



Vertafore™

Unleash your potential

Success Story

Burns & Wilcox

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Working together to make technology decisions that will support the company's larger business strategy.

It was years ago when executives started to realize that decisions made in a vacuum, or in the absence of adequate information from all invested parties, are typically bad decisions at the end of the day. That's when the cross training and building up of multi-discipline teams started. We hear about the alignment of business and IT at every turn, and today, IT and business executives across the insurance industry are trying to work together to make technology decisions that will support the company's larger business strategy.

Building a Business

Based in Farmington Hills, Michigan, Burns & Wilcox is North America's largest managing general agent (MGA) employing more than 900 people in 36 offices across 24 states. Founded in 1969, Burns & Wilcox is a subsidiary of H.W. Kaufman Financial Group Inc. and nationally recognized for its insurance underwriting and brokerage expertise in specialty lines, professional and commercial liability, personal lines, property, reinsurance and premium financing.

While Burns & Wilcox was building the business, opening offices and establishing significant expertise in the insurance marketplace, they also were creating a complex IT situation due to the infrastructure required to support multiple locations, employees and lines of business. With more than 30 offices working independently, business processes were inconsistent, and policy file documents could not easily be shared between offices or even among employees in the same office.

"The technology decisions for a centralized consolidated technology infrastructure and application delivery model is in direct support of the company's business strategy," said Irene Naida, vice president of branch development and technology strategy for Farmington Hills, Michigan-based Burns & Wilcox. "The strategy requires technology solutions to enable standardized business processes as well as shared services and consolidated information. The strategy requires an agile, stable, secure and reliable technology environment."

Standardizing workflows, processes, systems and technology between branches was an obvious priority for Burns & Wilcox as the company looked to technology to enable continued growth.

Taking the Plunge

Understanding the value of business and IT alignment, executives at Burns & Wilcox established a multi-faceted team to determine necessary specifications, make recommendations and compile a short list of vendors that could help them



Irene Naida, Vice President of Branch Development and Technology Strategy

Agency Snapshot

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Vertafore Solutions

- ImageRight

Proven Results

- Consolidated 36 offices onto a single workflow in less than two years
- Accomplished—80 percent standardization of business processes across all offices
- Streamlined business processes and eliminated the need for duplicative data entry
- Achieved measurable ROI at individual office locations within three months of implementation
- Offices increased productivity and are able to provide a higher level of customer service
- Reduced operating costs by external storage, cutting printing, paper and file maintenance expenses

“[After ImageRight] Offices are seeing higher levels of productivity and providing a higher level of service”

— Irene Naida, Vice President of Branch Development and Technology Strategy

consolidate the workflows, processes and systems for all offices into a more cohesive and collaborative system.

The project team included individuals from the vice president of branch development and technology strategy to internal IT employees and a business steering committee made up of branch managers and senior underwriters who were not about to base such an important decision on reputation alone. The company sent out a formal RFP and even piloted another product for three months before determining that the ImageRight system was a better fit. It provided a consistent and modern technology platform for all offices, and the ImageRight personnel brought expertise in the insurance industry as well.

Implementing for Success

“The implementation process began in early January 2007,” said Naida. “We began with workflow development since our business process definition was already complete. The first office was implemented at the end of January 2007, and we completed implementation of the 26th office at the end of January 2008. By year-end, all Burns & Wilcox’s offices, including corporate headquarters, will be online... After the first four offices, we reviewed the workflow and made modifications to streamline the workflow.”

Since few companies have the luxury of starting from scratch when it comes to technologies and systems that run the business, it is often necessary for new systems and vendors to integrate with existing, in-house systems. At Burns & Wilcox, integration with the company’s existing policy management system, ConceptOne, and of course, Microsoft Outlook, was necessary to streamline

the business processes and eliminate the need for duplicative data entry.

“We were able to design standard business processes and implement an automated workflow to enable a common, consistent service delivery methodology,” said Naida. “Our offices’ policy files are no longer kept in paper files and are organized in a consistent way. Offices use a common business process for processing policy files, and all our employees, with the appropriate security access, have the ability to update and view files regardless of their location.”

Extensive training was conducted to make certain Burns & Wilcox’s employees could manage the system for optimum efficiency. Initially, ImageRight provided, stand-up training, and two weeks on-site support for all offices, with a focus on creating internal experts at Burns & Wilcox that can train staff at the remaining offices. Eventually, Naida indicates Burns & Wilcox’s goal is for all new hire training to be done through the company’s online learning management system—The H.W. Kaufman Institute. Burns & Wilcox has developed several proprietary courses to train employees on the system.

It takes about three months for an office to be proficient and to begin to see benefits,” said Naida. “Within those three months, we can see productivity gains at each office translating into ROI.”

Eliminating Duplication

Burns & Wilcox has realized many efficiencies since implementing the ImageRight system throughout their branches. In fact, Naida indicates that “offices are seeing higher levels of productivity and providing a higher level of service” since employees are

no longer hindered by having to search for paper files. Additionally, agents on the phone are able to get answers immediately and employees can easily add documents to any file they are authorized to handle.

“The workflow enables us to measure productivity against defined productivity standards,” said Naida. “Also, the departments located at corporate headquarters no longer need policy files copied and sent to them. We are already seeing reduction in operating costs as a result of no file clerks, external storage, printers, paper and ink supplies. In addition, we are able to provide support services from any of our 36 locations.”

While Burns & Wilcox is still measuring the results of the ImageRight implementation against internal productivity standards, it is clear that they are pleased with the results so far.

“Early offices are accomplishing the measures, such as delivery of quotes and issued policies, within one to two days after receipt,” concluded Naida. “We have accomplished about 80 percent standardization of business processes in the offices.”

Consolidating more than 30 offices on to a single workflow has not been an easy task, but the success of the ImageRight implementation has inspired Burns & Wilcox to look toward the future and additional functionality they would like to have to support further business growth.

“Our next step is to conduct business process design for departments located at corporate headquarters,” said Naida. “ImageRight has been an excellent implementation partner. Our branches are already coming up with ideas to implement additional features and process improvements that can be enabled by the technology.”



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11724 NE 195th Street
Bothell, Washington 98011

800.444.4813
vertafore.com

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