



Vertafore™

Unleash your potential

Success Story

Bowen, Miclette & Britt

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Bowen, Miclette & Britt increases efficiency and gains visibility into its operation with Vertafore® WorkSmart.

Bowen, Miclette & Britt (BM&B) didn't grow into a \$47 million agency by taking things slow. This leading, Houston-based agency stays at the forefront of technology to keep both its efficiency and service levels high. It's a commitment that starts at the CEO level and permeates throughout the organization.

"We have always been early adopters, because we've seen the impact technology can make on our business," explained Donna Wilson, senior vice president of BM&B. "We implemented our first document management system back in 2000, when only two options were on the market. We've been continually using technology to drive our efficiency."

Wilson and the agency's business systems specialist manager Julie Granhold continually research the market to see what's new. After attending a demonstration of Vertafore's WorkSmart last year, they saw the potential.

"Our Vertafore representative asked if he and a consultant could come in with a new workflow and show how this—and WorkSmart—could improve our efficiency," Wilson said. "We're a really well-run company, but that experience was an eye-opener. New workflows and WorkSmart could reduce at least 25 percent of the steps it took to complete our transactions."

In just a short time, WorkSmart has already lived up to its promise.

Visibility is Power

One of the biggest gains was visibility—giving management and staff the ability to know exactly what's going on in the operation at any given moment.

"For example, within a month of implementing the business process reporting in WorkSmart we were able to see exactly how many pieces of mail we process in a month, how long it took on average to route each piece (two minutes once it was scanned in), how many policies we processed in a month (937) and how long it took to process each one (nine minutes)," said Wilson.

"We know everything that's going on, every day—from the number of policy corrections to the efficiency of our account manager servicers. We can also see which clients are costing us the most money. We have real facts to support our business decisions," said Granhold.

In a glance, agency managers can get a real-time view of current workloads and how long tasks are taking to complete, so they can load balance, if necessary. "Just last month we had a situation where I noticed there was a backlog of 88 certificates that needed processing. It turned out that two of our employees who normally process certificates were out of the office. So I was able to quickly reassign the work to others and we knocked it out in no time," said Granhold.



Jonathan Wood, Julie Granhold, Jackie Allen, Hilda Lopez and Donna Wilson

Agency Snapshot

Bowen, Miclette & Britt (BM&B) is a \$47 million, independent, privately-held insurance brokerage and risk management consulting firm. Headquartered in Houston, Texas, with offices in New Orleans, Florida and Arkansas, BM&B is the 64th largest commercial retail insurance broker in the United States. One big differentiator is the way this firm uses technology to provide superior, efficient customer service.

Vertafore Solutions

- Sagitta®
- WorkSmart™
- BenefitPoint®

Proven Results

- Reduced the time to complete submissions from three to four days to one half-day.
- Mail is now sorted, matched to client and put in workflow within two minutes.
- A projected 25 percent increase in capacity and a projected 54 percent reduction in steps needed to process routine transactions.

“We have real facts to support our business decisions—you just can’t get this type of information any other way than with WorkSmart.”

— Julie Granhold, business systems specialist manager, Bowen, Miclette & Britt

Newfound Efficiency—From the Mailroom On

WorkSmart’s intelligent workflow is designed to increase capacity by decreasing the number of steps it takes to perform tasks, leaving staff available to do more high-value work. At BM&B, the time savings starts in the mailroom.

In the past, mailroom personnel had to scan and spend time identifying where documents needed to go.

“Now, when our mailroom staff scans the document, it automatically attaches to the customer file and routes to the right person in the workflow. The whole process takes about two minutes,” Wilson said. “Before WorkSmart, the mailroom was never caught up. That’s not a problem now.”

Audits, which need to be handled quickly, often got bogged down in the mailroom, too. With WorkSmart, these time-sensitive documents get to the right people with time to spare.

Streamlined Submissions

Prior to WorkSmart, the renewal process involved printing reams of paper, updating the information on what the client sent back and submitting the printed information to marketing for remarketing.

Now, the producer starts the renewal process. Workflow used to be reliant on employees remembering to send the paperwork through to the various departments. With WorkSmart, as soon as the producer says, “this is a remarket,” the right information goes to the appropriate people simultaneously.

“Submissions that used to take several days now are completed in one half-day, with no paper printed,” said Granhold.

Seamless Integration with Sagitta

WorkSmart’s integration with Sagitta also eliminates steps and provides one cohesive picture of every account.

“In our old system, we had one client code in Sagitta, and we had to manually add it to our document management system—leaving room for error and multiple incorrect client codes. Now, when a new client is set up in Sagitta, that client is automatically set up in WorkSmart, with policy terms and the policies themselves,” said Granhold. “Everything is interlinked.”

Not only does this integration give the staff one place to look for the information they need, but, according to Granhold, it transforms pieces of data into one cohesive account view.

“If you’re adding a truck to an existing account, you open it up and WorkSmart paints the whole picture,” she said. “You see the request, the amended request, account notes—every step through the final endorsement. And you do it all with the click of a button.

This integration, in conjunction with WorkSmart’s email receiver, improves service levels by automatically routing certificate requests to the right person.

“When a request for a certificate comes into the email receiver, the client code is listed in the subject line. WorkSmart goes behind the scenes to Sagitta to gather the necessary documents to complete the task and routes it all to the right assistant service representative for completion,” explained Wilson. “It’s all about providing better service with the same number of people—WorkSmart helps us do both.”

Consistent Processes Drive Continued Success

BM&B recently acquired an agency in Florida, and is counting on WorkSmart to quickly get its employees up to speed on processes and procedures.

“We know our new agency will benefit from the efficiencies in WorkSmart and the reporting features they don’t currently have,” said Wilson. “It will also be easier to implement our procedures in our new location because the workflow is already there.”

That consistency, efficiency and continual process improvement has enabled BM&B to grow from a \$5 million agency in 1993 to the \$47 million success story it is today.

“They truly understand our business. That’s why their solutions make a measurable impact. Just look at what WorkSmart has done for us already.”

“We’re innovators—and Vertafore helps keep us that way,” Wilson said. “Their solutions work because they understand what it takes to get our jobs done in the real world. Their people come on site, they watch how we work—they truly understand our business. That’s why their solutions make a measurable impact. Just look at what WorkSmart has done for us already.”



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