

HUB International scaled a fast-growing enterprise with monday.com

Meet HUB International

The landscape at HUB International is vast. With more than 20,000 employees across employee benefits, property and casualty, and retirement and wealth planning — plus EB specialty practices spanning workforce technology, wellness, pharmacy, analytics, and risk and compliance — our organization operates at a significant scale and with considerable complexity. Coordinating work across this footprint requires visibility, alignment, and systems that truly connect.

On top of this, growth is central to HUB's strategy, with the acquisition of 50+ brokerages each year.

And with that pace of growth comes operational complexity.

The challenge

The decentralized structure is intentional. Your HUB regional offices operate autonomously, allowing teams to move quickly and serve their markets well. But as acquisitions increase, so does variation. Each new agency brings its own systems, processes, and operating habits.

For the EB division at HUB, managing a client isn't a once-a-year renewal. It's a year-round lifecycle of compliance deadlines, strategy sessions, reporting, plan changes, and coordination across specialty teams. Some clients require more than 80 tasks annually — distributed across multiple team members. Every one of them matters.

Before monday.com, there was no shared system governing how that work was managed across brokerages. Teams relied on spreadsheets, Post-it notes, and local processes. As acquisitions increased, so did inconsistency. Client status looked different depending on where you sat. Accountability depended on individual habits. Risk wasn't always surfaced early.

The Employee Benefits team didn't need another task list.

They needed operational control — without sacrificing decentralization.

The solution

Why monday.com

The EB Best Practices Committee heard the ask: find a system to help manage tasks, communicate data, and track assignments and work distribution. They were tasked with finding a platform that could create consistency across regions while fitting into the decentralized model.

Airtable had been used within specialty practices, but it was difficult to report from, hard to govern at scale, and lacked the visibility that leadership needed. The committee evaluated multiple platforms. Monday.com stood out because it provided structure, with the ability for each HUB to customize based on their operations, and visibility across teams to reduce redundant data sharing and communication burdens.

It gave the team a foundation that was applicable across agencies.

How the team uses monday.com

1 Client lifecycle management

The first use case built with monday.com was foundational: standardizing the client lifecycle.

A subset of the EB Best Practices Committee built a lifecycle template in monday.com that any brokerage could adopt and tailor based on market, client size, and renewal timing. Instead of relying on personal spreadsheets and memory, teams now operate from a shared system - with clear ownership, visible dependencies, and dashboards that surface overdue work early.

"It's so nice to come into work every day and have your to-do list waiting for you," Natalie Canestro, Director of Technology Strategy and national monday.com SME, says. **"Employees don't wake up at five in the morning panicking about what I might have forgotten."**

As new agencies join HUB, they don't have to reinvent how client work gets done. They have a tool with a proven framework - and adapt it locally.

2 Reporting

Before monday.com, visibility into team progress depended on conversations. Managers would ask for updates and rely on what they heard - without a clear, real-time view of how work was actually progressing. Issues often surfaced too late.

With monday.com dashboards, that changed.

Leaders can now see exactly where work stands across teams in real time - including where delays are building, where workloads are uneven, and where support is needed. Instead of reacting to problems, they can anticipate them.

"Dashboards have become a crucial planning tool," says Bailey Broadus, EB Practice Leader. **"They help identify when teams are at capacity and when additional headcount is needed."**

3 Client retention

As business growth accelerated, leadership needed clearer visibility into retention risk across regions. Previously, insights into why businesses were at risk - or lost - were fragmented and often surfaced too late.

In January 2026, HUB launched at-risk and lost-business reporting on monday.com. Teams submit structured data through a form, capturing the reason, revenue impact, and context. Real-time dashboards transform that data into clear visualizations, giving leadership an at-a-glance view of what's at risk across agencies - by reason, by region, and by financial impact.

The shift changed the conversation. Instead of reacting after losses occur, leaders can spot patterns early - whether it's a change in client leadership, service gaps, or resource constraints - and respond proactively.

"It gives us information that's actionable instead of guessing," Brittney Holdaas, National EB SRM, says.

Impact

Work that once lived in spreadsheets and personal tracking systems is now visible and measurable across brokerages.

Account teams have clearer ownership. Managers identify workload imbalances earlier. Leadership sees retention risk in real time - not after revenue has already been impacted.

Reporting no longer depends on internal build queues. When leadership wants to track something new, the team builds it immediately and adapts as needed.

HUB leaders commented, **"The amount of efficiency it brings - and the ability to manage better because you can measure information."**

In a company acquiring dozens of agencies each year, that ability to measure - and manage - is what makes growth sustainable.