

Client Profile:

Brown & Brown Insurance



COMPANY



FOUNDED

1939

EMPLOYEES

15,000+

LOCATIONS

500

FOOTPRINT

50

CHALLENGE

Track & renew 21,000+ licenses for 800+ individuals and 140+ entities

SOLUTION

Migrate to Creative Compliance Hub

Tammy Miller, Corporate Licensing Director, oversees license compliance for the retail side of Brown & Brown Insurance, the 5th largest brokerage in the nation. After 10+ years at Brown & Brown, her role is mostly strategic, focusing on improving procedures, processes, and communications. Her team of three license administrators tackles the daily tasks related to renewals, new hires, changes of officers, address changes, DRPs, and more. Elsewhere, other teams within other Brown & Brown entities manage those same business-specific activities in addition to tracking CE, new appointments, and scheduling exams.

For the past eight years, Tammy and her team used a product from a major provider as their license management platform. "I had no problem with them," says Tammy, "They were very nice people." But things changed after a period of rapid growth and diversification at Brown & Brown. "We were making the system work for us," recalls Tammy, "but it wasn't ideal."

Always Take the Demo

In the same way that the worst time to buy an air conditioner is mid-summer, the best time to shop for a licensing management platform is when you don't need one. "I was not actively looking for somewhere to move," recalls Tammy, "I get emails from everybody all the time. Most of the time, I just ignore them because I've seen a lot of the systems out there, and they're great, but they're ridiculously expensive and so decided I'd rather stay with what I have."

Then, Tammy was contacted by Creative Compliance Software. "I had not seen Creative Compliance Hub, so I decided I should take a look and see what you have to offer. As we walked through the demo, I really liked what I saw and I thought, 'this might really work for what we need to do.'"



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— TAMMY MILLER, CORPORATE LICENSING DIRECTOR

Tammy still wasn't sold on switching platforms. But she liked what she saw enough to set up demos for her team and the teams that manage licenses in other locations/entities. "Some of the other teams track things like CE, appointments, and exams. Those are things my team doesn't do so they weren't areas I was looking at. I wanted input from the other teams to make sure Creative Compliance Hub would work for everyone."

Contact us at info@3hcs.com or 518-583-0639

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CORPORATE LICENSING
DIRECTOR

It took some time to schedule but once everyone had seen a demo, the teams talked through the plusses and minuses of both systems. Tammy and the rest of the license management team were sold on Creative Compliance Hub. “I ran it by my leader, and he said the price looks good and as long as you’re happy, I’m happy,” Tammy says with a smile. She’s happy.

What’s Working for the Licensing Team?

Switching to a new system takes some getting used to. As Tammy points out, “The information is all there, but it’s in a different place. And it can be hard for people who are used to doing things in a certain way to adjust to a new system.” But soon enough, people embraced the new interfaces that improved workflows and saved time.

“I really love the Creative Compliance Hub dashboard,” says Tammy. “Having all those color-coded graphs and maps makes it easy for me when I log in first thing in the morning. Right away, I can see what’s a priority. And with just a click, I can see if it’s something we need to act on or if it’s something we’re already on top of. That’s a big time saver for me.

“Nightly PDB updates are another time saver. In the past, one of my colleagues at another location was paying for PDB updates. But she said it wasn’t timely, it wasn’t nightly. Now, with Creative Compliance Hub, we’re getting PDB updates nightly. And that saves us a lot of time by not having to manually update dates anymore.

“And we really like that we can keep track of all the various states’ background questions. All the information for each producer is in one easily accessible place. When we’re renewing a license, we have all the documentation we need right at our fingertips.

And Tammy concludes, “I really like the cybersecurity module. And even though we’re not using them yet, I really liked that there was a TPA and RPG module. We’ll begin using them in due course.”

Conclusion: Take a Demo of Creative Compliance Hub!

When you’re the 5th largest brokerage in the US, switching license management platforms is a big decision. By migrating to Creative Compliance Hub, Brown & Brown Insurance implemented a platform that works better for their needs and helps them maintain compliance while operating more efficiently. “Now” is always the right time to make improvements. For Tammy Miller, Corporate Licensing Director, improvement began the moment she chose to take a demo of Creative Compliance Hub.

**We invite you to take
a demo, too.**

SCHEDULE A DEMO



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