



Vertafore™

Unleash your potential

Success Story

Peel & Holland Financial Group

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Roy Riley, President, Peel & Holland Financial Group

Agency Snapshot

Peel & Holland Financial Group opened its doors in 1924 to deliver quality insurance solutions and superior customer service to its clients. Today, with four locations throughout Kentucky, this thriving, full-service agency provides everything from family insurance to commercial risk management and benefits solutions, as well as programs specifically designed for municipalities, counties and their political subdivisions and agencies.

Vertafore Solutions

- WorkSmart™
- Sagitta
- BenefitPoint
- TransactNOW

Benefits

- Effective workload management
- Consistent processes
- Complete workflow visibility
- WorkSmart integration with Sagitta and BenefitPoint

Proven Results

- Improved customer service
- Increased employee morale
- Increased efficiency, which will grow the agency's revenue per employee

Peel & Holland drives efficiencies and ultimately, increased revenue per employee, with WorkSmart.

Peel & Holland Financial Group is a successful agency that takes pride in doing things better: Providing more responsive customer service, finding the best coverage at the fairest price and consistently delivering beyond expectation. But, thriving in a competitive market takes more than increasing revenue. That's why Peel & Holland President Roy Riley keeps equal watch on the bottom line.

"We have a five-year vision to grow our agency by about 40 percent, and one key component to achieving that goal is increasing our revenue per employee," he said. "That's the greatest indicator of an agency's financial health."

The agency was doing a lot of things right. It was a member of Siktins International, its management team was one of the first to embrace download, and its operation ran efficiently. However, the lack of an automated workflow began slowing the agency down.

"We had a solid document management system in place for eight-plus years, but it wasn't integrated with our systems. That left us with a lot of manual processes," explained Deann Moore, Director of Finance, IT and Human Resources for Peel & Holland. "Although we could have developed workflows within that system, it would have been a huge investment in time and money. It made more sense to look for a replacement with an automated workflow."

Moore and her staff had researched many different options, but were undecided. The turning point came at the NetVU (Vertafore Users Group) conference in Nashville. "Jessica Jeffress, our new account manager, attended some WorkSmart events, saw the demonstrations and said, 'this is what we need to do.'" Moore said. "We went to talk to Roy (Riley) right then."

Although a workflow solution wasn't in the budget for that year, after a closer look at WorkSmart, Riley decided to put some scheduled expenditures on the backburner to make the investment.

"We saw the vision of how WorkSmart would help us "connect the dots" and drive our efficiencies in a significant way," Riley said. "Because WorkSmart would integrate with Sagitta and BenefitPoint, we knew it could help us pull all of our processes together in one cohesive, automated workflow with a visibility that we'd never had before."

Effective Workload Management

Peel & Holland had transitioned from a one-to-one processing operation to a service team model, where the workloads were dynamically balanced. But, it was WorkSmart that made the concept come to life.

"Instead of having our four support personnel tied to specific producers or lines of business, we created a processing pool that supports everyone. However, it was hard to manage this team approach manually, because we couldn't see what tasks were in the queue without doing physical desk audits," Moore explained. "With WorkSmart, we have complete visibility so we can monitor and redistribute tasks. We also have multiple ways to get work into the system—it can be printed, emailed or scanned in. Either way, it kicks off the workflow in the queue."

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— Roy Riley, President, Peel & Holland Financial Group

Every member of the support team also has visibility as the work moves through that organization. This capability has brought an unexpected benefit: A sense of pride.

“Our team can now see what they’ve accomplished in tangible terms, which has had a positive impact on their morale,” said Jessica Jeffress, Account Manager and Business Development & Systems Specialist for Peel & Holland. “WorkSmart has also driven consistency in our processes, which has increased their confidence as well.”

Efficiency Through Integration

Before the integrated WorkSmart solution, Peel & Holland’s staff couldn’t look up a single client and get all of that client’s information at once. So, they had to manually key the indexes in, adding time to the process.

“Today the game for all businesses is about leverage—greater results with less effort—and productivity—greater results in less time. Vertafore’s WorkSmart creates the platform for agencies to leverage the right resources for the right tasks, and consistently exceed client expectations.”

—Steve Loundsberry, Vice President, Sitkins International

If users needed a client or claim document, they’d have to run a query and literally page through sometimes hundreds of documents to get to what they needed. Now, because WorkSmart combines true document management with workflows, and integrates those workflows with Sagitta, everything happens with one click.

“Today, if someone’s working in Sagitta in a client, she can press a button and see all the documents that relate to that client. If she’s in claims, she can click a button and see all of the documents related to that claim,” Moore said.

WorkSmart also gives users the ability to page through and mark documents at critical points, like the beginning of forms. This capability is particularly beneficial to Peel & Holland’s satellite office staff, who used to have to wait for all of the pages in a lengthy document to download before they could get to what they needed.

Razor-Sharp Customer Service

In the past, producers might have client files stored in multiple places, which made it near-impossible for their account managers to find what they needed quickly.

“With the proliferation of email, there was a lot of communication between our producers and customers that went on without anyone knowing,” Riley said. “This made it hard for our team to service these accounts.”

With WorkSmart, all of that has changed. With all client and prospect folders stored in one place, accessible to the entire service team. Not only does this reduce E&O, but also enables Peel & Holland to take its already outstanding customer service to the next level.

“We can now send client documents digitally, instead of sending a fax. So, if a client calls in to check on a certificate, we can quickly look and not only confirm that the certificate was sent, but that it was sent at 1:40 p.m. and is there now,” Jeffress said. “With a fax, only the person who sent the fax knows if and when it went out.”

But, the impact on client service extends well beyond incoming calls. “WorkSmart improves the client experience because we have the right people working on the right task at the right time,” Moore said.

“We can pull all of our resources on one large commercial account renewal if we need to and respond more quickly to changing demands. All of that has a positive impact on our service.”

Accelerating Success

Beyond its capabilities, one of the biggest benefits of WorkSmart is the company behind it.

“Bringing in a company that knows the insurance industry is huge. Vertafore not only is an insurance expert, but they have a super-strong implementation team. I have a lot of experience with project management, and I’ve never seen a better job done,” Moore said. “You just don’t get that level of support with other suppliers.”

To Roy Riley, Vertafore’s insurance industry focus enables the agency to see the benefits derived from new technology much faster.

“Having Vertafore as a provider is an ‘accelerator,’” Riley said. “We would have to bring other providers along and educate them on the insurance industry before we could really get the kind of workflow we needed. Vertafore knows the insurance industry and how it works. They bring us templates to tweak, instead of starting from scratch. They accelerate our return on investment.”

Although it’s still too early to chart actual efficiency metrics, Riley is confident the agency’s investment in WorkSmart will pay off in a significant way.

“Ten years ago, our revenue per employee was \$86,000. Today it is \$160,000—nearly double. That’s due to our smart investment and use of integration, automation and technology,” Riley said. “We’re confident that the efficiencies we’ll gain with WorkSmart will help us reach our goal of \$180,000—and eventually, our push goal of \$200,000. For us, the investment of time and money was a good decision. We can become more efficient, more profitable and deliver a better customer experience.”



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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.

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