



# *PPI counts on Lotus Domino to drive insurance agents' success.*

<b>Application</b>	Competitive product database, file sharing system, electronic information repository, online manual for insurance agent contracts, online human resources manual, news archive, online technical reference database
<b>Business Benefits</b>	\$140,000 in annual operational savings; 100% ROI in four to six months; improved customer service; enhanced information sharing; streamlined business processes
<b>Software</b>	Lotus® Domino™ Lotus Notes®
<b>Hardware</b>	IBM Netfinity®
<b>Business Partner</b>	Team Technologies Inc.

To remain the “insurance agents’ agent,” PPI Financial Group knew it must continue providing the most competitive insurance contracts and top-notch technical, marketing, underwriting and administrative support to 1,300 independent agents who are its associates. However, maintaining eight marketing and three corporate offices throughout Canada presented a significant logistical challenge. Each site operated as an island, and, with little interaction between locations, employees were duplicating tasks and keeping best practices within their offices.

*“By improving our workflow and information-sharing with Domino and Lotus Notes, we are providing our associates faster responses and better information to run their businesses—and our revenues come from their success.”*

*—Jack Brown, Vice President of Information Technology, PPI Financial Group*



*PPI has leveraged its investment in Lotus Domino and Lotus Notes into an array of applications that are helping the company improve service to independent insurance agents.*

Recently, the company began using IBM tools to unify operations and improve back-office services to associates. Working with Lotus Premium Partner Team Technologies, PPI replaced its manual, paper-based systems with seven of its newest applications based on Lotus Domino and Lotus Notes: a database with information on competitive products, a file sharing system, an electronic repository containing contacts and other business information, online manuals for associate contracts and human resource materials, a news archive and a technical reference database.

Using Domino on a range of IBM servers, including IBM Netfinity 5000 and IBM Netfinity 5500, PPI delivers some of these applications through its intranet and others through its public Web site. "By improving our workflow and information-sharing with Domino and Lotus Notes, we are providing our associates faster responses and better information to run their businesses—and our revenues come from their success," says Jack Brown, vice president of information technology at PPI. "We are saving Canadian \$140,000 (U.S.\$92,000) annually, including \$36,000 saved in courier costs and \$18,000 in phone and fax expenses."

### **Leveraging Lotus Domino**

PPI, which considered other vendor solutions, opted for Domino as its Web server. Says Tim Wyatt, PPI's director of information technology, "From its support of our e-mail functions to its distributed replication capability with Lotus Notes, Domino meets all of our needs."

Team Technologies helped PPI develop one of its first Lotus Notes applications—a file sharing system. Using Lotus Notes e-mail file attachments, employees from each site can exchange sizeable marketing proposals and presentations developed at the company's Waterloo Resource Center.

PPI also uses Lotus Notes databases to store industry and company information. Associates can access a news clippings archive through their password-protected Web page on the company's public Web site. From the company intranet, PPI employees can view online manuals and reference materials. In both cases, information from Lotus Notes databases is published seamlessly on the Web page or the intranet using Domino.

### **Capitalizing on investment**

"Basing several major applications on Lotus Notes represents a significant savings because we didn't need any additional software, so we recouped our investment in four to six months," notes Wyatt. Also, the replication capabilities of Domino minimize the need for constant data transmission between sites, so PPI can use 56 Kbps wide-area connections rather than more costly T1 connections at each site.

The organization's information technology staff plans to capitalize further on its Lotus Notes solution by deploying more complex workflow capabilities for case management. Says Brown, "Our Domino and Lotus Notes solution equips us to deliver the best value to our associates."

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