

CASE STUDY

PROPERTY CASUALTY INSURANCE COMPANY Insurance

"The Alithya team made us feel comfortable with their understanding of the insurance business. They came on site to provide a demo of Microsoft Dynamics 365 and showed us how easily it could be configured to achieve our goals. Within hours, they built a prototype showing us how we could get everything accomplished within Dynamics 365."

IT Services Leader

The insurance company is a regional property and casualty insurer with a focus on multifamily, student, and affordable housing as well as commercial real estate. Through a network of independent agents, it serves policy holders with a full complement of commercial insurance products and services.

With a need to serve 2 groups of customers - insurance customers and agency partners who provide the company with all its business - the organization required the ability to efficiently track agents, agencies, and their appointment by the company to be allowed to write business for it. To be able to write business for it, agencies and agents first must be licensed by the state and then reviewed and appointed by the company. As the company is monitored by the state as an insurance carrier, it needed to ensure all agents writing business on its behalf are appointed and licensed.

Once the company decided to appoint these agencies and agent users, the onboarding process was completed manually.

Gathering the necessary documents was done over the phone/via email, and tracking information was all on a spreadsheet. With almost 3,000 agency users, there was no good way to track and maintain the data, which got stale quickly.

Key Benefits

- > Improved efficiency of managing agency channel (3,000+ agents)
- > Shortened licensing process for a 10-person agency from 3 ½ hours to 1 hour
- > Integrated access to information about agents who should no longer be appointed, eliminating unnecessary payments
- > Gained 20% efficiency in onboarding process
- > Ensured compliance of agency licenses and appointments - previously required a team of 3 full time employees
- > Improved end-customer focus

Amidst dealing with these business challenges, the company also had the desire to focus more on end-customers and felt a CRM system was on its future roadmap, so it decided it was the right time to move forward with an implementation.

The Right Fit

Prior to determining it would move forward with a CRM system, the company evaluated other products such as distribution management systems, designed specifically to manage agencies and appointments, but the systems were very specific and could not provide all the benefits of a CRM system. Since the company determined it would ultimately need a CRM system in the long term, it decided to go ahead and leverage one to handle the process for agencies and appointments.

When deciding which CRM would be the right fit, the company considered Microsoft Dynamics in addition to other solutions. As the company is already on the Microsoft platform with tools such as SharePoint and Office365, the team felt comfortable staying on the same platform where Microsoft Dynamics 365 would integrate seamlessly. In addition, the company found Microsoft's licensing model appealing as it matched its long-term rollout strategy of having the ability to add and remove licenses monthly.

Selecting an Implementation Partner

After determining it would move forward with Dynamics 365, the company next had to select a partner to implement.

As the company had worked with Alithya's Digital Team in the past to build its agent portal, Alithya was brought in during the RFP process to provide a demo.

Alithya came on site and showed the team how easily Dynamics 365 could be configured to achieve their goals. The Alithya team showed they understood the insurance business and built a prototype in mere hours to show how everything the company wanted could be accomplished.

Tangible Improvements Gained

The company and Alithya moved forward with two phases of the implementation. The first encompassed the Dynamics 365 Sales module for agency licensing, a portal for new agents to register, and marketing automation. The goal of the second was to ease the burden of the previously manual agency onboarding process by integrating with a third-party database that provides state licensing and appointment information.

Since the completion of these phases, the IT Services Leader, conversed with the business users at the company and found the licensing process for a 10-person agency has dropped from three and a half hours to one hour, and the company has gained 20% efficiency in its onboarding process, which is now automated and no longer requires phone interviews. Dynamics 365 has provided the ability to efficiently onboard agencies who sell its policies, supporting its agency sales channel.

Per the IT Services Leader, "In addition, we now have something we did not have before, which is an automated process to keep our record of appointments and licenses up to date. Now, we can head off any compliance issues, so that's a big deal. With our old, manual process, that would have been near impossible. We would have needed a team of three people full time to keep everything up to date, which is a huge ROI. Previously, we would not be aware if a license was canceled by the state. We could potentially allow an unlicensed agent to write business for us, which is a huge compliance risk."

The company has already seen a cost saving since implementing Dynamics 365. Since it pays for each of the 3,000 agents it appoints, the daily automated updates will cut wasteful spending by remove agents from the appointment log as soon as their license expires.

Working with Alithya

"Alithya is a true partner who has offered creative solutions throughout the implementation. An example of this is in phase one - our original plan was to use DocuSign forms to gather information from agencies during onboarding. We found this didn't provide the flexibility we needed, so Alithya proposed a portal - a web form that would feed the data directly to Dynamics 365, increasing our productivity," IT Services Leader.

He continues, "In the second phase, Alithya shined. We were working with a third-party vendor to provide the database that maintains the state licensing and appointments. We needed the database to integrate with the agent portal and Dynamics 365, but the vendor was primarily concerned with its software and implementation. Alithya instead looked at the whole project, taking a holistic view, and worked to blend the software and business process into a complete solution, instead of solely focusing on the Dynamics 365 and agent portal implementations. While the third-party vendor knew changes to Dynamics 365 would be required to integrate, it was not interested in the overall solution, so we reached back out to Alithya to help and its team gave us exactly what we needed, which was someone to look out for the whole."

"Alithya completed everything on time and on budget. If additional scope was added, Alithya was flexible when working through the change order process. We really had no issues with its team at all throughout the project.

They were a true partner to us and worked towards a complete solution from our perspective. Alithya is not just implementing software; the team provided us with best practices and our business users latched onto its Customer Owned Rapid Engagement (CORE) methodology," – IT Services Leader

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IT Services Leader

Alithya is a leading strategy and digital technology company with over 2,000 highly skilled professionals delivering solutions across Canada, the US and Europe. Alithya's Microsoft practice covers a wide array of capabilities including Dynamics, Azure, business analytics, digital solutions, advanced analytics, application development and architecture. Focused on business outcomes, our combined companies have delivered Microsoft ERP, CRM, BI and digital solutions to over 1,200 clients. Alithya's global offering is to deliver strategy and digital technology services.

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