

HITACHI
Inspire the Next¹

Glatfelter Insurance Group Success Story

*Glatfelter
Insurance
Group*



CUSTOMER PROFILE

From business planning to risk management services, Glatfelter Insurance Group markets a wide array of commercial property and casualty insurance, employee benefits products and financial services on a direct basis. Glatfelter's goal is to help clients determine the best approach for assessing and supporting their current needs while also planning for the future.

INDUSTRY
Insurance

LOCATION
York, PA

“Hitachi Solutions found their needs and pain points and what type of solutions the executives were looking for.”

- Pallav Bhonde

Dynamics CRM

HITACHI SOLUTIONS HELPS INSURE SUCCESS FOR CRM AT GLATFELTER

Anyone who thinks insurance is a dull business hasn't considered the challenges facing specialty agencies like Glatfelter Insurance Group headquartered in York, PA.

Glatfelter is one of the nation's largest privately-held insurance companies with over 500 employees and almost 25,000 policyholders. The group writes policies for everything from fire departments and 911 dispatch centers to churches, hospices and car washes.

Its underwriters have to have the imagination and skills to recognize and estimate not only the dangers facing volunteer firefighters, but also those of overexcited players who might slip and fall when jumping up to shout BINGO at the firehouse; not only the problems of fainting parishioners, but also those of members of the Boy Scouts troop who might get hurt while roughhousing in the church basement. As its business has grown from emergency services into hospice, municipal, water districts and faith-based areas, so has Glatfelter's need for an enterprise-wide CRM system to handle its individual insurance groups. The trouble was that each business unit had its own system. Glatfelter originally started with a CRM system for their volunteer firemen's insurance program. Separate systems were added when the company added new programs.

Each system just grew on its own, according to Larissa Tosch, Glatfelter's Director of Applications. "We had five separate CRM systems that didn't talk to one another. We found that our marketing groups were handicapped because they couldn't get a single view of a customer or a broker that may have existed in multiple systems," Tosch recalls. "That certainly hurt us from a cross-selling perspective. That was one of the major pain points that made us start looking to replace all these different systems with one enterprise-wide system." So, after a decade of using multiple CRM systems Glatfelter made the switch to Microsoft Dynamics® CRM and turned to

Hitachi Solutions for guidance. According to Pallav Bhonde, a senior programmer analyst at Glatfelter, “We evaluated seven different vendors and chose Hitachi Solutions. It worked out well because they partnered with us to implement an on-premises solution.

“They came into our corporate office a couple of times and interviewed all of our sales directors. Hitachi Solutions found their needs and pain points and what type of solutions the executives were looking for. Hitachi Solutions was instrumental in every facet of the project. They had a genuine interest in learning more about our business rather than just asking us to provide a set of requirements to be implemented.”

The new system has resulted in close integration with Outlook; it integrates with Glatfelter’s data warehouse and other system feeds, and provides the ability to segregate information for the sales force based on the program, state and county of the policyholder.

Bhonde describes himself and Glatfelter managers as more than satisfied with a CRM system that is now managed “quickly and easily,” and with a Hitachi Solutions staff that continues to be “very professional, very friendly and very pleasant to work with.”

Larissa Tosch adds, “We now have one consolidated CRM solution. It’s used primarily by the sales team for prospecting and tracking activities of the insured. They love it. They get a pipeline report; they can see policy information and quote information. And the CRM is integrated with our other information systems, such as our data warehouse and our imaging system. Our sales team can see all that without leaving the CRM system.”

Tosch goes on to say, “One of the things we are looking to do is expand the system beyond sales force automation and be our single view for all customer information. This has been a win-win for all of us and I definitely see potential for using Hitachi Solutions in the future.”