

How Alliance Solution Collective Increased Productivity by 25% in 6 Months Leveraging Microsoft TANDEM



Client Name

Alliance Solution Collective



Industry

Group Insurance Provider



Location

Montreal, Quebec

Brief

Based in Quebec, Alliance is an innovative and rapidly-evolving agency specializing in group insurance and retirement plans for independent advisors. Their role is to fully enable their clients to easily and quickly offer customized insurance solutions from 11 of the top insurance companies in Canada. They provide cutting-edge software solutions to facilitate management of group insurance and subscriber claims. Alliance facilitates sales enablement, back office support, high levels of customer service, full SEO services, and more, helping both small and large agencies to successfully grow their businesses.

The company started 6 years ago with 27 employees, 125 brokers, and 1000+ corporate clients, and they have doubled each year for 4 years. At its core, Alliance is a family business bringing more than 30 years' experience and expertise to the industry, making them a leader in group insurance for small-to medium-sized businesses and large corporations.

Alliance Team



Jean-Simon St-Laurent

Director of Operations
Group Insurance Plan Advisor



Clément St-Laurent

General Manager
Group Insurance Plan Advisor



Suzanne Fortin

President
Group Insurance Advisor

TANDEM
POWERED BY XRM VISION

Leads and opportunities by stage

1 - Identify Lead	3562
2 - Qualify Lead	9247
3 - Identify Need	108
4 - Setup Group Plan	1202
5 - Prepare Quote	4000

Open Leads: 9247

Lead Average Age (Days): 108

Lead Win Rate, Last Period: 11.84%

Opportunities Average Age (Days): 63

Renewal Rate: 95%

Active Policies Including Forecasted: 90%

Top Opportunities

Accounts	Date	Value
Canadian Tower	19-09-01	\$5 756 520
Unicorn Group	19-08-15	\$4 654 380

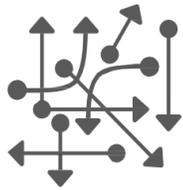
Policies Sold

Insurance type: Dental, Life & LTD, Medical, Group sold

Active Policies Including Forecasted: TPA, Benefit Partners, Coaches, Callers, Group Sold Plan

XRM Vision's expertise and solution helps Quebec's leader in group insurance **increase productivity by 25% in 6 months** while improving security and flexibility.

Challenges



- Before implementing TANDEM by XRM Vision, Alliance struggled day-to-day with an inefficient system comprised of Excel and Word files, cutting and pasting data, and emailing documents. It also took up to 6 months to update and enhance outdated versions of their system. These inefficiencies caused security concerns, lost productivity, duplication of work, and lengthy employee training time.

Concerns Facing the Executive Team



- Looming insufficient growth in revenue
- Risk due to customer data security issues
- Inability to keep up with and properly meet customer demands
- Staying relevant and ahead of the competition

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We were afraid of not being able to deliver the service expected by our customers.
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Jean-Simon St-Laurent
Director of Operations, Group Insurance Plan Advisor

Challenges Managers Were Facing

- Unreliable technology did not allow for adequate reporting or needed data back-up
- Inefficient, cumbersome business processes to achieve desired outcomes
- Could not meet changing client needs: insufficient access to data, customer reports, and inability to export data or monitor important key performance indicators, other than standard financial reporting
- Concerns about staying ahead of competitors due to inefficiencies
- High employee turnover rates in Quebec, excessively lengthy, 6-month training period for new employees
- Lack of support from existing suppliers made onboarding new employees difficult and time consuming, taking time away from the current team and their important work

Without creating more flexibility in their technology, Alliance risked going bankrupt. The insurance industry is highly competitive, and they feared being overtaken by a larger company. They needed to differentiate with innovative technology to transform and keep moving forward. Their urgency was a result of increasing technological changes within the industry and the need to keep up with client demands.

Limitations Faced by the IT Department

- Unable to backup data, run reports, and have better access to data
- Needed greater flexibility to connect with the HR platform
- Old supplier would take 6 months to update crucial documents for brokers
- Unable to export data in any form, not even client lists in Excel
- High margin of error: old technology included multiple, separate processes
- Risk and fear of data being compromised/infiltrated, data system being attacked or breached

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Because of the complexities of running our operations, we took 2 years to assess all available solutions. We selected TANDEM by XRM Vision because it met all our needs.

Jean-Simon St-Laurent

Director of Operations, Group Insurance Plan Advisor



The Project

XRM Vision approached Alliance's challenges by analyzing, scoping, and mapping the organization's internal processes to find the right approach, then collaborated on a strategy. There was no pilot phase, but the roll-out took place over 3 days. Because of this thorough preparation process, the roll-out went very smoothly. Alliance was pleased the project was delivered on time and on budget. Their pain points were immediately resolved, and they saw increased productivity, capabilities, flexibility, and security.

Why XRM?

XRM Vision was selected for both industry expertise and product excellence and were referred by word of mouth. Unlike their competitors, XRM offered three core unique advantages. First, they have existing insurance and industry-specific expertise, so they could immediately assist with no ramp-up time needed. Second, they offered a pre-configured, out-of-the-box system that already meets the needs of insurance companies, which reduces time, cost, and risk. Third, it is powered by Microsoft Business Central – a proven solution with millions of users – and leveraged their existing investment in familiar front office Microsoft productivity solutions, such as Outlook, Word, Excel, OneDrive and TEAMS, reducing training time and offering optimized integration across all existing Microsoft applications.

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For us here at TANDEM, we view Alliance as much more than a client. In fact, they are more like a partner.

Valerie Durand
Product Owner

The Results

25% increase in employee efficiency and productivity

Shifted from being behind competitors to forging ahead of competitors

Shorter sales cycle leading to increased revenue and lower cost of customer acquisition - faster sales, quotations, and renewal analysis

Faster accounting: billing, commission payments, resulting in earlier payments

Reduced employee turnover and increased employee satisfaction

More flexibility: viewing of net income by brokers and clients, quotes, reports by carrier, and termination of policy, allowing for more control and greater ability to monitor revenue streams

Less risk with increased security: MFA Data backup, Bitlocker security, constant security updates



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This was a big project and we worked with a team that was very human and warm. I strongly recommend XRM Vision to all my colleagues in the group insurance industry.

Jean-Simon St-Laurent

Director of Operations, Group Insurance Plan Advisor

Outcomes from the Leadership's Perspective

Regained competitive edge in the industry

- Have more control and less risk - security is now tailored to specific roles in the company, allowing for protections for commissions, guarding of sensitive information (e.g., salaries, medical history)
- Increased ability to differentiate and quickly respond to changing customer needs
- Company positioned to be an industry leader

Outcomes from the Line of Business Managers' Perspective

- New employee training reduced to 1 month from 6 months
- Faster customer response rates due to easier and more intuitive technology and optimized work flows instead of relying on multiple, separate point systems
- Less wasted time due to more control of documents with full flexibility to modify
- More productivity due to an increased ability to change, create, and map business workflow and operation processes quickly and easily

Outcomes from the IT Department's Perspective

- Monthly updates to the system instead of every 6 months
- Flexible HR integration
- Security risks and errors vastly reduced or eliminated
- Secure data backup



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