

## A Practical Approach to Technology



WaFD Insurance Group is a WaFD Bank company with offices in Washington, Oregon, Idaho, Nevada, Utah, Arizona, New Mexico, Texas, and California. As a group of independent insurance agencies, WaFD offers choices because it represents a number of different insurance companies. So, it compares coverages and prices to find the best possible value for its customers. WaFD independent agents are members of their communities, committed to doing business face-to-face and being their customers' advocates in times of need.

Duane Henson is the president of WaFD Insurance Group. As a guy who says of technology, "When it works, great. I don't try to understand it. I just want to get it to work," Duane reached out to us to move the email server he'd been using over to Microsoft Office 365. We asked O'Brien Communications Group (OCG) to talk with Duane to get his thoughts on working with us and what he might see coming next:

**OCG:** Thank you for making time for us today. We know you've worked with Rhodian Group to migrate from one email exchange to Microsoft Office. Would you like to comment on that project?

**Duane:** Ninety-eight percent went smoothly. Two percent did not. But that had nothing to do with Rhodian Group. It had to do with our computers. You can set up a network perfectly. But there's always going to be one or two or five computers that just don't work. So, we did have to spend time trying to fix people's computers to be able to send and receive emails. It was just some weird stuff that always happens with technology.

**OCG:** How did you find Rhodian Group and why did you decide to go with them?

**Duane:** I got a couple of referrals. The first company I talked to said he'd move 135 email boxes for \$60,000. I said,

"That's ridiculous. It's not that much work." My next call was to Rhodian Group. The price was what I thought was reasonable for the job. We had a few hiccups along the way. But that's the nature of technology conversions. If anybody were to ask me about that process, I'd say we were treated fairly, respectfully. One of the Rhodian guys called me one night at eight o'clock to make sure that we had a specific problem fixed. I said, "Why are you calling me so late at night?" And he said, "Why are you answering your phone?" It's all about professionalism and paying attention to the details. Another once asked me if I'm an IT guy. It was pretty funny because as we're on the phone the next day trying to fix things, I'm walking him through how to do it and he is just listening and goes, "Are you an IT guy?" And I said, "No, I'm not. I just know enough to fix problems." [laughs] Again, it was a referral, and it was a good referral.

**OCG:** Is the job of moving the email addresses to Microsoft Office 365 complete?

**Duane:** Well, we've acquired about 18 agencies, all with different email systems and conventions. We want to get all those emails under the same system, so we don't have some with Yahoo, some with Google, some with their ISPs. We're knocking them off one at a time. I haven't talked to Rhodian about moving those over yet.

**OCG:** Will you look at cybersecurity at some point?

**Duane:** Yes, for the virtual desktops when we get there.

**OCG:** Do you have other plans to deepen your relationship with Rhodian Group as you work with the bank to get more involved through them with your insurance sales?

**Duane:** Right now, 75 percent of us are on the bank's platform for our computers. And we have some producers and support people who aren't bank employees. We have our own computers set up for them. But they were on their own servers. We could log into their server, but then they



moved to the cloud. When they do updates, we can't get into certain files anymore. It slows down our whole process. That left us with two choices: Either we do it on our network with our computers, or we do it on the bank's network. We gave the bank full access to our network. But we have issues with not being able to do everything we need to do in a timely fashion. It's tough.

**OCC:** We know you're considering some of Rhodian Group's virtual desktops. When it comes to something like cyber security, how would that work? You'd want to keep your network separate, wouldn't you?

**DUANE:** Yes.

**OCC:** If the bank got hacked, what would happen to that interoperability?

**DUANE:** If we weren't on the bank's network, we wouldn't get locked down.

**OCC:** We have insurance backgrounds. But it sounds like your business model and your circumstances have more business processes than a typical insurance agency. Has working with Rhodian made your processes any easier?

**DUANE:** The choices were to do it myself and patchwork it — or to find someone who works well with me and can do the things I want done cleanly. That's where Rhodian stepped in. Some of the conversions are still a challenge. The data can go into a dummy database and be flowed in. Or it can be downloaded into Excel and uploaded. But if the data isn't 100 percent correct, you've got issues. But we're working with Rhodian to determine the best way to go about it.

**OCC:** This may sound like fishing, but do you consider Rhodian Group a partner?

**DUANE:** As of right now, yes. I told them we're part of The Association of Risk Managers Northwest (ARM Northwest), a small group of agents. We get together three times a year, talk about our woes, our flows, and what we've done. If somebody has an issue, we tell them, "You should try these

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guys to help you." Had I known about Rhodian earlier, I'd have already talked you up. We're part of MarshBerry, too, as well as a member of a group of 12 other bank-owned insurance agencies. So, I'll bring up Rhodian with all of them. I don't know what else Rhodian offers. But if there is technology they need help with, I'll refer them to Rhodian. When I have success in this business, I like to talk about it because I want my peers and my partners to be successful, too. I tell my clients the same thing: "If you don't have all your insurance with me and I'm not successful, I can't be around here to be your agent."

**OCC:** Thank you, Duane. We're grateful for all you've shared with us.

### About Rhodian Group

We combine the capabilities of an MSP with cybersecurity and compliance services, providing accessible, reliable, and secure work environments so you can grow your business.