

RSM! McGladrey

Accounting | Tax | Business Consulting

“We could have chosen an industry specific system that handles 90 percent of our needs out of the box but instead selected Microsoft Dynamics™ CRM because we would own the system, have the flexibility to make customizations, and would not incur any monthly fees”

Innovative Benefit Planning (IBP) is an employee benefit consulting firm servicing mid-sized businesses with 50 to 1,000 employees. Customer service is what sets IBP apart. Acting as an extension to a Human Resource staff, they handle employee questions about coverage, manage eligibility updates, assist with claims resolution, and work as a liaison between insurance carriers and their clients.

“We were up and running in two days without any down time. I had been through other implementations and knew the possible headaches, but we encountered minimal problems. Everyone is familiar with Microsoft - yet the success of the implementation really goes back to the Microsoft Certified Partner that you are utilizing and who is going to be there when you have a problem. That is why we chose RSM McGladrey as our partner in this implementation.”

— Greg Capone
Director of Employee Benefit Services
Innovative Benefit Planning

Background

IBP had been using a propriety system written in Microsoft Access, managing activity in Microsoft Outlook's Saved Folders, and saving plan details to network drives. Information was not easily accessible for this business centric to customer service.

Project

RSM McGladrey implemented Microsoft Dynamics™ CRM Business Solution to organize information and improve customer service. IBP's client information is so sensitive that upon receipt, it's immediately scanned, shredded, and entered into the CRM system. The now paperless operation is able to find answers with a few clicks of the mouse. This increase in efficiency has also allowed IBP to offer additional services and handle larger clients without increasing staff.

In the long run, it is IBP's clients that truly benefit from their customer service efficiencies. It eliminates much of the paperwork associated with benefits administration while offering the personalized tools to report on the activity specific to that client.

Outcomes

- Made insurance companies more accountable – everything is name, time, and date stamped
- Customer service is delivered much quicker and smoother
- Added personalized service to prospects and clients
- Increased efficiency by making all information more accessible
- Saved thousands in Total Cost of Ownership (TCO) by avoiding costly monthly fees and add-on solutions