

## Allied North America

### Microsoft Technology Improves Customer Relations for Major Insurance Firm

Posted: 02/29/2008

<http://www.microsoft.com/casestudies/casestudy.aspx?casestudyid=400001512>

#### Business Need

The complexities typically found in the relationship between contractors, subcontractors and carriers in the insurance industry make communication challenging. Allied North America realized it could gain an advantage in the marketplace by shifting from its spreadsheet-based methodologies to an integrated system providing its customers easy access to information and tools.

Allied traditionally used electronic spreadsheets and paper to manage its interaction with clients, handling tracking of open items and its annual stewardship reports, in which it presented its accomplishments in the previous year and its goals for the year to follow. Compiling multiple spreadsheets and re-entering data to consolidate the information made tracking items extremely difficult. Management constantly needed to locate everyone associated with the process to ensure that their tasks had been completed on time and then enter the same base information numerous times in its spreadsheets.

As a typical example, at the end of a policy term, a carrier's audit of a single policy could take three months to complete, with Allied managing the process through spreadsheets provided to the carrier.

Allied believed it could significantly improve its existing process, enhancing productivity and profitability, if it could employ technology to improve the visibility of the policy processes and dramatically restructure the way it interacts with carriers and clients.

#### Solution

Working with Microsoft Gold Certified Partner Impact Management, of Hicksville, N.Y., Allied Chief information Officer Ira Schwartz and his team developed a plan for implementing Microsoft Office SharePoint Server (MOSS) as a platform with CorasWorks Workplace Suite to create a Web portal with applications accessible to employees, customers and insurance carriers.

#### Solution Overview



<http://www.alliedna.com>

**Customer Size:** 450 employees

#### Organization Profile

Allied North America is one of the nation's largest construction-driven independent insurance and surety brokerage firms. It is the No. 1 brokerage firm focusing specifically on the construction industries.

#### Partner

IMPACT Management

<http://www.impactmgmt.com/>

#### Vertical Industries

Commercial and Re-Insurance  
Insurance Industry

#### Country/Region

United States

www.impactmgmt.com

Schwartz called the program mySocrates and laid out a vision that he felt would position Allied "as an innovator and leader within the insurance industry by creating a technological advantage over its direct competitors within the construction segment of the business." mySocrates would provide increased visibility into processes and information, while making the internal methodology transparent, streamlined and automated.



“

Our Microsoft SharePoint portal enables us to show our commitment to delivering quality and convenience to clients [and allows us] to demonstrate our importance to the business.

**Ira Schwartz**  
Chief Information  
Officer  
Allied North America

The program was designed to incorporate enhanced applications into the portal, including those for claims management; certificate issuance and tracking; first notice of claim; bonding; project management; open-items management; stewardship program; and WrapStar, Allied's new wrap-up application. All these processes would become visible to the customer and available on demand anytime. Additionally, with MOSS's Single Sign On technology, clients need only to remember a single password for the system.

Accompanying this extranet portal would be an intranet that would provide all the departmental applications and sites, other internal applications, company news, enterprise search, business reporting and a single location for information relating to stewardship reports. Integration with the company's document management repository will be available soon.

”

#### **Benefits**

Allied used SharePoint to improve collaboration with its clients by creating an open-items list, allowing users to customize views of any outstanding issues or items that required resolution. Premium audits have become simplified and information for stewardship reports is available on demand. Staff contact data and information on policy and claims now are visible.

- Allied can turn around the audit request by a carrier in two to three weeks instead of the previous two to three months.
- Clients receive an earlier return on any overpaid premiums, a significant competitive advantage for Allied.
- Open items roll up to the team, division head and president to ensure action.
- Instead of searching through paper, e-mails and notes to assemble stewardship reports, Allied now has all the information needed for these reports available at any time through the mySocrates portal.
- The open-items list now is integrated automatically into stewardship reports.
- Staff who perform fee-based services, such as the safety division, now use Microsoft electronic forms, information from which is transferred automatically into the division report and the stewardship report. Clients can see up-to-date information on time and dollars expended.
- Allied has integrated its agency management using Web services. SharePoint users can see contact information on clients and staff, as well as policy and claims information. This data, previously entered in multiple locations, now is entered just once and is accessed with a single sign-on system.

The impact of the Microsoft SharePoint portal was summarized by Allied agent Jim Boone, in the company's St. Louis office: "It's a great opportunity to be diligent. We are writing a story for our clients by utilizing this tool, and they can see the trends on how we, as a company, provide service—a terrific selling point at renewal."