



How IMA Transformed Disruption into a **Stronger Client Partnership**

Story Overview

A large, multi-state contractor in the janitorial and landscaping sector faced disruption during a period of transition on both the client and IMA teams. As the relationship evolved, the client moved more than half of its property and casualty program to another broker.

In response, IMA focused on re-establishing alignment, strengthening engagement, and demonstrating value quickly. The goal was not only to preserve the remaining business, but to rebuild trust and earn the partnership back in a complex risk environment.

Challenge

The transition exposed a gap in the client experience. The insured no longer felt they had the level of support they needed, and awareness of IMA's broader resources and capabilities remained limited. At the same time, the client's complex risk profile constrained carrier options and created frequent litigation exposure.

With a significant portion of the account already moved, IMA needed to rebuild confidence, deepen engagement, and maintain continuity on the remaining policies.

IMA's Strategy and Actions

IMA's client team acted to support the client by:

- + Conducting internal and client-facing debriefs to identify gaps and reset expectations
- + Reintroducing the IMA Client Experience Team to improve access to and coordination of available resources
- + Delivering proactive analytics, including loss trend reporting tied to cost drivers
- + Improving turnaround times for requests tied to bidding and operations
- + Expanding risk control support aligned to the client's footprint



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Why It Worked

IMA rebuilt trust through consistent engagement, improved responsiveness, and greater visibility into the resources available to the client. By connecting the insured with a broader, more integrated team, IMA delivered more proactive guidance, faster execution, and insights that extended beyond policy placement.

The result was a stronger partnership built on both service and strategic support.

Key Takeaways

Strong client relationships require ongoing attention, particularly during periods of organizational change. IMA recognized that the challenge extended beyond program structure to client confidence and took deliberate steps to strengthen both.

By increasing the client's awareness and use of IMA's broader capabilities, the team deepened engagement, improved the client experience, and reinforced the long-term value of the partnership.



THE RESULT:

The client returned most of the business, representing about \$300,000 in recovered revenue. IMA also achieved an 18% net decrease in workers' compensation premium despite payroll growth.

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