



At a glance

Organisation

Insurance Advisernet Australia

Industry

Financial Services

Location

Head Office, Sydney

Solution

Microsoft Dynamics CRM Online,
Microsoft SharePoint, Office 365

Business Objective

With growing membership numbers, IAA needed to improve the access and dissemination of business critical information to their Authorised Representatives and improve the management of these relationships through streamlined processes.

Business Benefits

- Secure access for Authorised Representatives to dashboards, data and reporting tools
- Improved integration between line of business applications, including Microsoft Dynamics CRM Online, SharePoint and Microsoft Dynamics GP Online
- Increased visibility of communication between representatives and IAA staff through social integration
- Internal capability of business users' to manage and grow their solution
- Improved intuitive usability for internal and external users

Leading insurance firm leverages cloud to transform information management

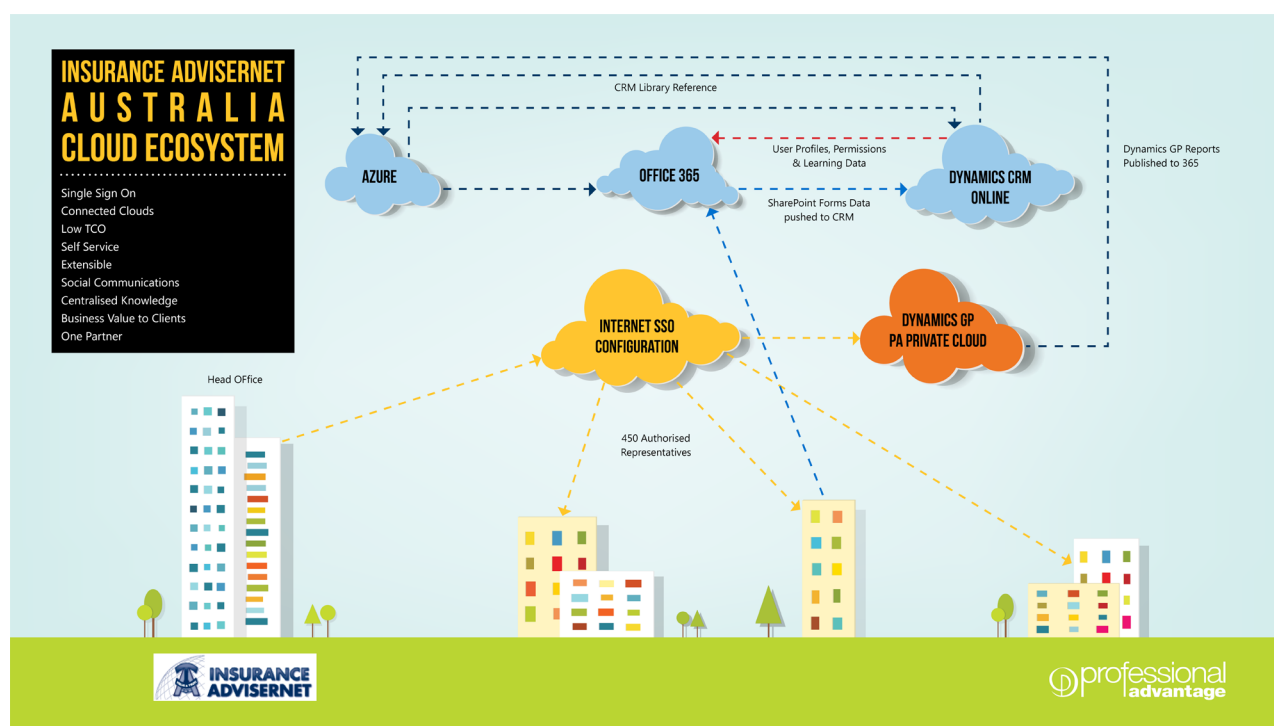
Insurance Advisernet Australia (IAA), one of Australia's largest insurance brokerages, supports a network of 140-plus authorised representatives employing 400 advisers across Australia. IAA enables its members to take advantage of the benefits that come from running their own business while at the same time gaining access to the insurance products, services and support of a much larger, national group.

Information systems are key

In 2013, the company identified two emerging information management needs, both driven by the network's growing number of members. Steve Dymond, General Manager, Business & Information Systems explains, "At the time I arrived at IAA, many of our systems were outdated and our processes were clunky. We needed to harmonise it all somehow. We wanted to have one vision, so that we were all on one system with easy access to information."

A key challenge was the outward dissemination of information. The company needed to make information such as training and product resources easily available to all authorised reps.





Although the organisation already had an extranet that contained the necessary information, it was fragmented, hard to update and manage, and difficult to search. Dymond was determined to improve the situation by providing a more user-friendly extranet experience, one that offered a single sign-on to all systems.

The second issue was the management of authorised representative relationships. "It was a question of how our business processes are mapped out so we manage relationships efficiently," Dymond notes.

Managing member relationships

Management decided to address internal processes first, before moving on to the question of customer communication. "We made the decision that if we were trying to harmonise all our systems, it made sense to base as many of our systems on Microsoft as possible and therefore to use Microsoft CRM," Dymond observes. To deploy the software, IAA selected Microsoft partner, Professional Advantage.

Dymond believes Professional Advantage provided invaluable guidance throughout the implementation. "Especially in terms of user adoption. Their input led to some minor tweaks that helped improve the project," he notes.

Rather than overwhelm staff with one big change, three phases of the new CRM system were released during the final months of 2014. "Each time we added a little more functionality," Dymond notes. "As well as giving us a 360

degree view of our authorised reps, we've taken specific processes such as quarterly activities, the annual audit, and certain types of record that have to be noted and followed up on almost a daily basis and pulled them into the CRM."

The result is a huge improvement over the disparate systems, spreadsheets and notes that used to record member interactions.

"We've increased visibility into communications between reps and IAA staff by putting information where our people can see it."

Getting information to the reps

With CRM development under control, Dymond turned his attention to the second part of the equation: efficient provision of information to authorised representatives.

"Because of the existing extranet, we knew that our clients liked having a central place to go to for the information they needed, but it wasn't a particularly friendly site and its search functionality wasn't great. We also realised our communications weren't perhaps being read by as many people as we would have liked, so we didn't just want to replace the extranet. We wanted to enhance the way we communicated with members, to make it easier for people to get information," Dymond says.

An integration challenge

Ideally, what IAA wanted was a single sign-on source for all authorised representative information including library resources such as policy wordings, broking tools, training materials and company news. Dymond says, "Our vision was for a platform that we could build on and expand quite heavily over time. We wanted the authorised reps to come into their office in the morning, log in to the site, check out our news stream and see what's new. They'll use the dashboard environment to check their debtors, get income statements and access benchmarking and business intelligence data."

In July 2014, with the help of Professional Advantage, the new extranet was designed. Leveraging Microsoft's Azure cloud computing platform and the SharePoint web application framework, it included integration with three clouds – IAA's Professional Advantage's hosted Microsoft Dynamics GP, Office 365 and CRM Online. With careful planning and guidance from Professional Advantage, the end result not only promised a simple to use, secure portal, it would also personalise financial and business information for IAA's most important assets – their Authorised Representatives.

"Given the nature of the information, security was always going to be a big deal," Dymond points out. "We spent a lot of time in each application, right from the very beginning, mapping out how permissions would work."

Member response

Named "MyHQ", IAA's new site offers members updated information as well as a wider range of content. A focus on user needs has paid off with a much-improved, more intuitive browsing experience and searching has become far easier.

Thanks to new work flows, IAA has been able to decentralise content responsibility, so that different IAA departments can prepare and manage their own data, supported by tools that ensure information remains relevant and up to date. What's more, the simplicity of system has resulted in staff creating more than 20 new forms within just a few months.

Integration with the CRM system is delivering the personalised training reports that reps require and in time, this will be extended by the addition of an education centre offering online training and additional targeted information.

Although only in its early days, members are already checking MyHQ daily, with some acknowledging they keep the site open on their desk and refer to it throughout the day. Members regularly access policy documents, benchmark reports, income and margin documents and insurer information.



Due to the Yammer integration, the extranet now enables members to stay up to date with critical news, updates and questions from around the network, all in one place. Social interactions have increased and the extranet now forms part of the knowledge management and retention strategy at IAA.

A competitive advantage

Universally, members have praised the speed and ease of access to data, with many noting that over time, this will reduce the time required to complete administrative duties. The fast access is also providing a crucial competitive benefit. It is helping members to better meet – and even exceed – customer expectations.

Dymond is quick to point out that there is much, much more development scheduled for the CRM and SharePoint systems at IAA. As the company grows, so will the system.

"It will be an ongoing effort for sure. We're starting to scope out another phase of the CRM which will see us move our help desk system into the CRM. And in SharePoint, we have a few things on the boil for 2015, including a reporting environment and the new education centre. As long as everyone is benefiting, I don't see an end to any of this yet," Dymond smiles.



Enabling *High Performance* Workplaces

About Professional Advantage

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Contact us



1800 126 499



www.pa.com.au



enquiries@pa.com.au

