub built on the dream of collaboration.



# Elevating experience

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IAS



## Commercial

- All partners are live on enterprise SFDC org, integrated solution with AMS. Mobile enabled
- Client facing portal for document collection
- Holistic selling opportunities for advisors
- Financial services partners have AMS features in SFDC

MIS



## Consumer

- 100% of our call center advisor sales are driven through SFDC
- Telephony integration with CxOne enabled 100% visibility on lead queues and boosted advisor productivity
- Building integrated experience for our Mainstreet advisors

Small Business



## Small Business

- Client portal is tightly integrated with SFDC enabling document collection and seamless interaction
- APEX + SFDC serve the end-to-end client journey
- All AMS capabilities are in SFDC, custom built

# Product approach

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## 1. Designing

Design and build intuitive user experience in Stratus



## 2. Measuring

Measuring success with adoption and performance (Marketing/Sales/Service)



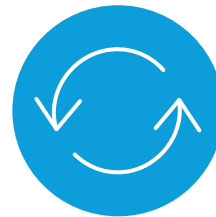
## 3. Listening

Continuous listening to our user's experience



## 4. Maturing

Enhancing our colleague's fluency with business process and technology



# STRATUS

# Client journey

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**Overview** - A brief description of what is captured in the journey map.



**Doing** - An in-depth examination of Client/Colleague interactions during each journey stage.



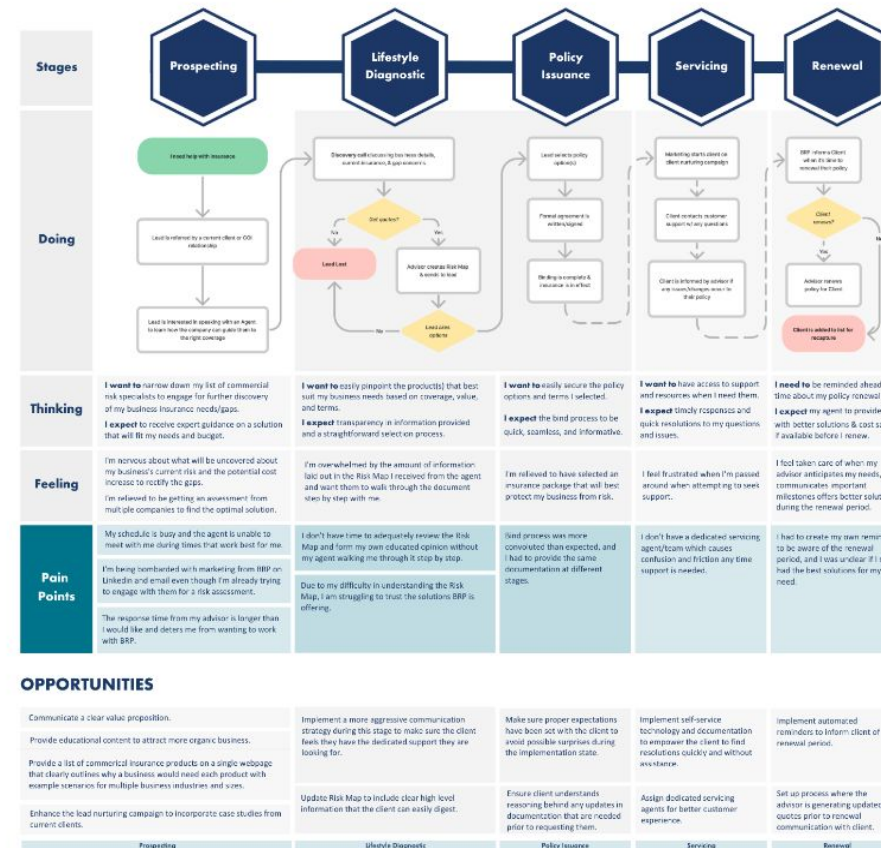
Client/Colleague **thought process** and **emotions** as they progress through each stage.



**Opportunities** to improve the overall experience for Clients/Colleague

## Experience Map - PRM Client & Colleague

**Overview:** Key client activities and colleague touch-points across the end to end lifecycle from pre-acquisition, acquisition and post-acquisition phases.



Process Flow

Qualitative Insights

Takeaways



**Stages** in the Client & Colleague journey



**Pain Points** - Specific problems that the client/Colleague is experiencing.

# Capability hive



## 1. Designing

Design and build intuitive user experience in Stratus



# Listening

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## 2. Listening

Continuous listening to enhance our user's experience

### Repeating themes:



Simplify/reduce the data being requested at various stages, make it super simple to enter and convert leads and opportunities and convert/close



Inconsistency in using Accounts (meant for clients) and Opportunities (Deals)



Give me the most important reports on my home page

- My active pipeline, My prospects, My activities, My leads, Predictions, Scores
- Visibility to my sales against goals



Colleagues are unaware of various features that help them



Leads vs Prospects, when to use what, struggles with basic Salesforce acumen



Tenured advisors prefer to use their whiteboards and own lists to track

Give me a keyboardless experience

# Measuring

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## 3. Measuring

Measuring success with adoption and performance

Our adoption is ~65%



### What we measure today

- 1 Login percentages
- 2 Opportunities created, closed and past due
- 3 Activities created, closed and past due
- 4 Leads created, converted
- 5 Prospects with meetings, opportunity plans



### Adoption vision/Lessons learned

#### Creating the 'PULL' factor

- Reducing Advisor keystrokes
- Unlock AI, reduce Advisor clicks
- Deliver predictive intelligence
- Deliver potential opportunities on home page
- Catering to niche areas' business process
- Gamify, incentives through leaderboards



# Maturing



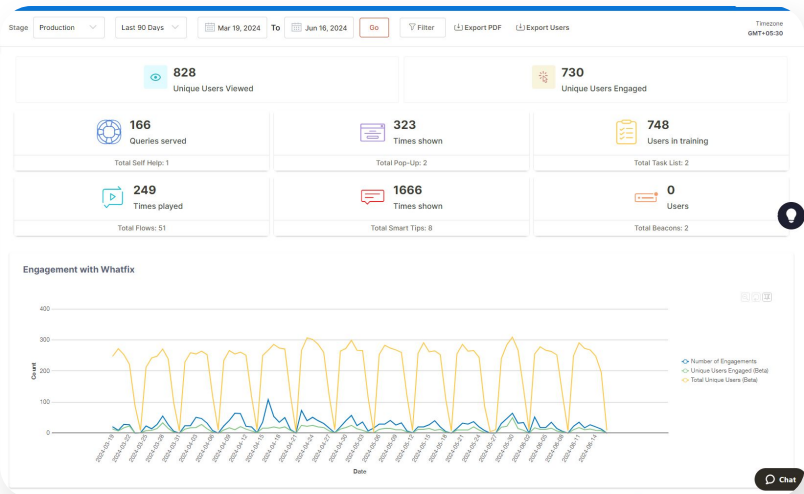
## 4. Maturing

Enhancing our colleague's fluency with business process and technology



### Training & Change management

- Content creation and organizing (E-Learnings, In-app guidance powered by WhatFix Modules)
- Recruit Sales leaders
- Training environment, tracking progress on learning



### How Do I?

Your Status Profile

Leads and Referrals

Your Prospects and Clients (Accounts)

Contacts

Sales Opportunities

Chatter

Quick Reference Guides

Need Technical Help? Open a ticket here!

Powered by



# Thank You

