

## CASE STUDY

## Insurance Comparison Company

The Zebra, the nation's leading insurance comparison company, knows that insurance is complicated enough. That's why when the company was founded in Austin, TX in 2012 it put one simple goal in place: to simplify insurance.

Over the past nearly nine years, that's exactly what The Zebra has done. From its initial entry into car insurance, where it can compare options from more than 200 auto insurance providers in less than 60 seconds, to its recent expansion into homeowners insurance (and future plans including renters, RV and boat insurance), The Zebra is making it easier for customers to understand their insurance needs through every stage of life.

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As part of the financial services industry, insurance companies are bound by significant compliance standards. The Zebra works within a variety of regulations including the New York Department of Financial Services (NY DFS), the California Consumer Privacy Act (CCPA), System and Organization Controls (SOC) 2 Type 1 and Type 2, and Payment Card Industry (PCI). According to Haley Ackerman, the company's Senior Compliance Manager, "The Zebra is very sophisticated in terms of the types of standards we work within and the audit and evidence information we gather. What I quickly realized after coming on board was that we needed a GRC platform that was equally sophisticated, yet simple to deploy and use, all while making customer support a priority."

### The Challenge

Ackerman joined The Zebra in January 2020 in the first dedicated compliance role at the company. With a background that combined legal and retail technology implementation, she was uniquely positioned to help The Zebra with its compliance needs. It didn't take long for her to notice that while the organization had simplified insurance for its customers, gathering and tracking compliance data was harder than it needed to be.

"We were really starting with a clean slate to build upon. We had compliance processes in place, but we didn't have a way to automate, track or operationalize compliance in a way that considered the size and valuation of our company."

The Zebra was already working within some of the most stringent compliance standards, yet evidence gathering was a manual task that was then housed in rudimentary spreadsheets. Ackerman was responsible for maintaining, accessing, and ensuring that this mass of data was gathered and available for audits. "While I do love a good spreadsheet, having 15 of them with multiple tabs and information to cross reference from sheet to sheet was just not a long-term strategy for compliance success."

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On the hunt for a governance, risk and compliance (GRC) tool, fate in the form of a marketing email intervened. “The Zebra was already a very happy KnowBe4 security awareness training client. One day I received an email about the other tools that KnowBe4 provides and was immediately interested in its GRC platform, KCM GRC.

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### A Simple Choice

When the time was right to move forward with a GRC platform, Ackerman pulled out the marketing email she had held on to. “I thought that KCM looked like it was the right size for our company. It seemed like I could use without much help, which was important because I was a team of one at the time.”

Before presenting options to her boss, Ackerman did two things: evaluated other GRC vendors and dug further into KCM from KnowBe4. “Even though I knew I needed to look at other offerings, I started vetting KCM immediately and it was very clear to me that it was going to be the right fit for us. We already knew how great it was to work with KnowBe4...the customer service was fantastic and the people were really responsive. That was a known quality for us. I wanted to work with someone who would answer our questions and be incredibly helpful and knew that KnowBe4 was already the right match there.”

Despite her leanings toward KCM, Ackerman dug in on competitive offerings. “I’m not in the business of wasting money and it was immediately clear from scratching the surface on other offerings that they were either excessively robust or just so expensive that I could not have justified them.”

Ackerman pulled together a 15-slide pitch deck for her boss to present KCM as her choice. “It was the easiest sale I’ve ever made. My boss literally said, ‘KCM is a no brainer. Send me an invoice.’ I had made it through only about three slides.”

### Onboarding Made Simple

Once the choice was made, Ackerman and KnowBe4 began onboarding KCM at The Zebra within about three hours. Within three days she had uploaded all of the company’s controls—now more than 180 of them—into KCM. The Zebra’s onboarding process, in fact, was complete before Ackerman was able to have her intro call with her support team.

“KCM was just so intuitive. The ease of set up and clarity of direction were amazing. Because it was so clear what we needed to do with the tool, KCM was immediately impactful. Once we loaded our controls in, everything snapped into place.” This was important to Ackerman because not only was KCM intuitive to set up, but once the company populated it with their own data, it became a custom solution specifically for The Zebra.

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Out of the gate, The Zebra began using KCM's Compliance Management and Vendor Risk Management modules and is working toward completing the Policy Management and Risk Management modules. Importing the compliance data into the Compliance Management module was streamlined and simple and Ackerman reports a "day and night difference" in how their vendor questionnaires—used to vet third-party vendors—are completed.

*"With KCM Vendor Risk Management, we have automated running our vendor questionnaires through the platform, which has been unbelievably helpful. The back and forth between our company and potential vendors is automatically gathered and logged, which really makes it simple to prove we've vetted all vendors."*

Throughout the whole process, customer service remained one of the top criteria for Ackerman. "The customer experience with KCM has been the absolute best I've ever encountered. I've worked with more than 100 tech vendors throughout my career and have never had the responsiveness and what felt like one-on-one accessibility to customer support. Our account rep has absolutely killed it."

## Simply Great Results

The Zebra is in what you would consider a "building year" with regard to audits. Ackerman and her team, which has grown from one member to three, are putting the pieces together in advance of their next audit cycle so they can use KCM instead of other tools and spreadsheets. "It was important to us that the evidence we gather and the structure of our assessments belongs with us instead of being in a third-party repository. Our next round of audits will be so much simpler because with KCM we will be able to systematically gather evidence rather than the sudden rush of having to do it at one time."

Coming from a legal background with a focus on retail and financial compliance, it's no surprise that Ackerman is able to clearly articulate the most important results KCM has brought to The Zebra:

- 1. Ease of use.** "KCM is so easy to set up. So easy to map. So easy to use by anyone. You don't have to be a database expert to set it up and make it work. KCM made an immediate impact on our organization."
- 2. Customer service.** "It's so rare to find good customer service, much less great customer service. As existing KnowBe4 customers, we were aware of just how focused the company is on customers, but our experience with KCM went above and beyond. It felt like we were the only client on our rep's list, which is unheard of in customer support. And, the icing on the cake? Even KCM's documentation is fantastic."
- 3. Overall visibility of the tool.** "With a quick glance at the dashboard I can see where things are across a lot of verticals and map them together for our management team. It's very hard to show execs a bunch of spreadsheets and illustrate what's going on. KCM has made it very simple to see where we need to focus our attention and identify where we need to do work."

Ackerman's experience with KCM GRC has been so strong that she's recommended the platform to other organizations and has even acted as a reference for the company. Simply put, she says: **"I cannot speak more highly of KnowBe4."**