

ZYWAVE CASE STUDY

From Outdated to Efficient:

Gerhart, Hartman & Ritner, Ltd Insurance Modernizes Operations with Partner Platform

**LOCATION**

Boyertown, PA

**SUCCESS WITH**

Partner Platform

**AGENCY FOCUS**

- Personal Lines
- Commercial Lines
- Life & Health
- Employee Benefits
- Annuities

BACKGROUND

For more than a century, Gerhart, Hartman & Ritner, Ltd Insurance has been a fixture in southeastern Pennsylvania—family-owned, community-rooted, and built on relationships that span generations. From their main office in Boyertown to locations in Red Hill, Emmaus, and Harleysville, they serve clients across personal and commercial P&C, life and health, group benefits, annuities, and even title and tag services.

Rachel Fisher, Gerhart, Hartman & Ritner, Ltd's Accounting & Marketing Manager, is the kind of person who keeps an agency running. Four years in, she owns accounting, marketing, and HR—and when it came time to find a better AMS, she was right in the middle of it.

CHALLENGES

Gerhart, Hartman & Ritner had been on another agency management system for years, but the relationship had grown strained. Costs kept climbing on a bundle the agency was not fully using, and everyday tasks were more complicated than they needed to be. Rachel was direct about it: "They kept jacking up their prices. A large portion of why we switched was the price difference."

Reporting was its own headache. "You could spend 20 minutes trying to pull a report and you're like, what is happening? What am I missing?" The data wasn't always reliable either — leaving Rachel with more questions than answers after every pull.

*"It just seemed like an easier system to use—honestly, it was a **no-brainer**."*

Rachel Fisher

Account & Marketing Manager,
Gerhart, Hartman & Ritner, Ltd.

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Change is never easy — especially at an agency where some team members have been around for 20, 30, even 40 years. The owners had real concerns: would the data move over cleanly, and would a long-tenured team actually embrace something new?

SOLUTION

When Gerhart, Hartman & Ritner sat down for a Partner Platform demo, something clicked. The accounting module was the moment that sold it for Rachel: “I was more wowed by that.” Fewer clicks, cleaner logic, a dashboard that finally made sense. For an agency not getting full value from its previous provider’s pricing, it was, as Rachel put it, “just kind of a no-brainer to switch over.”

A dedicated Zywave onboarding coordinator guided the team through go-live from start to finish. Post-launch, Rachel has made Zywave University and the support chat part of her regular routine — “very helpful and responsive,” she said. Her advice to others weighing the switch: “Ask every question, even the obvious ones. The worst thing is moving over and discovering something critical isn’t there.”

RESULTS

Gerhart, Hartman & Ritner, Ltd went live in April 2025—and the relief was immediate. Data migrated cleanly. And the team? “Nobody quit,” Rachel said with a laugh. Reports that once took 20-plus minutes in their previous AMS, now pull in seconds. Two agents text clients from Partner Platform every single day, each with their own dedicated line, and notes, activities, and the dashboard have become the backbone of how the team manages relationships.

Rachel’s takeaway for agencies still on the fence: “I would definitely recommend it — especially for an agency coming from [a competing AMS].” With the agency now exploring Zywave Sales Cloud for email campaigns and eyeing more tools across the Zywave portfolio, Gerhart, Hartman & Ritner isn’t just modernized — it’s positioned to keep growing.

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