

## CASE STUDY

# Insurance



### Leverage SharePoint® to enhance collaboration and improve quality of service to customers

## Industry Overview

Today's insurance industry is information-intensive, extremely competitive, and future success depends on controlling operating expenses, increasing efficiency and above all, retaining customers with a high level of service. Insurance companies are leveraging Microsoft® SharePoint to enhance collaboration among employees, migrate away from legacy applications, and improve the quality of service provided to customers. Unfortunately, though extremely powerful as a platform, SharePoint's out-of-the-box capabilities do not always deliver all the functionality that technology companies require to deliver solutions that enhance their business processes. Coupled with Bamboo's portfolio of products, it becomes possible to deliver the solutions necessary to better serve their customers.

## Solutions Brief

A local health insurance firm was experiencing a large growth in demand for collaboration, and decided to implement SharePoint in order to provide a higher level of service to their customers. With specific functionality in mind, the insurance firm proceeded with the planning and implementation to meet the initial requirements. They wanted a way to poll customers on certain subjects, provide an easy way for customers to register for local events, and offer a knowledge base repository that could provide answers to common questions for customers when firm's staff is not available.

One of the firm's priorities was to minimize the development time and also the subsequent maintenance required for their solution. They turned to **Bamboo Premier**. Not only could it provide the components for the initial three requirements, it could also address future requirements the firm was anticipating. Use of the components from Bamboo's portfolio of products accelerated development and also provided a consistent look and feel for end users.

For the customer poll, the firm wanted to make sure that users had a smooth experience; that they could only answer once, and upon answering the poll, could view the results of all the respondents. They were also concerned about the presentation of the data for internal purposes. The insurance firm required a horizontal bar graph view of the resulting data as well as a means to store and maintain a history and results of all

previous polls. These objectives were achieved through the use of the **Poll Web Part**.

For the event registration, the firm wanted to present a list of events on a calendar and allow customers to register for events that interest them. They needed the events on the calendar to be color-coded so customers could easily differentiate types of events. While SharePoint out-of-the-box has limited calendaring capabilities, with the **Calendar Plus** web part, the firm was able to add the needed color-coding to their calendars. They also needed to proactively push reminders out of the system to their customers when registered events approached, or if space was left a few days before an event commenced. Finally, the firm wanted to display registration information on a dashboard so they can monitor registration activity and easily distinguish popular events that should be offered more frequently.

For the Knowledge Base, the firm used Bamboo's **Knowledge Base**. This solution provides all the features of a complex knowledge base without any custom development effort. Users were able to browse or search for articles using the same tools they used to search the rest of the site. Once found, they could rate articles and provide comments. Because Knowledge Base tracks how many times each article has been viewed, users can browse through popular articles first, if desired. When an employee cannot find needed information, he simply submits the new question.