

Creating a Powerful Culture: Shaping a Family-Owned Insurance Agency for Future Success

Case Study:
**Collaboration's Engagement
with Morris & Garritano**



Collaboration
business consulting

www.Collaboration-llc.com

ABOUT MORRIS & GARRITANO

Morris and Garritano is an independently owned insurance agency headquartered in San Luis Obispo, CA with an additional office in Santa Maria, CA. They provide a full range of brokerage services including employee benefits, property and casualty, personal insurance, as well as financial and retirement planning. As one of the largest independent insurance agencies in California with over 120 employees, their clients range from corporations stretched over multiple states to small businesses with complex exposures. They act locally but think globally, with personal service designed specifically for each individual client.

THE CHALLENGE

Morris & Garritano is a true family-owned business success story. Brendan Morris, CEO, and Kerry Morris, COO, recognized the company needed to undergo some changes to continue to grow and remain an independently owned insurance agency.

The agency experienced a common problem: they underwent a tremendous amount of organic growth which resulted in growing pains as the company sought to keep up with the demand. Morris & Garritano contacted Collaboration Business Consulting in 2016 to define a strategic plan in addition to properly defining the roles of the executive and management teams.

“We looked at the growth that we had been able to drive forward and understood that we needed to continue driving that growth. But, we also recognized that Brendan and I, as well as others on the executive team, would need to take on different roles to run the company in the future.”



Kerry Morris
COO of Morris & Garritano



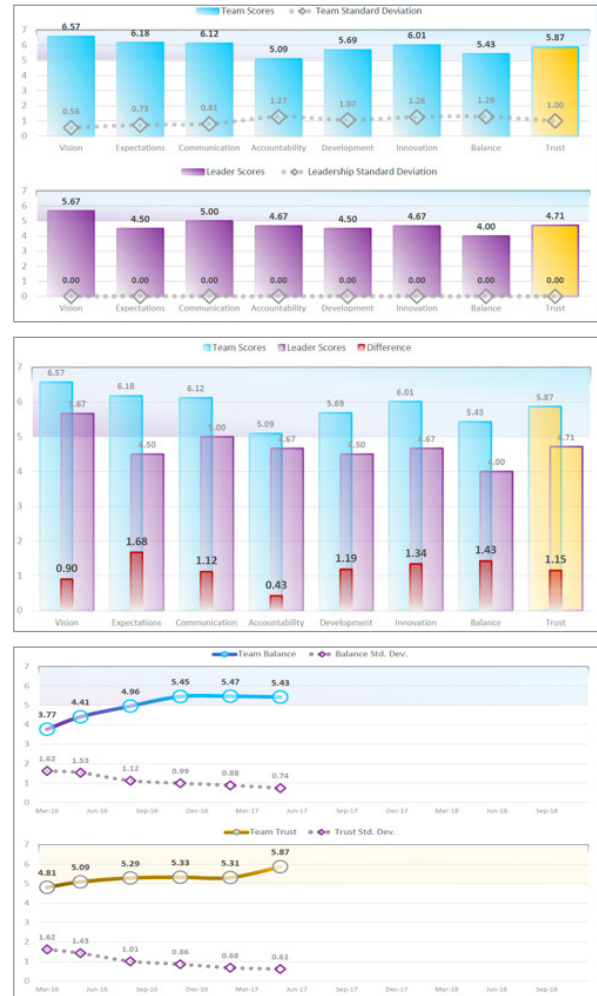
THE COLLABORATION SOLUTION

Collaboration worked with Brendan and Kerry to refresh the 133-year-old company to ensure its longevity in the future. Before any strategic plan could be put into place, Collaboration took a “back to basics” approach to build a solid foundation for the business moving forward. This included redefining the company’s mission, five-year vision and core values to better align with the projected big picture growth. Collaboration reinforced the notion that in order to achieve big things, the company needed to have a strong mission and core values to support that effort.

Supporting growth means that the team must also learn new skills and, in the case of Morris & Garritano, expansion was necessary. The executive team was wearing too many hats and Collaboration suggested hiring additional staff to share the workload. This would allow Brendan and Kerry to focus more on strategy rather than the day-to-day operations.

Collaboration helped the company form an effective executive team and transformed how the company operated as a team. A complete reorganization of the executive and management teams was enacted, and management routines and structures were put into place that solidified Morris & Garritano’s place as a sustainably growing company. Most employees underwent Collaboration’s Collaborative Leadership Program, which takes leaders on a journey of evolution to discover their strengths and areas of improvement while giving them the tools they need to bolster their skill sets. Morris & Garritano’s employees developed the necessary skills to grow right along with the company’s bottom line. Brendan and Kerry credit Collaboration with teaching them leadership skills to become the most effective leaders they can be.

Collaboration instituted a company-wide WorkTraits assessment so each employee could better understand their personality type and how it fit into their role, their department, and the overall company culture. WorkTraits identifies an individual’s behavioral and communication styles, while also assessing motivations. Employees are left with actionable feedback to help them understand how to work best with their teams and managers.



Example of the Collaborative Leader™ Assessment, key tool used in leadership development.



Family-owned businesses are the backbone of our communities. Morris & Garritano has been in business for over 100 years. To keep that momentum going, things had to change at a fundamental level. We helped the leadership develop the company into a thriving business that has the ability to change with the times.”



Michael Gunther
Collaboration Business Consulting Founder

Collaboration gave us the instruction and foundation to propel us into the future.”



Brendan Morris
CEO of Morris & Garritano

I know that we would not be where we are today without Collaboration Business Consulting. Our management team wasn’t going to grow into the leaders we needed without the leadership they received from Collaboration. WorkTraits gave our team the various communication tools they needed to work effectively together.”



Kerry Morris
COO of Morris & Garritano

RESULTS

The successful engagement between Morris & Garritano and Collaboration is measured by the company's incredible revenue growth: The company grew from a \$9.5M company to a \$19M company. Brendan credits the strategic and implementation plans developed with Collaboration as the differentiator in allowing the company to sustain and scale its growth.

A major revelation for any company is understanding the "Why". Once Brendan and Kerry developed their "Why" for the company, they had a roadmap to get the rest of the team on board. Morris & Garritano prides itself on being a transparent company, and they were able to become even more transparent after communicating their "Why" to the rest of the team.

The processes put into place during the engagement with Collaboration are still used daily within the company. All leaders and employees understand their accountability to one another and to the company's five-year vision. Kerry explains that the company did veer from the plan slightly, but quickly course-corrected and made some hard decisions to keep the five-year vision on track and to ensure Morris & Garritano continues to be the company they wanted to be.

Thanks to the collaborative culture developed at Morris & Garritano, they are consistently listed on numerous 'Best of' lists, including but not limited to:

- ✓ Awarded 'Best Practices' status from the Independent Insurance Agents & Brokers of America, three years in a row
- ✓ Insurance Journal's 'America's Overall Best Agency to Work For'
- ✓ #1 on The Pacific Coast Business Times' 'Best Places to Work' list in 2018
- ✓ National Underwriter's 'Agency of the Year'
- ✓ Inc. 5000's Fastest Growing Companies

The leadership at Morris & Garritano believes that the help from Collaboration to build a solid foundation for success allowed them to achieve its status as a sustainable and scalable company that is poised for the future.

“Without a doubt, Collaboration helped us get to where we are today. The strategic plan helped us rise above and put things in place to achieve our goals. We live by our core values in every decision we make; Collaboration got us to that point.”



Brendan Morris
CEO of Morris & Garritano

“Even two years later, our team still recognizes that our culture shifted in a positive direction after our engagement with Collaboration. We now have a highly engaged and high performing work culture, which is exactly what we were aiming for.”



Kerry Morris
COO of Morris & Garritano