



# How George Petersen Insurance Scaled Responsibly with Edge

A \$43M independent insurance agency eliminated bottlenecks, streamlined workflows, and restored balance by building a dedicated backend team through Edge.



**George Petersen** Insurance Agency

## Employees

101–500

## Location

11 offices across Northern California

## Edge Talent

5 dedicated backend team members

## Key Results



Workload Reduction

**26–40%**



Faster Recruiting

**51%**



Satisfaction Rating

**5/5**



Higher Efficiency

**10–25%**

## About George Petersen Insurance Agency

George Petersen Insurance Agency is one of Northern California's leading independent agencies, with expertise in Commercial Lines, Personal Lines, and much more. With more than \$43 million in annual sales, the agency is known for its client-first approach and long-term relationships - but rapid growth and acquisitions began straining internal resources.

### Challenge

*"We were losing that work-life balance for our staff. That's just difficult for everybody."*



Kathy Heglin | Commercial Lines Service Manager

Rapid growth and multiple acquisitions had stretched George Petersen Insurance to its limits.

Manual data migrations, certificate backlogs, and policy audits overwhelmed internal teams. Recruiting skilled insurance staff locally had become slow and expensive — and post-COVID, nearly impossible.

Core bottlenecks included:

- Stretched thin with new business policy audits each month
- Delays in certificate issuance across offices
- Long onboarding cycles for new hires
- Coverage gaps in personal lines
- Rising costs for in-office staff with limited RO

Hiring locally proved slow and costly — and after COVID, finding skilled insurance staff became nearly impossible.

### The Edge Solution

When traditional recruiting couldn't keep pace, George Petersen turned to Edge to build a dedicated backend team — not to outsource work, but to extend their operations responsibly.

Edge's full-service operating model goes beyond staffing. It combines global recruiting, compliance, IT, onboarding, and HR management into one secure, managed platform — so agencies can scale confidently without added administrative burden.

Edge's model allowed the agency to select and directly manage professionals trained in U.S. insurance workflows, EPIC systems, and compliance requirements.

### Why They Chose Edge

- Dedicated team members, not a shared talent pool
- Top-tier talent screening and matching, with complete control over final hiring selection
- Spanish-speaking associates that aligned with U.S. business hours
- Insurance-trained professionals familiar with EPIC and agency workflows

*“The thing that made Edge stand out the most for me was that the people we worked with were specifically for our agency. It wasn’t our work being sent to a pool of people — we had specific people that worked with us.”*

*Kathy Heglin | Commercial Lines Service Manager*

### How Edge Works

Edge’s process enabled George Petersen to scale quickly, securely, and without operational disruption.

1

#### Screen & Certify

Edge identified, vetted, and certified professionals with insurance experience and platform expertise.

2

#### Match

The agency interviewed top candidates and selected their new team members directly.

3

#### Operate

Edge managed compliance, IT, onboarding, and day-to-day workforce operations, allowing George Petersen to focus on client service.

*“Because they are dedicated to us, it’s like adding employees anywhere — where they are doesn’t matter. Good work knows no boundaries.”*

*Kathy Heglin | Commercial Lines Service Manager*



## Results and Impact

Since bringing on Edge Talent, George Petersen has seen significant improvements:

Metric	Before Edge	After Edge
Time to Recruit Staff	Lengthy hiring cycles	51% faster hiring
Certificate Unit	Understaffed & backlogged	Fully staffed and on schedule
Office Workload	Overextended teams	26–40% workload reduction

**Fully staffed certificate unit for the first time**

**Faster, smoother onboarding than local hires**

**Significant efficiency improvements across multiple departments**

**Internal morale and balance restored**

With Edge’s dedicated team model, George Petersen achieved full staffing in critical backend roles for the first time. Their internal teams gained time, focus, and balance — while client service levels stayed high.

## Build Your Own Flexible Workforce

The George Petersen story proves that scaling doesn't have to mean compromise. With Edge, agencies combine local leadership with global, compliant teams that deliver the same quality, security, and accountability — at scale.

Edge helps insurance agencies expand capacity without increasing overhead, so their teams can focus on clients, not coverage gaps.



*"If we had not partnered with Edge, our staff would still be overworked and struggling to find employees. We just wouldn't be providing that good work-life balance that we want for our staff. Take the leap - you will not be disappointed"*

**Kathy Heglin | Commercial Lines Service Manager**

Interested in building your  
remote insurance team?

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