



Shepherd  
INSURANCE

## Customer Story

# Shepherd Insurance: Better Strategic Planning Through Reporting with Informer

### Pain points

- Reports scattered across systems with no single source of truth
- Leadership received outdated numbers by the time reports were delivered
- Limited flexibility to customize or update reports in real time
- Manual report creation and distribution consumed valuable analyst time

### Results

- Real-time, on-demand reporting with instant updates
- Automated report delivery replaced manual distribution
- Faster access to insights improved decision speed and confidence
- Interactive views enabled instant analysis by carrier, office, and client



## Overview

Shepherd Insurance has delivered tailored risk management solutions for over 45 years. As one of the largest independent insurance agencies in the United States, Shepherd offers access to more than 200 insurance carriers, enabling the creation of customized coverage for both personal and commercial needs. The agency provides a wide range of insurance products and services designed to support its clients' goals.

## Challenge: Reporting Barriers that Affect Clarity

At Shepherd Insurance, data was never the problem; accessing and understanding it was. Reports were scattered, updates were slow, and by the time numbers reached decision-makers, they were already outdated. The team needed a solution that could turn their data from a burden into a strength.

That's when Shepherd Insurance discovered Informer.



*We were looking for a solution that didn't just report data but helped us understand it. Informer gave us that clarity, it allows us to build exactly what we need, when we need it.*

**Alysa Gay, Data Analyst, Shepherd Insurance**



What started as a search for a better reporting tool quickly evolved into a transformation of how the entire agency planned, analyzed, and made decisions.

### A Lack Flexibility and Real Time Access to Reports

Before adopting Informer, Shepherd Insurance used Helix for their reporting needs. While Helix met basic requirements, it didn't offer the flexibility or real-time access the team needed.

*"Helix served a purpose, but we needed more agility," Gay explained. "Informer provided incredible value for money, on-demand reporting, flexible data distribution, and customization options that made sense for us. We're actually spending less on Informer than we did on Helix."*

— **Alysa Gay, Data Analyst, Shepherd Insurance**

The ability to automate report distribution via email became an immediate win. Instead of pulling data manually, team members received what they needed directly in their inboxes, saving valuable time and keeping everyone aligned.

### Solution: Freedom to Customize, Without the Complexity

From the start, what stood out most to Gay and her team was Informer's adaptability. This flexibility means every department gets dashboards tailored to their needs, from producers tracking performance to executives monitoring growth.

Security, too, was non-negotiable. Informer's row-level security ensures that employees see only the data relevant to their role, maintaining privacy while keeping critical insights accessible.

Add to that, the dual benefit of automated email delivery with the option to log in for deeper analysis, and Informer became a tool everyone could use comfortably, regardless of technical ability.

### Encouraging Adoption Across the Agency

Informer's flexibility has empowered Shepherd Insurance to boost user adoption in a way that feels natural and engaging. Some team members love the convenience of reports delivered straight to their inbox, while others enjoy diving into the data themselves to uncover insights.



*Informer provided incredible value for money, on-demand reporting, flexible data distribution, and customization options that made sense for us.*

**Alysa Gay, Data Analyst, Shepherd Insurance**



Commission reports have become the go-to favorite and are the main reason producers log into Informer. With this insight, Shepherd has begun to consider working with the Informer team to build even more around that data.

By giving employees the freedom to interact with reporting data however they prefer, whether it's through automated emails or interactive dashboards, Shepherd is turning data access into an effortless, motivating part of everyday work.

### Results: A New Level of Productivity and Insight

Since implementing Informer, productivity across the agency has surged. The ability to make quick changes, add new data sources, and adjust reports in real time has become second nature.

*"We've gotten really good at tweaking and adding reporting data as needed. It's been a massive change from our Helix experience. Informer gives us the right reports that provide the answers we need, when we need them."*

**- Alysa Gay, Data Analyst, Shepherd Insurance**

This shift to on-demand, data-driven intelligence has improved not only speed but also confidence in decision-making. Teams now operate with clarity, not guesswork.

### Exceeded Expectations with Informer

One of Gay's favorite success stories highlights just how much Informer has changed the way Shepherd operates.

*"We can now instantly see a client's book by carrier, location, top client, department, or office. That level of visibility used to take hours, now it's just a few clicks."*

**- Alysa Gay, Data Analyst, Shepherd Insurance**

The ability to instantly explore and filter information has made it easier to identify opportunities, address risks, and plan proactively, something that was nearly impossible before Informer.



*We can now instantly see a client's book by carrier, location, top client, department, or office. That level of visibility used to take hours, now it's just a few clicks.*

**Alysa Gay, Data Analyst, Shepherd Insurance**





### Building a Smarter Future

For Shepherd Insurance, Informer has become more than a reporting tool, it's a strategic partner. The platform's flexibility, automation, and usability have reshaped how the agency makes decisions, plans growth, and collaborates across teams.

Ready to move faster, see further, and work smarter like Shepherd Insurance?

Let's Talk



*Informer is not just a reporting tool, it's the foundation for better strategic planning.*

**Alysa Gay, Data Analyst, Shepherd Insurance**

