



# INNOVATE

Digital Transformation Made **SMARTer**

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## Selecting the Right Team for Digital Transformation Success

David Whitesell, Pekin Insurance

Raymond Rosa, ValueMomentum

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# Partnering together as “OneTeam” makes all the difference....



**David Whitesell**

Assistant Vice President  
Pekin Insurance



**Raymond Rosa**

Customer Communication Mgmt. Director  
ValueMomentum

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# Pekin Insurance – Beyond the Expected for 98 years

## Quick Stats

**900+** Employees

**1500** Agencies

**8500** Independent Agents

**\$2B** Combined Assets



Established  
in **1921**  
and based in  
central IL



Offers products  
for **Personal,**  
**Commercial**  
and **Life** lines of  
business



Operates in  
**6 major**  
**states:**  
AZ, IA, IN, IL,  
OH, WI

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# Pekin Insurance Virtual Overall Transformation (PIVOT)



## Business Priorities

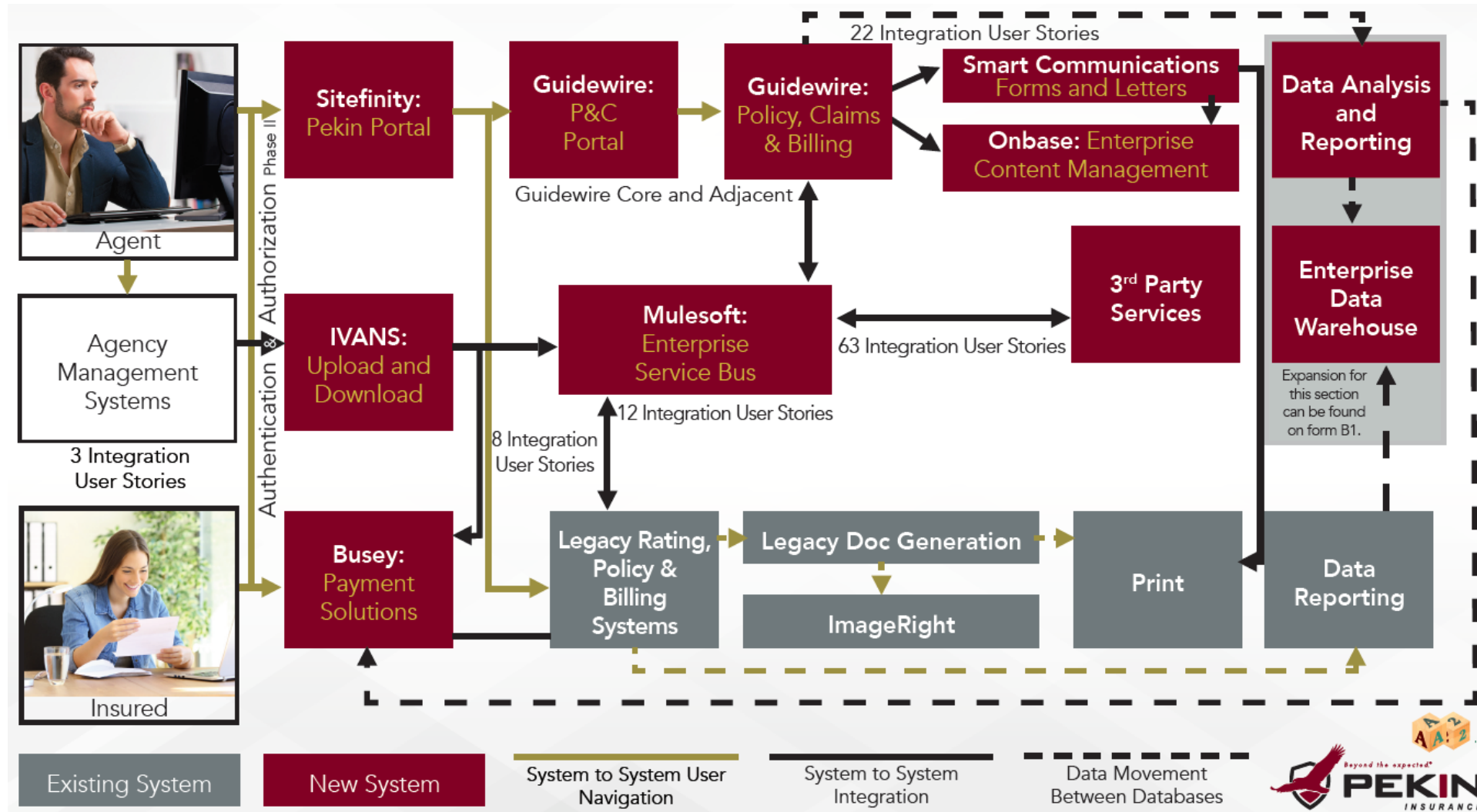
- Deliver initial personal and commercial release
- Generate momentum
- Develop broker front-end solution

## Deliver Feasibility

- Deliver in a series of releases
- Maintain out-of-the-box conformance
- Focus on “common” agent experience

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# PIVOT: Pekin Insurance Virtual Overall Transformation



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# Our Approach

## Identify Challenges

- Aggressive rollout of 12 months for delivery
- Longer-than-usual time to ramp up resources with right skillsets to match program pace
- Identifying all core, adjacent, and dependent components, including tool to be used for program development and delivery
- Design a scalable cloud-first architecture by selecting right tools-stack

## Set Goals for “Quick Wins”

- Defining guiding principles for the program and the enabling actions
- AGILE, AGILE, and AGILE approach
- ONE team: We succeeded because of committed leadership and the people behind PIVOT

**“Leaders seek new opportunities to help solve their most complex challenges”**

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# ValueMomentum Corporate Facts



**90+**

Customers Served



**Top 10**

NA P/C IT Svs Provider  
by # of customers



**2250+** Employees



**15 > 5**

year client relationships



**23%**

CAGR since inception



Fastest Growing P/C IT  
Services Provider in North  
America

Established in 2000;  
organic growth since inception



HQ in NJ; Delivery Centres in  
NJ, USA & Hyderabad, India

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# The ValueMomentum Offer

- SMEs in Insurance, P/C business knowledge and best practices
- Developed accelerators and tools to speed up forms delivery
- Helped develop new apps to make current applications more efficient
- Created objects to increase usability and reduce allocation maintenance
- Ability to do proof of concepts with new modules as needed
- Currently 110 business users are using Draft Editor to reduce IT costs and increase productivity



# (CCM) – Objectives at Pekin



## **Streamline Operations & Achieve Productivity:**

- Optimize customers' communication delivery costs
- Retire redundant legacy systems and migrate to a modern CCM platform



## **Enable Multi-Channel Communications & Increase Engagements:**

- Ensure consistent branding and messaging across all communication channels
- Deliver all of customers' documents to their preferred delivery channels



## **Ensure Compliance and Governance:**

- Centralize all forms/documents and template versions for compliance and consistency
- Control all document approvals and template-based communications including audit trails



## **Enable Business Users & Gain Transparency:**

- Enable document owners to edit and approve content for different channels
- Enable users to make content changes using pre-approved templates

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# SmartCOMM Engagement at Pekin

Release	Product/LOB	Total Forms Count	Status	States	Quote Available
R 1.1 & 1.2 + Rollover 1.0	Personal Auto, Commercial business owners policy	358	Completed	IN, IA, OH, IL, WI [PA] IN, IA, OH [DBOP] IL, WI [DBOP]	08/06/2018 08/27/2018 9/15/2018
R 2.0	HO-MH, IM, WC, and PUMB	478	Completed	All States [WC] IA, IN [HO, PUMB]	12/01/2018
R 3.0	Claims, Commercial Auto, Commercial Umbrella, Billing	816	In progress	All States	TBD
R 4.0	Commercial Package (Property, Crime, Inland Marine, Garage, General Liability), Claims	1145	Yet to start	All States	TBD
R 5.0	Boat, Dwelling, Fire, Recreational Vehicle, Motor Cycle	300	Yet to start	All States	TBD

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# The Results Are In!



- Since implementing Smart Communications Pekin has seen nearly a **67 percent** reduction in document generation process.
- What used to take nearly three weeks to produce a document can now be accomplished in **one week**.
- Pekin has reduced costs by **29 percent** by migrating their to the cloud

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