Lackawanna Insurance Group Case Study
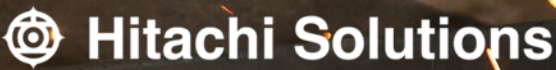
HITACHI
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LACKAWANNA
INSURANCE GROUP

Hitachi Solutions

Dynamics CRM Customer Story

Top Pennsylvania Workers' Comp Specialist Claims Success with Microsoft Dynamics CRM and Hitachi Industry IP

CUSTOMER PROFILE

Founded in 1942, Lackawanna Insurance Group is the premiere workers' compensation specialist in Pennsylvania. Currently the 10th largest writer of workers' compensation in the state, Lackawanna provides its services through a network of independent brokers in Pennsylvania. It provides accident prevention services, such as training on topics that include supervisor safety, housekeeping, slips, trips, falls, basic ergonomics, return-to-work/light duty program, material handling, back care, lifting and safety, machine guarding, defensive driving, kitchen safety, OSHA compliance, and safety committee assistance. The company also offers claims management services, including medical case management and in-house legal counsel, as well as medical cost containment through provider panels, and medical bill review and re-pricing.

INDUSTRY

Insurance

LOCATION

United States

CHALLENGE

Lackawanna's continued growth and success is a direct result of its dedicated staff and network of independent employees. In order to maintain a competitive edge over its competition, Lackawanna relies heavily on its employees' ability to provide superior customer service. The team at Lackawanna is known for being experts in the field, understanding their customers, and serving as knowledgeable resources to both new and existing customers.

As Lackawanna continues to grow, it became increasingly difficult to touch base with all of its clients in order to maintain the excellent customer connections that helped build the business. Prior to Hitachi Solutions and Microsoft Dynamics CRM, Lackawanna was not using a CRM system. Employees would statically look at paper and accounts assigned to them to choose which clients to visit, which resulted in a huge loss of outreach potential due to an inability to dynamically search through all accounts – not just the ones that are assigned to them.

Even simple tasks such as finding contacts on an account, phone numbers, or email addresses proved challenging as people moved through the organization. Without a central CRM location to store client information, it was difficult to recover such information once an employee changed positions or left the company.

SOLUTION

With Microsoft Dynamics CRM, employees are able to search Lackawanna's entire database of clients, whether it's by location, premium level, or account history to pull up the contact record of a client. It is here that the employee will be able to gain a detailed overview of the client, which, in turn, allows the employee to maximize time with the client and provide a heightened level of customer service.

"Dynamics CRM gives us a single pane of glass to look into our various systems," said Paul Pawlowski, IT Analyst at Lackawanna. "As we're

servicing an account, we can see their policy information, claims information, and renewals or new opportunities. Where we previously spent time bouncing back and forth to get all of that information, CRM allows us to see it all in one place."

Streamlining all of the various systems that Lackawanna's employees previously had to sift through to find client information will result in a huge productivity boost organization-wide. Employees are able to see detailed information at a glance, whether in claims, underwriting, or loss prevention.

"What we saw with Dynamics CRM is we can go a lot further with customer information," Pawlowski said. "We can put nonhuman data in – policy or claims information – and have it available to use across our loss prevention, marketing, claims, and underwriting departments. We can see all the source system data in one place, report from it, and use it as a tool."

Having access to such a wealth of information while employees are in the field is an invaluable resource for Lackawanna. Employees can access client information in the cloud from their laptops, tablets, or smart phones no matter where they are. Instead of being bound to a pre-defined list, employees are able to use Microsoft Dynamics CRM to find real-time data on not only the clients they planned to visit, but also adapt to changes in schedules to see other clients that may not have originally been on the radar. This is particularly helpful for loss prevention employees in the field.

"Dynamics CRM has allowed us to truly open up every policy holder to us while we are out on the field – not just those we are responsible for at our premium level," said Janice Nicolosi, Loss Prevention Manager at Lackawanna. "That's key to me because there are some clients that may be in the lower premium thresholds that we never touch pointed, never saw. Now, we have the ability to put a face to the name of Lackawanna."

Nicolosi and her team have seen significant time savings since adopting Microsoft Dynamics CRM. Once a request is made to the loss prevention team, an alert is sent to notify them of the new work item. The automated workflows within Microsoft Dynamics CRM will capture information inputted by loss prevention employees and distribute it to other teams within Lackawanna, including alerting the requester that the task is completed. Additionally, the pre-built templates within Microsoft Dynamics CRM auto populate to make visits with clients and the reporting that follows more efficient.

Lackawanna has seen quick user adoption of Microsoft Dynamics CRM, which is due to the familiar Microsoft interface alongside training and support provided by Hitachi Solutions. Hitachi Solutions' dedicated insurance specialists were able to provide a strategy for Lackawanna in the language employees understand. By providing effective training and a project team on call for additional help, Hitachi Solutions ensured that Lackawanna was up and running, and self-sufficient, on Microsoft Dynamics CRM in a timely manner.

"Right from the beginning, Hitachi Solutions stepped up and went above and beyond what we had expected," said John Burns, VP MIS at Lackawanna. "Hitachi came in, did the training, was effective, laid everything out, and had the right people doing it all. Overall I'm extremely pleased with the relationship. I've been in IT for 30 years and haven't seen a project managed so effectively."

BENEFITS

Heightened Customer Care

Microsoft Dynamics CRM allows Lackawanna to stand out from the competition in the customer service-driven insurance industry. Employees are able to search for clients that wouldn't have previously been on their radar. Particularly for accounts that are just under the threshold where loss prevention services are received, employees can filter by premium level to target those borderline accounts. Employees are able to touch base with these clients and let them know the services that are available to them.

"Workers' compensation in Pennsylvania is just that – workers' compensation in Pennsylvania. No matter who provides it, pricing is regulated," said Burns. "We have to set ourselves apart. Dynamics CRM allows us to do that."

Greater Access to Data Across The Organization

Microsoft Dynamics CRM reduces Lackawanna's non-value added time in reporting and client communications. The results are seen organization-wide, from a loss prevention employee being more productive in the field to a manager's ability to track performance and hold team members accountable. Additionally, from a corporate level, management is able to share data that's driving losses across departments in order to develop a plan to assist in reduction of accidents and injuries from the loss prevention

WHY HITACHI SOLUTIONS?

Hitachi Solutions is one of the largest, most qualified and highly experienced Microsoft Dynamics consulting firms across the globe, capable of handling complex tier-one displacement projects. Our company's caliber of expertise and commitment to customers is evidenced through our consistent recognition from both Microsoft and industry analysts. Contact a Hitachi Solutions expert to discuss how our Microsoft Dynamics Solutions can help improve your productivity.

consultant side. The data and information is able to come full circle and provide deep analysis of trends.

"Hitachi Solutions did a beautiful job of gathering our team together, getting us all to look at that same vision, and creating the coordination and cooperation between all the departments in this organization – it became a project for all of us," Nicolosi said.

Continuous Support

Bing map functionality allows employees on the field to see different agencies, customers, and insured accounts that are located within a given radius by simply pushing a button on their tablets or laptops. Right from the maps screen, they can pull up that customer's record to find key information such as claims or policy renewal date so they are prepared for an in-person visit.

"This CRM application allows us to visit other customers because we can find them using the 'find nearby' function," said Nicolosi. "Now, when we're out in the field, already 100 miles from home, we can see who else we have in the area in order to potentially conduct an impromptu visit. That's going to be a huge productivity savings and a big touchpoint for us in the very near future."