

Simple. Safe. Secure. ISG opens new doors during lockdown

ShareFile enables long-term working model for US insurance specialist

A foundation of integrity and transparency

Insurance involves a combination of critical business attributes. Trust, security and reliability are the industry's foundation, and falling short on even just one of these puts an operator in severe jeopardy.

Based in St. Petersburg, Florida, but with operations throughout the United States, Insurance Services Group of the Southeast (ISG) specializes in insurance premium audit. ISG works with insurance carriers and managing agencies to compare business clients' insurance coverage with their actual exposure and adjust premiums and policies accordingly.

Whether it's a one-person carpentry business, or a Fortune 100 giant, ISG's clients expect certain standards of integrity and transparency from their insurers – and from ISG.

Evolving operations, improving strategies

COVID-19 meant ISG had to change its means of operation almost overnight. Prior to March 2020, ISG was very much an in-person operation. Staff and agents would visit clients on site; most of the company's business was carried out on a face-to-face basis. Lockdown ended that. The client visits stopped; ISG had to pivot immediately to remote operations.

"When the pandemic hit, we all had to be incredibly nimble with things," recalls ISG Founder and CEO, Brian Thornton. "Around 95% of our revenue prior to COVID was derived from in-person physical visits. As you can imagine, it was a very unsettling situation to be in."

ISG needed a way to transfer vast volumes of highly sensitive and confidential files both internally and externally between itself and its clients. Many of ISG's competitors simply used email, but Thornton realized that this could be problematic. "It's about integrity. If I'm the subject of one of our audits, do I want to be emailing my information to someone I don't know or have never met? No, clearly I don't."

Fortunately, ISG had recently started to use [Citrix ShareFile](#) for its larger clients. It was time to expand the use case.



Industry
Insurance

Location
Florida, USA

Citrix Products
• [Citrix ShareFile](#)

Easy implementation

Bil Danielson, Executive Auditor at ISG, discovered ShareFile when looking for a secure file-transfer tool for his portfolio of Fortune 100 businesses. “We are at the forefront of our industry, and some of the things we do technologically really play into the needs, wants and desires of the policyholders we audit,” he explains. “ShareFile meant we could offer a seamless and encrypted file-transfer protocol. It’s safe, simple and secure.”

Implementation was pretty much out of the box, with some initial tutelage from a Citrix trainer to get ISG up to speed. ISG utilizes ShareFile’s premium solution for collaboration with their Fortune 500 clients, and then added a basic tier for lower-volume day-to-day audit work. “Citrix made it easy,” adds Thornton. “We could get the whole solution spun up almost entirely in-house.”

“The initial training was a very valuable resource and got us up the curve much quicker,” adds Danielson. “But once we were rolling, we managed everything ourselves. All we needed to do was add our logo and make some other personalized adjustments.”

A beautiful solution

Insurance is regulated at state level in the US, which means in many ways it’s effectively a collection of 50 mid-sized industries rather than one giant one.

“As an audit firm, we have to be ambidextrous across 50 states,” notes Danielson. But this is one area where he believes ShareFile gives ISG a major advantage.

Danielson continues: “We set up a specific protocol on ShareFile with a major national client so they can upload a super-master file and pass it on to me securely and easily.” He then uses that file to build multiple audits from a single source, and then to enable a much simpler process for future audits. “It’s a beautiful solution that works seamlessly and highly effectively for a huge client corporation,” Danielson adds. “It would be an absolute nightmare to handle it in any other way.”

ShareFile also has delivered in areas that Thornton hadn’t previously anticipated. He explains that ISG is now able to recruit from a much wider pool of talent than before, supporting the business in impressive 20% annual growth rates during a period that for many was terminal. “If you can audit to our standards, it doesn’t matter now whether you’re in Washington State or Germany. We have a very easy, seamless way to get work to you and back from you.”

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Bil Danielson
Executive Auditor
ISG

Enabling a new long-term model

With COVID hopefully abating, there has been some transition back to in-person working, but the majority of ISG's business now takes place remotely, and Thornton expects that to be a long-term working model. "Around one-third of our operation is back to that physical model, and that seems to be where it's leveling out," he adds. "That's really a testament to the ShareFile technology that people have the ability to do this."

Thornton is now looking to combine ShareFile with Visual Audit software to add further value to the audit process, using the Citrix open API to use the platform more broadly, while Danielson plans to make further use of the additional folder features to increase ease of accountability. "We now prospect very differently, and we market very differently," concludes Thornton. "ShareFile has been a game changer for us, for sure."

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**Brian Thornto
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