



Harleysville Insurance

Company snapshot

Harleysville Insurance was founded in 1917 when residents of Harleysville, Pa., united to share the risk of automobile ownership and operation. Harleysville Insurance currently employs about 1,700 people and deals with approximately 1,300 agencies across 32 states. The company provides insurance products and services for small and mid-sized businesses, as well as for individuals.

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*Manager of Imaging,
Harleysville Insurance*

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Vertafore® Solutions:

ImageRight®
ReferenceConnect®
TransactNOW®

Proven results:

- Distribution of work across 16 locations with 1,400 users
- Tight integration of desktop and workflow
- Immediate enterprise-wide access to information
- Integration with internal and external systems
- Improved communication with customers
- Improved operational efficiency

Vertafore® ImageRight® facilitates realignment of commercial underwriting at Harleysville Insurance.

Competing in today's property and casualty insurance marketplace requires the ability to efficiently route work across multiple office locations and rapidly share information between various partners. At regional property and casualty insurer, Harleysville Insurance, that meant exchanging legacy workflow and document imaging for modern capabilities.

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The Challenge

Optimizing Harleysville's commercial underwriting document and workflow capabilities presented formidable challenges, according to Frank Lally, Manager of Imaging for Harleysville. Implementing an enterprise workflow tool that would serve a large number of users across 16 locations required integration with legacy production systems and an extensive backfile conversion of existing paper files.

The Strategy

Among the most important criteria that Harleysville applied to competing solutions were:

- An out-of-the-box electronic file structure that closely matched how users worked with their files.
- Integration-friendly workflow capabilities requiring minimal custom development.
- Seamless integration with all other desktop functions to access and view files.
- A vendor to deliver a functional system in a relatively short time.

Installation

During the implementation phase, Harleysville integrated the solution with several mainframe and client/server systems, using ImageRight integration utilities and a third-party tool that integrates with ImageRight to convert mainframe advanced function printing (AFP) output to images. By integrating ImageRight with these systems, Harleysville has been able to avoid printing a variety of reports and then imaging them, according to Lally.

No new hardware was required to install ImageRight, and the technical dimension of the implementation was a "relatively painless" process that raised no major issues, according to Lally. However, Harleysville faced greater challenges in the change management aspect of the transformation of capabilities.

"The objective was to automate the imaging of various policy output, billing, and error reports, all of which become part of the underwriting file and are integrated as part of the workflow. Other client/server integration is used to facilitate communication with external customers."

Frank Lally, *Manager of Imaging, Harleysville Insurance*

"The approach was to simplify workflows and provide strong, on-site presence of both business and technical people during the initial start up," Lally says. "Vertafore facilitated the initial training, including 'training the trainer,' and we were able to successfully deliver training during the rollout."

The rollout extended to all of Harleysville's major underwriting and claims operations, where the ImageRight product now supports ongoing workflow evolution to meet constantly changing business requirements, according to Lally. The system currently supports over 1,400 workflow users, including all 16 commercial underwriting locations and four claims centers.

Real-Time Access, Enterprise Wide

Lally reports that the ImageRight solution has facilitated efficiency improvements by providing enterprise-wide real-time access to policy information regardless of the location of underwriting and claims staff, as well as enabling communication with external customers.

"The application provides excellent integration between desktop and workflow, as well as strong workflow design capabilities and the ability to interact with external systems," said Lally.

Another advantage—the ImageRight solution enabled a significant reduction in floor space requirements formerly used for storing paper files, a benefit that facilitated office space downsizing goals.

A Higher-Level Transformation

While reducing space is important, Harleysville was aiming at higher-level transformation goals throughout the process. In that respect, the implementation has been a success, by Lally's accounting.

"The ImageRight implementation has played an important role in a major organizational change and realignment," said Lally.

An existing relationship with Vertafore helped foster the success of the initiative—Harleysville was already a user of ReferenceConnect® reference library and TransactNOW® agent/carrier communications and transaction processing platform.

"Our access to qualified ImageRight staff facilitated timely and successful implementation," said Lally. ImageRight now provides Harleysville with the ability to react to a changing business

environment with flexible workflow capabilities, and Lally says he expects Vertafore will continue to improve capabilities into the future.

"We look forward to seeing a production-ready version of the next-generation product that is scalable to Harleysville's environment," said Lally.

Among the features Lally anticipates are enhancements that better address the capture and handling of electronic documents and "canned" integration tools across the vendor's suite of products. "We also anticipate improved workflow management tools that can deal with large, complex workflow environments, and improved workflow reporting that is more open and extensible by the user."

The Bottom Line

"The ImageRight implementation has played an important role in a major organizational change and realignment at Harleysville. "

Frank Lally, *Manager of Imaging,*
Harleysville Insurance

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