

INDUSTRY: Insurance

THE CHALLENGE:

In 1957, our client founded their insurance firm with the time honored values of integrity, teamwork and protecting those you care about. The founder had passed away in 1989, but two generations later his legacy lives on through his son and agency owner, and his grandson.

Today, the Palos Heights-based firm has sixteen full-time staffers knowledgeable in the areas of personal and business insurance policies. Like his grandfather and father, the Vice President, believes face-to-face meetings are most important, but he also recognizes technology's critical role. "If there is an issue that we can't resolve with a simple reboot," he says, "we need to pull paper files. Productivity with our service team slows dramatically."

His focus on customer service, speed and agency efficiency led him to review his IT strategy and how it affected his business. "Our previous provider was a small firm," he said. "They were reactive, rather than proactive. We would call and have an issue and they fixed it." He says that his agency needed more.

Better use of technology, options and expanded capacity are issues that require careful consideration absent in a reactive environment where an if-it-isn't-broke-then-don't-fix-it philosophy prevails. "When

we started working with 3Points," he says, "it was a modernization of our system starting with our server capacity. We had different boxes and servers before and found that we could utilize technology better with virtualization within one box. Also, the other issue was the backup software and systems. Previously, we had a feed off of the Internet to a backup system. 3Point's Kevin and Dave suggested the Acronis software with much more redundancy."

THE SOLUTION:

The insurance firm switched to 3Points in April 2011. Under the Trusted Partner Package, services like ongoing monitoring, a yearly audit and access to an unlimited help desk changed the way the insurance agency approached technology. "(There is) much more peace of mind when we have downtime. Before, we would come to our previous provider with suggestions, questions or thoughts. Now, 3Points asks 'is this possible?' or 'what do you think about this?' Our computers, services and information are up to date with the most current software and things out there. If there is a problem, it is going to be handled as expediently as possible. At the end of the day, the proactive nature of 3Points is the most important," he said.

THE SOLUTION CONT...

CASE STUDY

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3Points worked with a third party software company well known in the insurance industry in order to create a seamless technology plan for them. This was a critical turning point in building a relationship with 3Points. He says, "We hit it off. That's the biggest thing. We struck up a friendship and comfort level with them. Similar to insurance, changing a provider with computer and IT support is not exactly the easiest thing. They are friendly, responsible and took the time to understand the primary software systems we run inherent to independent agencies. They took a lot of work out of our hands and made sure it would work before they were implemented. Technically, we talk to Michael or someone else on the help desk. For sales, we talk to Dave."

They have refreshed everything from purchasing

16 new desktops to rethinking servers to aligning key applications. As a security-driven company, he considers remote monitoring to be extremely beneficial. And while mobile computing is not on the agenda for everyone, he uses it. "I can go on my iPad and get into my office computer remotely. So, if I go to skating practice tonight with my son, I can continue to work on a project. Between the iPad and a Blackberry, I can always be tied to the office," he said.

He says that technology helps his agency do what they do best: help people in crisis situations. "Things move as soon as a phone call takes place," he states.

CASE STUDY

