



Vertafore™

Unleash your potential

Success Story

Indiana Farm Bureau

Indiana Farm Bureau



Ken Emerson, Manager, Mutual Systems

Agency Snapshot

Indiana Farm Bureau earns an A.M. Best financial rating of “A” (Excellent) for United Farm Family Mutual Insurance Company and UFB Casualty Insurance Company, reflecting favorable operating performance, excellent capitalization, and strong personal lines market presence in Indiana. United Farm Family Life Insurance received the same rating, reflecting the company’s consistent statutory net operating gains and premium growth [and] historically high penetration of life sales to property and casualty lines clients.

Vertafore Solutions

- ImageRight

Proven Results

- Ensured faster, better turnaround for agents and CSRs
- Achieved objectives for disaster recovery and business continuity
- Improved processes and eliminated bottlenecks
- Made one-week transition from paper to paperless
- Transferred training from ImageRight to internal training staff
- Automated commercial-lines agency forms

Embracing change and managing technology to improve business processes and achieve better outcomes.

Indiana Farm Bureau Insurance was founded in Indianapolis in 1934. Its member companies—United Farm Family Mutual Insurance Company, UFB Casualty Insurance Company, and United Farm Family Life Insurance Company—provide auto, life, home, business, and farm coverage with the help of more than 450 agents and 1,200 employees. Over its history, its commitment has remained the same: provide sound products and superior service. That same commitment led them to ImageRight. Our Roving Reporter talked with Ken Emerson, Manager, Mutual Systems—and Sudhanshu “Sid” Sinha, Manager, E-Business Applications—to find out how and why.

RR: Ken, how did your position influence your role in the selection and implementation of ImageRight?

Ken: My role in the organization focuses on the new technologies and their involvement with the business units. I make sure our business units are in operational synch with our technical people. It’s really my job to adopt an overall operational perspective, to assess and fulfill needs, to work with Sid to look for new technology with an eye toward process improvement, and to find ways to do things better, faster, and more easily.

RR: So, you and Ken work pretty closely, Sid?

Sid: We have to. It’s my responsibility to drive, plan, and deploy enterprise technology applications. That’s a big job in a company as large and diversified as Indiana Farm Bureau Insurance. Ken and I rely on each other for complementary perspectives. He’s going to make sure our business users are well-served, while I make sure our infrastructure and our IT budgets are well-served.

ImageRight: One day, Indiana Farm Bureau wakes up and says, “Hey! We need a content-management system!” What was that like? And what led you to undertake the search that led you to ImageRight?

Ken: In a word: risk. If we have a fire, we’d be in a world of hurt with paper files. Our first thoughts were about disaster recovery and business continuity.

Sid: Those two things, plus streamlining processes. We sell products, but we provide service. So, we wanted to ensure faster, better turnaround for our agents, CSRs and ultimately our customers. We went through the process of establishing a business case. We interviewed a number of vendors. And we considered doing pilots with two of them. Then we started speaking to some ImageRight customers. After we heard about their performance and their reputation, our choice became clear.

Ken: Their focus on insurance puts them in a singular niche. After speaking with other vendors, we realized how much easier working with ImageRight would

“Now we’re using digital files and electronic workflow. People have depended on paper forever, and we’ve literally taken it out of their hands. And they’re loving it.”

— Ken Emerson, Manager, Mutual Systems

be because we didn’t have to explain insurance concepts and terminology. Insurance is their business, too.

RR: Was workflow a component you thought about before your search?

Sid: Yes, it was very much a part of what we were looking for. Working with digital files, archive, search and retrieval, and the other benefits of a content-management system certainly were important to us. But workflow was at least as important because we recognized that it was the component of the system by which we would achieve process efficiency and productivity improvements.

RR: What do you think surprised you most during your search?

Sid: I think it was the fit. There are some big powerhouse vendors out there selling content-management systems. They have big names and big capabilities. While ImageRight has those same capabilities, the system isn’t overly complex. And while it’s capable of scaling with our growth, it’s simple to deploy and maintain. In those ways, it was everything we needed—technologically sound, user-friendly, and insurance-focused.

RR: What surprised you most during implementation?

Ken: The fact that, if there’s a problem, ImageRight takes the initiative to resolve it—even if it’s not their’s.

RR: Do you have an example?

Ken: One of the pieces of hardware required for our initial installation was delivered incorrectly. Alex Grieco, who managed our implementation, got online, reordered the piece, and had it delivered overnight. When it arrived, it turned out to be the wrong piece again. So, Alex got in his car at

lunchtime, found the right piece here in Indianapolis, bought it, installed it, kept us moving, and didn’t even charge us back for the part.

RR: What, if anything, surprised you after you went live?

Ken: The smoothness. The first few weeks after introducing any new technology or process typically are a bit chaotic. But we didn’t have that.

Sid: Within a week, our users were completely in tune. Introducing the new system was a legitimate paradigm shift. But ImageRight minimized the disruption and disorientation. And while every vendor talks about “knowledge transfer”, ImageRight ensures it. We used some of our own corporate trainers for the second phase of our roll-out. In the third phase we’ll use our own trainers exclusively.

Ken: Tammy Wolfe, one of our corporate trainers, told me, “This is the best system implementation I’ve ever been involved in during my career with IFB.” And Dan Poledna, Underwriting Manager, who was only with us for about 18 months when we did the initial implementation, said: “This is the best implementation I’ve been involved with anywhere.” That’s high praise in any context. For us, it was affirmation of our decision to go with ImageRight.

RR: You alluded to the smoothness of the roll-outs earlier. But what, specifically, has the ImageRight experience been like for your users?

Ken: We’re talking about change—and we’re talking about software. Implementations don’t go well. Systems don’t run well. Training doesn’t go well. People resist change. We had none of that. As soon as we started Training Week, we got a phone call from the Claims manager. His staff was so

excited, he asked me, “Can we do this sooner?”

Sid: The same thing happened when we rolled out Commercial Underwriting. The business users were saying, “Wow. Let’s use this thing!”

Ken: What’s amazing to me is that, in 1994, we still had dumb terminals here. In 1995, we started rolling out PCs. It was major culture shock. People simply didn’t want to change. Now we’re using digital files and electronic workflow. People have depended on paper forever, and we’ve literally taken it out of their hands. And they’re loving it.

RR: What’s next? Do you see any potential for using ImageRight that you hadn’t intended or anticipated when you bought it?

Sid: It depends who you ask and how far ahead they’re looking. There’s certainly much more potential for end-to-end electronic processing that we can exploit in the future.

RR: Do you have an example?

Sid: In phase two of our roll-out—we were almost done—the underwriting team leader started asking about automating agency forms. That’s an indication of understanding the potential of the technology to change the ways in which we’ve been doing business and to initiate that change from within the business-user community. The more we come to learn about ImageRight, the better we understand the breadth of its capabilities, and the more we invest our imaginations in using it, the more we’ll realize its potential.

Ken: In many ways, we were behind in this kind of technology. But ImageRight was embraced by everyone. And for as much as we’ve accomplished already, we feel like we’ve glimpsed only the tip of a very valuable iceberg.



11724 NE 195th Street
Bothell, Washington 98011

800.444.4813
vertafore.com

Vertafore is the leading provider of software and information to the insurance distribution channel, including independent agents, brokers, MGAs, carriers and reinsurers. Vertafore leverages a unique industry presence to deliver meaningful solutions—powerful technology, critical information and robust insights to help organizations effectively respond to business challenges and capture new opportunities. Vertafore solutions are helping more than 17,000 customers and 500,000 end users gain a competitive advantage to accelerate their business performance.

© 2011 Vertafore, Inc. All rights reserved. Trademarks contained herein are owned by Vertafore, Inc. The names of actual companies and products mentioned herein may be the trademarks of their respective owners. VAM.SS.???0511