

SmartDraw Software's Visual Process Management Solution Dramatically Improves Efficiency and Profitability for Reliant General Insurance



Leading Southern California Insurance Company Benefits from Visually Documenting and Sharing Processes Company-wide

One of Southern California's premier insurance wholesalers, Reliant General distributes their products throughout the state through a growing network of more than 1,800 independent brokers. With so many daily transactions, having their processes well documented is critically important to the company's success.



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Dana Dodds,
CEO

The Need for Documentation

One of the most common problems faced by organizations of every size is the “key employee” problem. A key employee is an employee who has exclusive knowledge over a vital area of the businesses normal operations. If the key employee is suddenly unavailable, there is no one who can easily and seamlessly fill in and perform the position's processes.

In Reliant's case, the key employee problem arose when the manager of the accounting department went on an extended vacation. Though she had outlined and documented her processes, it turned out that her documentation was not complete enough to adequately guide her assistant through all her normal duties, and a slew of accounting issues developed as a result.

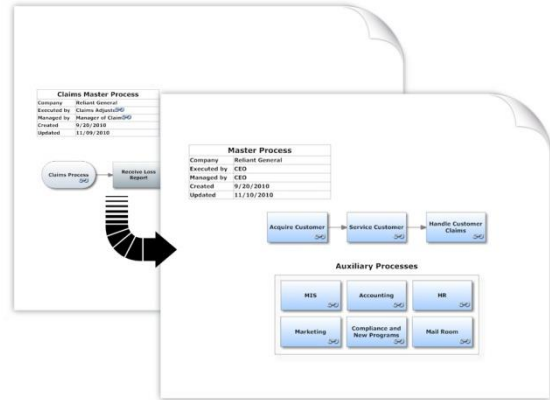
To ensure that kind of issue would never arise again, Reliant decided to do a complete inventory of their company's entire body of processes and to update the documentation in a consistent way.

The Visual Process Management Solution

Instead of traditional process documentation, Reliant chose to implement SmartDraw Software's Visual Process Management (VPM) solution—an entirely new way of capturing and storing process and organizational information that presents it with visuals instead of text.

SMARTDRAW SOFTWARE CUSTOMER PROFILE

A VPM collection is a hyperlinked network of flowcharts, org charts, and “job maps” that organizes process information hierarchically. Using SmartDraw, users can browse the complete VPM collection like a website. Unlike traditional documentation, which typically resides in binders and folders in a filing cabinet, a VPM collection is entirely digital and is stored on a server which everyone in the company can easily access and view. Users with sufficient rights can instantly make changes as needed.



“This product has made my job as a manager easier”

Rebecca Abello,
Underwriting Manager

One of the greatest improvements of VPM over traditional methods is the live capture of information. In this method a VPM facilitator interviews each employee and, using SmartDraw, documents their processes in *real time* in a single pass. This way processes can be captured and documented extremely quickly. It took just six weeks to capture and document all of Reliant’s processes, which included more than 450 flowcharts. In fact, the VPM interview process was even described as “fun” by members of Reliant’s management.

Following the documentation process, Reliant used its new VPM collection during an audit of their underwriting and claims procedures. Instead of either referencing and/or updating their old documentation, they were able to simply show their VPM collection to the auditors.

“With the SmartDraw VPM collection, I can simply categorize what areas they’re auditing, whether it’s the Accounting or Underwriting Departments, and I’m able to give that to them in electronic format and they can easily click the links that are provided and makes it really easy,” said Rebecca Abello, Underwriting Manager. “The feedback I got from the auditor was that this is probably one of the easiest audits they’ve ever had to do and probably the quickest because of the fact that we had the processes documented visually.”

But Reliant’s documentation was meant for more than just impressing their auditor: because visuals are more effective at communicating information than text alone is. “I was able to see a process in one page or two pages” said Abello. “In the past it would be six to eight documents...it would just take me forever to go through a procedure when now I can just look in one to two sheets and I know exactly what I need to do.”

Because their documentation was now stored digitally (instead of filed away in a binder) and is presented in a visual format, Reliant now has the reference material to train members of their team to ensure that, if a key employee leaves again for some reason, there will be someone to fill in and be able to perform the missing employee’s duties.

The Advantages of Live Documentation

Because the VPM collection stored electronically on the file server, where it is accessible to all Reliant employees, it sees daily use which has led to a variety of benefits.

Visibility and Proactive Process Improvement

The greatest benefit of having a VPM collection is complete process visibility. Because of the way the documentation is organized, anyone can view any process, and people actually use the documentation. In fact, the VPM collection initiated a change in company culture in regards to process. Instead acting in a primarily reactive manner towards process documentation by only updating their documentation when there was an absolutely critical need for it—like training a new employee or preparing for an audit—Reliant began to develop a proactive attitude towards process documentation.

“With a proactive tool like SmartDraw, people are much more aggressive in pursuing process improvement,” said Dana Dodds, Reliant’s CEO. “Because they document the procedure in SmartDraw they can show the process improvement and we can measure that. So as a result, it's becoming less of a default activity and more of a proactive activity to show how well they're completing the task they're assigned to do.”

Providing Process Context and the ‘Big Picture’

Having an easily-accessible and comprehensive body of process provided context for Reliant’s numerous processes. This context allowed all Reliant employees to gain an enhanced understanding of their job, understand where their job fits into the big picture of the company’s operations, and greatly sped up the training process. As a result, Reliant employee became much more process focused and more engaged in their work.

“If employees were wondering what happens after they finish a process and it goes to the next department and what happens with that document, they’re able to visually see exactly where it goes and why it went where it went and get a bigger picture of our overall organization and how it works,” Abello said.

80% Reduction in Training Time

The VPM collection has allowed Reliant to train new employees faster and more effectively. In a VPM collection, each one of the processes is assigned to both a position in the company which manages the process and a position which executes that process. All the processes which are either managed or executed by a position are listed in a special index file called a “job map” which contains a link to each of the processes associated with that position. Having all of a position’s processes



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Vice President of Marketing
and Operations

referenced in a single place greatly reduces the time it takes to train a new employee because they can easily find, view and contextualize the processes that they are responsible for.

“It's challenging to get new people up to speed quickly,” said David Sarnowski, Vice President of Marketing and Operations. “To be able to show people visually how processes work and how they fit together makes an amazing difference and has really shortened our training curve.”

“Normally, it would take anywhere from three days to at least a week to get them up and running,” added Abello. “With VPM we were able to literally show them within a day everything that they would see within our organization and how what they do affects the other departments.”

SmartDraw's VPM solution reduced training time, but also satisfied Reliant's audit requirements and exceeded auditor expectations. What's more, it has impressed prospective clients, and solved Reliant's “key employee” problem for good. But perhaps most importantly, it has empowered all employees to proactively improve their processes so they can continue to refine and optimize their business.

“I would tell anybody interested in improving their business processes, written procedures, and ensuring that they have adequate backup for areas that they may not do regularly, that they need this product because for me this product has made my job as a manager easier,” said Abello.

For more information about Visual Process Management by SmartDraw Software, visit www.SmartDraw.com.

About SmartDraw Software

SmartDraw Software helps businesses increase their bottom line by improving communication, refining operations, completing projects on time, and successfully implementing their plans through the everyday use of visual communication.

SmartDraw Software enables business professionals to easily and automatically create more than 70 types of common business visuals, including flowcharts, project charts, mind maps, org charts, timelines and charts, to achieve presentation-quality visuals in just minutes to enhance understanding and knowledge retention.

SmartDraw is used by more than half of the Fortune 500, and thousands of law firms, police departments, health systems and private enterprises of all sizes. For more information or to download a free trial of SmartDraw, please visit

www.SmartDraw.com.

About Reliant General Insurance

Reliant General Insurance Services is a San Diego based insurance wholesaler specializing in non-standard auto since 1991. Reliant General represents California insurance companies to whom it provides underwriting, marketing, customer service, policy issuance and billing support. Reliant General's A Rated programs are available through 1700+ independent brokers throughout the state and offer competitive primary and excess liability auto insurance programs with low down payments and a variety of payment options. Reliant General has built a consistent reputation for excellent service and continuously strives for ways to improve their services through new methods and technology – always with the customer in mind.