

ZYWAVE CASE STUDY

Stamps-Walker Agency

Location

McRae, Georgia
Eastman, Georgia

Success with

- Partner Platform
- TAM Conversion to Partner Platform

Agency Makeup/ Focus

- Personal
- Commercial



BACKGROUND

Stamps-Walker Agency is a proud, multi-generational insurance firm rooted in McRae, Georgia, with a legacy dating back to the early 1900s. Family-owned and operated for over a century, the agency is led by husband-and-wife team Brian and Caitlin Walker. Serving clients across Middle Georgia, the agency operates from its main office in McRae and a secondary location led by Clint Williams in Eastman, offering convenient access and personalized service throughout the region.

With a close-knit, experienced team, Stamps-Walker supports over 1,500 active clients across both personal and commercial lines. The agency's success is grounded in its deep community ties and a longstanding commitment to trust, service, and relationships—embodied in their motto: *"You know our family, and we'll treat you like family."*

PROBLEM/OPPORTUNITY

For many years, the agency relied on TAM (The Agency Manager), a system developed in the 1980s. It had been a reliable cornerstone of their operations, and long-time team members knew it well. But as technology advanced and business needs evolved, the limitations of the platform—especially around modern functionality and workflow efficiency—became increasingly clear. Rising costs further amplified these issues.

At the same time, TAM began actively encouraging users to transition to another system. By this point, it had become clear to Stamps-Walker Agency that remaining on TAM was no longer a sustainable long-term strategy.

*"The platform just made sense. It's cleaner, easier to navigate, and everything we need is finally **in one place.**"*

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SOLUTION

The real challenge lay in finding the right replacement. The agency needed a modern platform that offered intuitive technology, robust functionality, and ease of use—without compromising the features essential to their operations. From accounting to managing diverse lines of business, the new system had to do it all.

After evaluating several solutions, Stamps-Walker Agency found their answer in Zywave's Partner Platform. Not only did Partner Platform meet all their functional needs, but it also came at a significantly reduced cost—up to 61% less than TAM. The choice quickly became clear: a smarter, more cost-effective solution with no trade-offs.

Of course, switching systems is no small task—especially when valuable client data is involved. But as Caitlin put it, *"The transition was easy."* Thanks to the assistance of Zywave's dedicated onboarding and success teams, the process was smooth and well-organized. Zywave representatives clearly outlined what data would transfer, ensured that critical information was handled with care, and guided the agency through each step—all without disrupting day-to-day operations.

By converting to Zywave, Stamps-Walker Agency gained a modern, user-friendly system with built-in accounting, full support for personal and commercial lines, and the peace of mind that comes with a forward-thinking platform. The move also brought meaningful cost savings, allowing the agency to reinvest in growth and client service. Most importantly, Stamps-Walker Agency preserved what mattered most—the ability to keep serving their clients like family, all while stepping confidently into the future.

*"Having everything in one place—especially the visual reporting—has made tracking our business so much easier. **We can actually see where we're growing now.**"*