

CASE STUDY – BHH BENEFITS



The organization

BHH Benefits is a privately-owned Canadian company that provides insurance benefits consulting for clients throughout Ontario. It negotiates with insurance carriers, such as Great West Life and Sun Life, to obtain the best combination of options and pricing, and presents that solution to its clients or prospects. Throughout the year, the company has quarterly and annual reviews with its clients, and expedites any issues between the client and the carrier.

BHH had an existing customized Act database (its contact management system) to keep track of its clients, and to organize and track communications through emails, phone calls, appointments and tasks. The Act database was not robust enough to keep up with the needs of an ever-growing business.

The challenge

BHH had many executive staff members who worked collaboratively with its clients, much of which was completed remotely. The key problems were:

- No integration between Act and Microsoft Outlook
- No integration between Act and BlackBerry devices
- Manual Excel spreadsheets for tracking prospects
- Existing Act database was crashing several times per day
- Duplication of data
- Massive quantities of documents were currently stored on BHH servers, which made locating these documents both time-consuming and difficult
- Manual Word documents to track results of client meetings and to assign and track tasks resulting from those meetings
- Several key processes at BHH required manual creation of tasks

Why Microsoft Dynamics CRM

BDO was chosen to implement the new system based on its extensive experience in Project Management and operational change, along with our strong productivity skills and efficiency

improvements. In addition, BDO had a 30-year relationship with BHH's trusted advisors at its CA firm. We suggested Microsoft Dynamics CRM to address the company's requirements for the following reasons:

Integration with existing Microsoft products

- BHH used Microsoft Outlook extensively and needed a CRM solution that would integrate tightly with Outlook, particularly with its BlackBerry devices through a BlackBerry Enterprise Server
- CRM provided automated workflows to create tasks based on pre-defined BHH processes

Ease of use

- Microsoft Dynamics CRM was easily customized to deal with the workflow requirements of BHH
- With a standard Microsoft interface, CRM is an easy system to learn

Vendor stability

- CRM runs on the proven industry standard database, Microsoft SQL, and is currently in Release 4.0
- By using proven technology, BHH will be able to maximize the return on its investment and continue to build on its existing Microsoft technology

SECTOR

Insurance

ABOUT BDO

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BDO is the sixth largest accounting and advisory firm in Canada with 95 offices nationwide. Our professionals have the expertise to serve owner-managed, large and mid-market companies, communities and non-profits in a broad range of industries.

The results

- A new Policy Contracts entity was created in CRM to record all of the details of each policy for every corporate client of BHH
- A new Amendment entity was created to record all of the details for each subsequent modifications to a policy contract
- Three additional new entities were created for Benefit Booklets, Schedules of Benefits, and Policy Contracts, which enable BHH to track all of the details for these items and provide a location to attach the external documents, creating a paperless file cabinet with searchable records from all appropriate entities in CRM
- A new Carrier entity was created with links to the appropriate web locations for those carriers and to all policies at that carrier for BHH clients
- Over 20 workflows were created in CRM to automate the company's pre-defined processes, the most complicated of which creates over 15 specific tasks, emails, and appointments (all at pre-defined times) and assigned to the proper individuals at BHH
- Word templates were created to automate the creation and attachment of letters, fax cover sheets, envelopes and labels
- Considerable modifications were made to the Account entity in CRM to create a prospect rating and tracking system that, in conjunction with a customized Sales Process workflow, has greatly improved the business development functionality at BHH



BDO Solutions helps small, medium and large size organizations align technology to their overall business strategies using Microsoft technology. We specialize in implementing Microsoft Dynamics GP and NAV and Microsoft Dynamics CRM enabling our clients to streamline their business processes and improve overall operational efficiency. For additional information please contact:

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