
The Wheeler Agency

Company snapshot

The family-owned and operated Wheeler Agency has offered personalized service to customers in Lake City, Florida and the surrounding counties for nearly 50 years. Devoted equally to personal and commercial lines, the Wheeler Agency needed a management solution that would integrate with its existing technology and help the agency maintain a high level of service, while also reducing busywork. Wheeler found the answer in QQCatalyst.

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John Wheeler,
Owner, The Wheeler Agency

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Vertafore® Solutions:

QCCatalyst®

Proven results:

- Integration with other software boosted productivity
- Smart automation and reporting cut down on time-consuming data entry
- Simple tools and cross-functionality helped the agency go paperless

In business since 1969, the independent Wheeler Agency isn't afraid to adopt emerging technologies in order to stay productive and serve customers better.

John Wheeler grew up in the insurance industry.

His father opened a small insurance agency in Lake City, Florida in 1969, the same year that John was born. Those early years spent helping his father around the office left a strong impression on John; after graduating from Florida State, he entered the insurance industry himself. In 1990, he moved back to his hometown and began taking on more and more responsibility in the family business.

"I did it all," Wheeler remembers. "When I say all—I mowed grass, answered the phone, and opened the mail, plus I dealt with clients, ran appointments, and placed new business. You name it."

When his father retired, John purchased the Wheeler Agency and now continues the family legacy of quality and personalized customer service.

Big changes for the industry

John Wheeler has a forward-looking approach to technology. He's seen a tremendous evolution in the way it has impacted the insurance industry, primarily with the seismic shift brought about by the Internet. He says, "If you go back to when my dad first opened his doors, the agent was the

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underwriter and producer, and collected all the premiums—and it was all done on paper. Of course, now that's all online." But technology continues to evolve, and John Wheeler believes the industry is in the middle of another tectonic change.

"15 years ago there was the big shift of just getting online," he says. "Now, the push is for integration—the connectivity between one system and another."

In Wheeler's view, interconnectivity was becoming increasingly essential to independent agencies like his. To maintain the strong bonds forged with customers over the decades, the agency needed a modern, integrated management system that went beyond basic functionality and online access.

"I began my search for a new web-based client management system that could speak to all of our existing systems and help us focus on our clients more," Wheeler says. "I found QQCatalyst."

Old-school service, new technology

Choosing the QQCatalyst agency management system to replace aging software marked the beginning of a new era for the Wheeler Agency. The new system's smart automation and sophisticated reporting allowed staff to shift their focus away from data entry, towards existing and potential customers.

"In the old days, one of our most important but time-consuming jobs was to make sure every policy that was supposed to be active was actually active," Wheeler says. His staff had to physically run lists and spend a lot of their time checking off boxes on forms. With QQCatalyst, the agency can run detailed reports at the end of the month, the end of the week, or on demand, in a fraction of the time it used to take.

"It used to take 30 minutes a day to run our business-critical reports," he explains. "Now it takes 30 minutes once a month."

This efficiency has freed up valuable time, which the Wheeler Agency can use to focus on its clients. Wheeler says, "I converted the time that my staff spent double-checking policy details into time spent with customers, deepening relationships.

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When customers come in, we have time to sit and listen to them.”

Many customers have been with the agency for decades, so personalized service and proactive account management are crucial for retention.

“QQCatalyst helps us retain customers by allowing us to identify problems before they occur,” Wheeler says. “For example, let’s say a policy is renewing with a 28 percent increase in premium. I can run a report in QQCatalyst that tells me well in advance about the change so I don’t have to wait until the customer calls and is unhappy.”

Armed with the foreknowledge provided by QQCatalyst, staff can reach out to customers ahead of the premium increase and discuss options.

“QQCatalyst goes a long way toward establishing us in the role of trusted advisors in our clients’ lives.” Wheeler says.

Integration is key

For John Wheeler, the most important feature in an agency management system is integration. “The number one strength of QQCatalyst is its ability to integrate with our other systems,” he says.

QQCatalyst integrates with Microsoft Outlook, allowing agency staff to easily save any relevant email to a customer’s file. It seamlessly communicates with QuickBooks so accounting data can easily be sent to an offsite bookkeeper. It works with the agency’s comparative rater, phone app, email marketing software, and more.

Because QQCatalyst makes it easy for agency systems to “talk” with each other and for staff to capture information, the Wheeler Agency is now a 100 percent paperless office for personal lines.

“Because QQCatalyst makes it so easy and is organized very well, we’ve become a 100 percent paperless office for personal lines.”

"We have modest organic growth each year...But we have a very good traditional retention rate. I think that can be attributed to the quality of our relationships with our customers and the quality of our tools, like QQCatalyst."

John Wheeler,

Owner, The Wheeler Agency



"We don't add a single piece of paper to the customer's hard file anymore," Wheeler says. "When the phone rings, we're taking notes in QQCatalyst. We're capturing just about every conversation in one centralized, organized place. It's way better than what we had before, which was a slip of paper here and a sticky note there."

A solution for sustainable growth

With the help of QQCatalyst, the Wheeler Agency can continue its tradition of providing personalized, trustworthy service to customers in Lake City and the surrounding counties.

John Wheeler isn't interested in achieving rapid growth at the cost of high client turnover like some other agencies. Instead, he continues to build on the foundation his father laid decades ago, with the help of modern tools like QQCatalyst.

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