



OMSNIC

Company snapshot

OMSNIC began more than 25 years ago, when a group of oral and maxillofacial surgeons (OMS) came together to create a firm that specialized in professional liability insurance for doctors in their profession. Today, OMSNIC insures 83% of the U.S. OMS market. In 1997, OMSNIC founded Fortress Insurance, which provides professional liability insurance for general dentists and dental specialties.

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Peggy Klein,
Vice President of Information Technology,
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Vertafore® Solutions: ImageRight®

Migration Success Factors:

- Planned a year in advance
- Verified back-end software and hardware matched ImageRight hardware requirements
- Identified which workflows to migrate as-is, and which to change
- Performed end-to-end testing
- Allowed adequate time for small group training
- Engaged Vertafore resources for migration planning, implementation, training and go-live

OMSNIC migrates to latest version of ImageRight with surgical precision.

OMSNIC was founded by a group of oral and medical surgeons to fill a market void: namely, providing professional liability insurance exclusively for this specialty group. Today, OMSNIC insures 83% of the OMS market nationwide.

While its deep industry knowledge plays a big role in this company's success, OMSNIC is also a model in operational efficiency. That's why its leadership purchased Vertafore's ImageRight solution.

"Prior to ImageRight, we had bar code printers on everyone's desk, and maybe a scanner. There was a lot of paper shuffling, and some cumbersome processes," explained Peggy Klein, Vice President of Information Technology for OMSNIC. "ImageRight has been a huge success here. No one will touch the content management function in our core system anymore."

Klein was an ImageRight fan long before she joined OMSNIC.

"I implemented ImageRight in my previous company, and it was the smoothest migration I've seen in my 42 years in IT. The people are fabulous, including our Account Manager," Klein said. "And the product itself is so reliable—you just plug it in and go. ImageRight never has a lot of issues. When a new release comes out, it works. I can't say that about a lot of the other solutions."

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Planning the migration

When the time came to upgrade to the latest version of ImageRight, Klein wanted to make sure everything went as smoothly as possible. So, she and her team started planning for the change a full 18 months out.

"Our first step was to train Laura Sterczynski, our Network Administrator for ImageRight, on what had to happen before we could make the change," Klein said. "Vertafore provides a very detailed checklist of what you need to do to get ready. You have to look at all the software and ancillary hardware. You have to be on the latest version of SQL and Windows. We were fortunate in that we didn't have to do any software or scanner upgrades, but we definitely checked against what Vertafore provided early on."

Sterczynski then reviewed all workflows to identify what would migrate over without change; and which workflows required alterations. With so many departments using ImageRight, this was a critical job.

"We use ImageRight in our Policy, Policy Billing, Claims, Finance, Marketing, and IT departments. Our policy and claims people are our power users and the most progressive. The other areas use ImageRight primarily for record retention,

without a fully automated workflow in place, although we'd like to see that change in the future," Klein said.

Klein also contracted with a Vertafore ImageRight Migration consultant to assist in the migration planning and implementation.

"I highly recommend engaging Vertafore resources to help with the migration. It is a big deal. And, it makes no sense to do it all yourself," Klein said. "At the very least, let Vertafore help you plan the migration. That extra expertise makes all the difference."

Determining an approach

Typically, a migration of this type would involve upgrading individual computers. But, OMSNIC wanted to take a different approach.

"Instead of individual computer upgrades, we wanted to do a scripted upgrade, so everything would happen automatically," Sterczynski explained. "With a scripted upgrade, when employees use the login script to sign on, it triggers the installation of ImageRight on the desktop, as well as several other add-ons like the ImageRight printer, Outlook, and Microsoft Office. After we verified with our Vertafore expert that the scripts approach was possible, we knew that was the way we wanted to go."

"I highly recommend engaging Vertafore resources to help with the migration. "

End-to-end testing

According to Klein and Sterczynski, one of the most critical steps of the migration process is testing, although for most companies, this is also the most difficult phase.

"We kept the old version and new version of ImageRight on our staff's computers, and created test environments. Then we pulled in key people from each department to test," Klein said. "I'm not going to lie, getting people to test is sometimes like pulling teeth, but it is crucial. Because there were only minor changes in the user interface, we heard a lot of, 'We don't need to test; it looks exactly the same.' But it's not exactly the same. You can't gloss over the testing part."

Testing pieces and parts of the software is just not enough. "You have to test the end-to-end process from scanning through the workflow to the desktop to see if the workflow has to change," Klein said. "In a migration, the surest way to fail is to make assumptions. Testing helps you catch the errors before they impact your business."

"It's important that people have the opportunity to see what the new version does better, so they quickly get on board."

Peggy Klein,
Vice President of Information Technology,
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Preparing your users for change

Finally, migrating companies have to prepare their users for change.

"Strong, and focused training is very important, not only to make sure people know how to use their updated tools, but also to aid in change management. Initially, we did have some resistance to change because, 'They messed with our beloved ImageRight,'" Klein said. "It's important that people have the opportunity to see what the new version does better, so they quickly get on board."

OMSNIC did several sessions of large group training, something in retrospect, Klein would change.

"Honestly, I would have changed the way we handled training. First of all, I would allocate more time, so our staff could better assimilate the changes—and let go of wanting to do certain functions the way they've always done them," Klein said. "Our groups were too large, and we mixed users. That was a problem, because underwriters ask different types of questions than someone in claims."

So, what would she do differently?

"I would make training more dynamic, training six people a time at the most—all from the same functional area," Klein said. "I'd have one trainer and one assistant who could go around the room and help people individually; and I'd make the training two to three, uninterrupted hours."

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Peggy Klein, Vice President of Information Technology, OMSNIC

Go-live weekend

Clearly, the OMSNIC team put a lot of effort into the ImageRight Migration.

Did it pay off?

"We chose to do the 'weekend' migration, where our staff leaves end-of-day on Friday and logs in to new system on Monday," Sterczynski said. "Any time you migrate from one version of major software to another, you expect something to happen. But, nothing happened. Everything went smoothly because of Vertafore, and because of the work we did upfront."

Although resistant to change at first, the entire OMSNIC staff is now a fan of the latest version of ImageRight, and the benefits it brings over the older version. The new functionality saves time, and makes life a little easier in the process.

When you do have questions

There's a process to submit support questions, backed by an entire team of ImageRight experts. "When I submit a ticket, I get documentation on the issue and how that issue was resolved,"

Sterczynski said. "When you only have a problem once every seven months—which is the case with ImageRight—it's nice to have something to go back and refer to."

With careful planning and engaging the right Vertafore resources, OMSNIC conducted a flawless migration, and continues to reap the benefits.

"ImageRight is one of the most reliable software solutions we own, and one of the most valuable," Klein said. "We get great service from Vertafore, and have an account manager who never lets us down. I don't think you can ask for any more than that from a technology partner—and Vertafore keeps delivering."

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