

Customer Case Study

Buckeye Insurance Group

Diamond 5x Upgrade Experiences

Upgrading with Insuresoft

CUSTOMER: Buckeye Insurance Group

Imagine a world that had no upgrades. We'd all be driving the original black cars that Henry Ford first made. We'd be limited to doing only basic addition and subtraction on our calculators. Our cell phones would still be bolted next to the gear shift in our cars and our Atari 2600 video games would be entertaining its 5th generation of kids.

Upgrades are a good thing for everyone involved. They are the result of finding better, more efficient ways of doing things and are usually based on past user experiences and improved technologies. While the old adage of 'If it ain't broke, don't fix it' might work in certain instances, it rarely applies to a carrier's technology. Efficiencies and competitive reasons aside, once you've made the leap into technology, the reasons for upgrading to the latest version become even more compelling once you've seen the benefits in action.

Several of Insuresoft's customers recently upgraded their Diamond System, Insuresoft's award-winning policy administration system, to the latest version: Diamond 5x. Since upgrades are part of Insuresoft's maintenance and support agreements, Insuresoft customers can take advantage of all of the benefits of upgrading their system without incurring the typical financial costs charged by other companies. These customers shared their experiences in a panel discussion during Insuresoft's 10th Annual User Group meeting in Grapevine, Texas. Some of their comments have been included below.

R. Christopher Haines faced the upgrade question back in 2009. As an 11-year customer of Insuresoft, Buckeye evaluated upgrading their Diamond System from version 4x to version 5x which is a web-enabled, real-time, .NET based policy administration system. The upgrade to 5x would provide Buckeye with the ability to leverage a modern technology platform that utilized SOA and XML. The upgrade would also provide Buckeye with the ability to consolidate several of their systems. In addition to these benefits, Buckeye chose to implement Insuresoft's agency web portal which provides their agents with a real-time and intuitive web presence.

Haines had concerns about fixing something that wasn't broken. In fact, changing anything related to Diamond was the farthest thing from his mind. "We had been using Diamond for a few years and experienced exponential growth in our business," stated Haines, "We were running on all technology cylinders and did not see a need to upgrade just for the sake of upgrading. But the features and enhancements in Diamond 5x like

being able to open multiple policies made the decision to upgrade a pretty easy one."

Haines and Buckeye completed the upgrade over the course of a couple of weekends. One of the biggest challenges for Buckeye during the upgrade was the data upgrade from Diamond 4x to Diamond 5x. The upgrade included a 16-hour automated process the weekend of the upgrade for policy and claims data. Buckeye also chose to move to Insuresoft's Diamond Publisher product from their previous print vendor during the 5x upgrade, which included converting over 7 million print jobs. The weekend database upgrade required a good bit of planning and testing with Insuresoft's technical staff. Testing of the 5x system required help from all sides, however. "As a smaller company, we had employees from several different departments assisting our testing team in the weeks leading up to the upgrade weekend." Haines stated, "You can test forever but at some point, you have to believe in the system and just make the decision to go."

Neel Choate, Director of Communications at Agricultural Workers Mutual Auto Insurance Company, also went through a Diamond 5x upgrade recently and made a quick observation to anyone considering making an upgrade. "Upgrading to Diamond 5x gave us things like a web portal front end and provided us with system flexibility that will position us for expansion into other states," Choate stated. Recognizing the benefits of upgrading is fairly apparent to the IT department and senior management yet getting your users to embrace the upgrade can be challenging at first glance.

Seeing the Light

Finding a way to gain your users' buy-in is key to a successful upgrade. If you are upgrading from a proven solution which your users/agents are comfortable with, special attention needs to be given to finding ways to make it as easy on users as possible.

"We did everything from make a short video, to offering web tutorials, as well as having review meetings about the upgraded system to try to help prepare our agency users," stated Chris Haines, "We anticipated having a few problems and complaints from our agents because they were on a system in which they were comfortable." Haines and his team were prepared for most of the questions or concerns which arose during the upgrade thanks in part to their account team at Insuresoft.

"The assistance Insuresoft provided us with during our upgrade was invaluable to us," stated Haines, "We were able to lean on Insuresoft every step of the way. They never left us feeling like we were alone during the upgrade." Insuresoft had additional personnel on site and had an entire team based at Insuresoft's home office during Buckeye's upgrade for support. This kind of customer-centric focus is what Insuresoft prides itself on. While offering big company technology, Insuresoft remains small enough to offer customers that personal touch. Teams are assigned to each implementation and upgrade and offer on-site assistance and after hours support to assure successful milestones are reached.

Reaping the Benefits

With the rollout of 5x, Insuresoft customers can now have a web based system that offers added features like premium collections for billing, reinsurance capabilities, a reinstatement with a lapse transaction, premium audit transactions, electronic notification of print events, a rules engine, additional options for user security, and enhanced reporting options. The 5x product also offers additional interface integrations, like the SAQ (solutions at Quote) 3rd party interface, make/model lookup with Redbook, auto data pre-fill, and added Medicare reporting functionality.

"When you take the addition of features like LexisNexis Data Prefill and add in that upgrading to 5x would allow us to stay current with technology trends by moving to a .Net platform," Haines said, "It made the decision to upgrade pretty much a no-brainer."

The common theme that resonated from this panel discussion was that while there was a lot of effort that went into the entire upgrading process, the outcome or end result derived from the benefits received certainly outweighed the efforts of going through the upgrade.

Having an upgrade process in place and including upgrades as part of its maintenance and support agreements like Insuresoft does helps keep the effort-benefit equation tilted toward the benefit direction for customers.



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*R. C hristopher Haines
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Insuresoft provides property and casualty insurance carriers with a proven, best of breed solution that can be configured to meet your unique needs. Insuresoft's Diamond Suite includes components for policy, rating and underwriting, billing, claims, print, agent and policyholder portals, and more.

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