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Why are we here?

Serial Acquisitions Create Operational Strain

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Highly acquisitive agencies do not fail because of deal flow. They stall because their conversion integration discipline breaks down.

Common reality

- One acquisition still integrating when the next closes
- Multiple management systems active
- Carrier relationships fragmented
- Producers distracted by operational issues
- Service teams overloaded

The difference between high performing acquirers and struggling ones is integration discipline.

Core Technology Services capabilities

Managed Services

- Application Management Services
- Infrastructure Managed Services
- Data Platform Managed Services
- Automation/BOT Maintenance

AI & Intelligent Automation

- Automation Discovery & Road mapping
- Maturity & Readiness Assessment
- Systems/Data Integration (APIs, iPaaS, ETL, Virtualization)
- Custom Development (Agentic AI, ML, Workflow Automation)



Technology Consulting

- Digital Maturity & Readiness Assessment
- Strategy & Transformation
- Roadmap Technology/Platform
- Digital Experience Strategy & Design

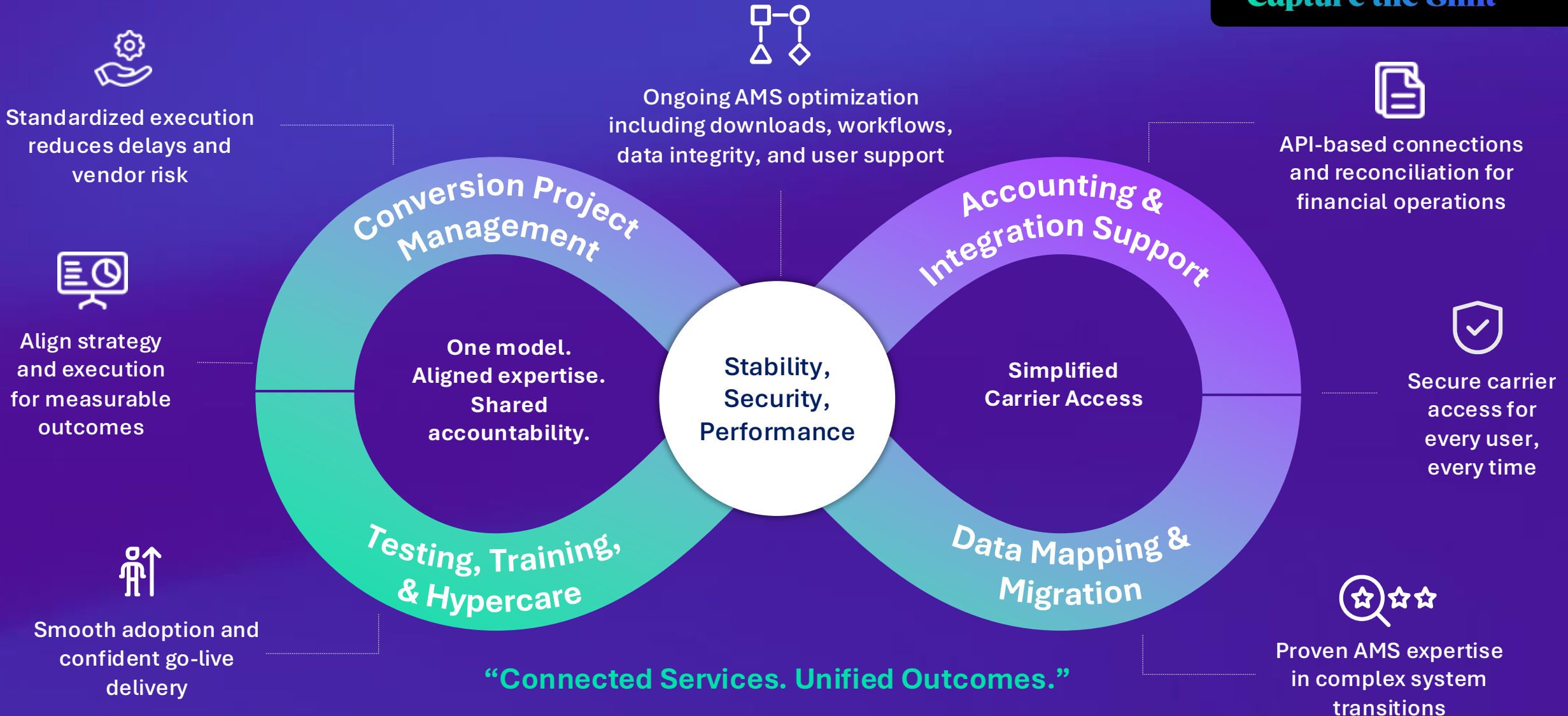
Applications & Platforms

- Core Platform Implementation
- Custom Application Development
- Systems Integration
- Digital Experience Enablement
- Cloud Migration & Development
- QA & Testing

Data Services

- Data Migration & Unification
- Custom Reporting & Dashboarding
- Data Analytics & Predictive Modeling

How Tech Services Creates Measurable Impact



Current trends & pain in acquisitions

M&A activity from January 1 – March 10, 2026

Overall Trends

73

Verified transactions identified in the first 2.3 months of 2026

33

Deals include full transaction details, with an additional 37 deals identified through buyer disclosures.

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Breakdown by target platform:

- AMS360
 - AMS360 to AMS360
 - Applied Epic to AMS360
 - EZLynx to AMS360
 - Special Agency to AMS360
 - QQ to AMS360
- Applied Epic
 - Nexsure to Applied Epic
 - TAM to Applied Epic
- Other platforms
 - Applied Epic to Sagitta
 - AgencyBloc to BenefitPoint

The conversion integration trap

Agencies often treat each acquisition as a new project instead of a repeatable process.

Typical symptoms

- No integration playbook
- Integration ownership unclear
- Lack of stakeholder alignment across teams
- Technology decisions delayed
- Carrier codes duplicated
- Teams improvising solutions

The result, complexity compounds with every acquisition.

Strategy 1: Establish an integration leader

This is where most agencies fall short

Without clear ownership:

- Integration stalls
- Decisions slow down
- Accountability disappears

Integration leader or officer handles

- Integration timeline
- Technology decisions
- Carrier coordination
- Operational alignment

The result? Clear internal accountability.

Strategy 2: Standardize the technology stack

Every acquisition introduces technology variation.

Examples:

- Different agency management systems
- Different document platforms
- Different workflows
- We've always done it this way...

Define your target technology environment.

Example components:

- Agency management system
- Document management
- Download strategy
- Reporting environment

The result? Future acquisitions follow a clear path to the destination.

Strategy 3: Manage licensing and entity compliance

If ignored, agencies risk compliance gaps and delays in writing business.

Common issues:

- Producers licensed under legacy entities
- Staff licenses tied to the wrong agency entity
- Required state notifications not filed
- Carrier appointments tied to inactive entities

Align licenses across states:

Execution steps:

- Inventory all producer and staff licenses
- Confirm the surviving agency entity
- File required state regulatory notifications
- Align carrier appointments to the correct entity
- Close legacy entities where appropriate

The result? Producers continue writing business without interruption while reducing compliance risk during acquisition.

Strategy 4: Manage licensing and entity compliance

Carrier complexity becomes a hidden integration burden.

Common issues:

- Duplicate carrier codes
- Multiple appointments
- Download configuration problems
- Adding staff becomes a burden and causes delays

Create a carrier governance process.

Actions:

- Audit carrier codes
- Consolidate appointments
- Align download configuration
- Document carrier access procedures

The result? Reduced servicing, onboarding and offboarding friction.

Strategy 5: Build a repeatable conversion playbook

Navigating multiple acquisitions without a playbook creates friction.

Types of playbooks you can create

- AMS migration checklist
- Carrier code consolidation process
- Download configuration guide
- Data migration procedures
- Operational workflow alignment

The result? Each acquisition follows the same execution model.

Strategy 5: Protect producer momentum

Integration mistakes often pull producers into operational work and away from their main focus: revenue

Create systems to reduce unnecessary pivots:

- Assign integration support resources
- Standardize onboarding steps
- Communicate system changes clearly

The result? Producers continue to sell while the conversion integration happens behind the scenes.

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Strategy Q&A

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Conversion Integration Discipline Framework

What is the value of executing a great M&A strategy?

→ Maintain producer momentum

- Keep producers focused on selling, not integration issues

→ Accelerate revenue realization

- Convert acquired business into revenue faster

→ Identify gaps early

- Surface operational, data, and carrier issues before they scale

→ Reduce operational strain

- Avoid system sprawl, duplicate workflows, and team overload

→ Improve integration speed and consistency

- Execute each acquisition with a repeatable model

→ Reduce compliance and regulatory risk

- Align licensing, carrier contracts, and data controls early

→ Strengthen carrier and client experience

- Reduce friction in onboarding, servicing, and access

A Repeatable Conversion Integration Framework



Most agencies lack an operational model that keeps things simple

We assist in developing the organizational discipline that will:

- Align leadership
- Discover operational reality
- Design the conversion integration plan
- Deliver through a repeatable process

This model enables consistent execution across every acquisition

What Repeatable Conversions Look Like

1

Align

- Define integration ownership and governance
- Align leadership, stakeholders, and objectives
- Confirm target operating model and success metrics

2

Discover

- Assess current systems, data, and workflows
- Identify carrier, licensing, and operational gaps
- Document risks, dependencies, and constraints

3

Design

- Define target technology and workflow model
- Build conversion and carrier alignment plan
- Establish timelines, roles, and execution plan

4

Deliver

- Execute AMS migration and data conversion
- Align carriers, workflows, and reporting
- Stabilize operations and complete integration

Every acquisition follows the same model, driving consistent outcomes and reducing complexity.

Case Study – Agency X

Agency X completes 10 acquisitions over three years.

Before integration discipline

- Four management systems
- Hundreds of carrier codes
- Servicing inefficiencies

After structured integration

- Single AMS environment
- Carrier codes consolidated
- Faster onboarding of acquisitions

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Takeaways

Turning M&A Into a Scalable Growth Engine

When thinking through your next acquisition, keep these things in mind

- Treat integration as a strategic capability
- Establish clear integration leadership
- Standardize the technology environment
- Implement carrier governance
- Build repeatable integration playbooks

Agencies that scale through acquisitions do not rely on deal velocity alone

They build integration discipline that allows growth without proportional operational strain.

We are here to support you through this process as an extension of your team

Contact us

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Learn more about ReSource Pro's Technology Services offerings for our Retail clients here: <QR code to TS retail page>

Thank You!

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