



Atlas Insurance Agency

Company snapshot

Atlas is the largest and oldest agency in the state of Hawaii, as well as one that has been voted "the best place to work" three years in a row. Its owners are not only dedicated to the community but to professional development and coaching the next generation of insurance leaders through the University of Hawaii.

"For us, WorkSmart opens up many more avenues for exponential efficiency gains."

Kathy Kano,
Executive Vice President, Atlas Insurance Agency

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Vertafore® Solutions:

Sagitta®

WorkSmart®

BenefitPoint®

ReferenceConnect®

Proven results:

- Increased certificate issuance by 30%
- Increased benefits business by 30% through cross selling
- Enabled agency to explore back office offshoring for additional cost reduction and efficiency gains

Integrated Vertafore® solutions help Atlas Insurance increase revenue, enhance efficiency, and position for the future.

Most people think of the Hawaiian Islands as destinations for a tropical vacation. But, for Atlas Insurance Agency, it's all business. This highly successful organization, headquartered in Honolulu with offices in Maui and on the Big Island of Hawaii, is not only the largest agency in the state, but one of the most technologically advanced.

Atlas' relationship with Vertafore started back in 2000, when this 110-person agency began searching for a new agency management system to replace its legacy system. After much due diligence, Atlas' leadership went against convention and chose Sagitta®.

"At the time, our peers thought we were nuts. We were the only ones in the state on Sagitta—everyone was with a competitor," explained Irlene Torres, AVP, unit manager, IT, for Atlas Insurance Agency. "But, we were progressive; we understood the long-term value of an integrated solution."

Years later, everyone agrees the agency made the right choice.

"The integration impacts all parts of our business. Accounting, for example, can now work in Sagitta, instead of generating an Excel report," *she said*. "We're all working from the same centralized database."

From Paper-Based to Standardized, Paperless Workflow

In 2009, the agency purchased Vertafore's WorkSmart®, which not only eliminated reams of paper, but, more significantly, brought intelligent workflow to the entire organization. The solution improved visibility, standardized processes, and transported Atlas firmly into the digital age.

"Before WorkSmart, we were all paper, with no best practices for document management and no repository for electronic client files," Torres explained. "We were living in a paper environment when the world was going digital around us. We needed a more efficient way to access our documents, instead of filling out a form every time we needed something from the archive."

Atlas' management knew that gaining efficiencies would take more than implementing a new system. They needed employee buy-in to get everyone on board with the change, so the agency could realize efficiency gains faster.

"We have two generations of employees, and are missing all of those in the middle. We have young people, and people who are five years to retirement. You don't have to sell young people on technology—they're waiting for it. But, we had to find a way to get our more mature users on board."

Kathy Kano,
Executive Vice President, Atlas Insurance Agency

So, Kano created a multi-disciplined committee for WorkSmart implementation, which included a large number of the agency's more mature users.

"We made sure our older personnel had a say, bought into the change and became emotionally involved in the project," Kano said. "They became our advocates, spreading the excitement to their peers. We had a 70-year-old woman on staff, who is now retired, that loved WorkSmart as much as our younger employees now."

The agency also formed a committee to determine where documents would "live" in WorkSmart, as well as a committee that focused on workflow. According to Kano, standardizing processes and workflow was essential to the success of this project.

"We all know that people can do the same job differently from department to department, or even within the same department," she said. "Establishing roles and workflow through WorkSmart makes us more standardized and more efficient."

Standardized Equals Streamlined

By ensuring that everyone puts work in the workflow, Atlas can better manage individual employee's workloads, and provide help if they're falling behind on specific tasks. Just as important, the agency can now provide much-needed support for its smaller locations on the Big Island and Maui.

"Our branch locations are smaller, so there was no real backup when someone was

sick or on vacation. With WorkSmart, that backup is seamless," Torres said. "The main office on Oahu can pull work off WorkSmart to help the neighbor islands eliminate their backlogs."

"Establishing roles and workflow through WorkSmart makes us more standardized and more efficient." Irlene Torres, AVP, Unit Manager, IT, Atlas Insurance Agency Atlas recently took this efficiency to the next level by moving all processing functions for a remotebranch to headquarters.

"By doing the work here, in one place, we simplify employee training, streamline our processes, and solidify our stand as one organization," Torres said. "Every branch is no longer an entity unto itself."

In addition to bringing Atlas new operational options, it has also delivered some measurable results.

"We measured certificate issuance and saw a 30% productivity increase from our top issuers," Kano said. "That increase is primarily due to the accessibility and mobility of the digital documents. Account managers can flag things and send to our account assistants in minutes. That's had a big impact."

Customer service has improved as well.

"Because there's no delay in finding documents, we can respond to our clients more quickly," Torres said. "That's a huge advantage." motor vehicle report (MVR) information tied to a particular driver's license.

Integration as a Revenue Enabler

When Atlas wanted to grow its benefits business, agency management replaced an existing system with BenefitPoint®. In addition to providing the features and capacity that Atlas needed, BenefitPoint integrates with Sagitta, giving agency personnel a comprehensive customer view.

"Integration takes the towers down. So, now, we don't have a benefits client or a property/casualty client, we have an Atlas client," Kano said. "This creates a cross-sell opportunity we never had before."

Now, every account executive can see all existing Atlas house-owned clients. That means, they can identify property and casualty clients who could be benefits candidates, and benefits clients who might have a need for property and casualty.

"When we started using this data for cross-selling, we saw some pretty impressive results," Kano said. "Our benefits business grew exponentially by 30%, mostly due to cross-sell."

At the same time, the integration between Sagitta and BenefitPoint brings efficiency.

"Our accounting department no longer has to reconcile journal entries, or wait for a benefits person to supply a number... We can close out each month accurately."

Kathy Kano,
Executive Vice President, Atlas Insurance Agency

Delivering the Right Solutions for Today and the Future

Over the years, Atlas Insurance has brought on a variety of Vertafore solutions, not only for efficiency, but to gain a competitive advantage in an ever-changing industry.

"Having come from a national broker, I can say that, to compete, independent agencies need resources at their fingertips, because the big brokers have those tools," Kano said. "With Vertafore, we have a partner that brings the new products and services that allow us to compete. They even the playing field for independents like us."

According to Kano, these Vertafore tools, particularly WorkSmart, give Atlas strategic options it didn't have before.

"As great as WorkSmart is, people can't look at just features alone. Instead, agency executives have to ask 'what does WorkSmart mean to the future of our agency!'" she said. "For us, WorkSmart opens up many more avenues for exponential efficiency gains."

For example, the standardized, consistent processes and workflow orchestrated by WorkSmart makes it possible for Atlas to explore outsourcing as an option for its less strategic back-office processing.

For Kano, that's what technology should do: not only support physical transactions but also support an agency's strategy.

"With Vertafore, we have the technology that enables us to respond to change, and stay competitive in the process," she said.

"It gives us the flexibility to think strategically and position our agency to be successful not only today, but in the future."

Kathy Kano,

*Executive Vice President,
Atlas Insurance Agency*



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