

# LANSA Case Study

## PetPlan slashes training time with Visual LANSA

Hayhurst Elias Dudek Inc. (“HED”) is part of the Western Financial Group (“WES”) since 2009 and continues to use LANSA to develop and enhance the IT systems described below.

Hayhurst Elias Dudek Inc. (HED), one of Canada’s largest privately owned insurance brokers, offers specialist advice in a diverse range of commercial, group and personal lines insurance. The group’s Visual LANSA-based Life & Health and Pet Plan systems have dramatically reduced staff training time and increased productivity and customer service. LANSA Client is used for management reporting.

**Brian Hynes**, assistant vice president business systems, says, “What I like about the LANSA team is that they are not trying to sell me a product or a solution. LANSA works with me as a business decision maker to ensure that the tools meet my requirements. LANSA identified the immediate business case, but also helped me to manage where I want to be in the future.”

### A Training Challenge

In the eighties, HED purchased the source code to its original RPG-based S/36 insurance system InLib and maintained it in-house. While the system grew over the years into a highly functional and customized solution for processing insurance transactions, its green-screen interface was inadequate for data input and enquiry and was slowing down customer service staff.

“Updating and retrieving information was complex and very awkward,” says Hynes.

“We had trouble handling a growing number of enquiries to our call center. Customer service staff often had to open another iSeries session to retrieve the information the needed or to stop what they were doing altogether. Customer patience was stretched by long calls.”

“The second issue was training. It is much harder to train staff in a green-screen environment than a graphical environment. We have over 30 staff in our combined call centers, plus 116 support staff and a fairly high turnover.”

“In our old system end users also did not have the ability



Brian Hynes, assistant vice president business systems.



*“LANSA lets us maximize our 20 year investment in business logic.”*

to run their own queries or reports. For almost every query or report request a developer had to get involved, run the query and send the results to the end user. And the system did not allow well for revenue analysis by sales channel or campaign.”

“We needed a better solution,” says Hynes. “We wanted an ‘event driven’ approach that would allow a flexible line of question and answer with the client over the phone and open multiple occurrences of the same window.”

### Quick Development

“We decided to develop the Pet Plan system first. We looked at a couple of different products before we chose LANSA. I found that LANSA was the best tool for us, because it had a very quick learning curve. My team was productive in about six to eight weeks.”

“Using Visual LANSA’s graphical prototyping approach, our development team was able to get quick feedback and sign-off from the business users,” says Hynes. “It makes a very positive difference to be able to involve business users early in the process. Their feedback has been driving the project.”

“We use LANSA for all data manipulation and data retrieval. LANSA made it easy to integrate the new insurance systems with our existing iSeries-based InLib insurance back end, our billing and financial systems and with our rating tables. And using LANSA’s middleware it was also easy to do the bridge from our Windows and Sequel-based Web system, to our iSeries insurance systems.”

“LANSA allowed us to gradually redevelop our RPG-based systems and implement new systems that integrate Visual LANSA modules with our old RPG system.”

“In-house development gives us total control over our own systems. The Pet Plan and Life & Health systems are continuously evolving and being improved upon. With each modification our systems become better and stronger and easier to maintain.”

## Rapid Training

**Randy Valpy**, vice president and general manager Pet Plan, explains the difference the new Visual LANSA-based Pet Plan system makes. "In the old system staff would have to go through 14 screens in a random sequence to process a claim. Now the system allows for a natural flow of communication with the client. A claim can be processed in a few minutes. Similarly opening up a new policy has become a very efficient and streamlined process."

"The experience is more pleasant for our clients. Phone calls are shorter, saving telecommunications and call center resources." "But the biggest gain is training new employees faster. Total training time used to be three weeks, with at least one week of computer training, but it took months for people to really become familiar with the old system."

"Now because the flow of screens and prompts is so intuitive, the actual computer training is very easy and takes only three sessions of five hours each, less than a third of the time it used to take."

"We have 20 people in our call center and like most call centers with evening and weekend shifts, a high turnover of 50 percent annually. Also, the business is growing fast. Every month we train new people. So cutting back the training and getting new staff on the phone sooner to generate revenue, is very beneficial to the company."

## Better Reporting

**Kim Schroeder**, manager claims and underwriting, explains, "From a reporting point of view, we now have a far greater capability to pinpoint where our sales are coming from. We

have a number of different channels and LANSA lets us set up a flexible marketing system without the assistance of a programmer."

*"LANSA works with me as a business decision maker to ensure the tools meet my requirements."*

"Every time we work with a new partner, launch a new program or have new offer, we can assign marketing codes. Those codes can apply discounts, waive enrolment fees and serve as referral tags."

"The system is very adaptable. As a manager, I can create and maintain drop down lists for pet breeds, partnerships and other codes. And if we have a system change request our programmers can respond very quickly."

**Laura Kemp**, manager operations and marketing, and the main driving force behind the new Pet Plan system, says, "With LANSA Client we can write and run reports on demand and extract any information we could possibly want. We don't have to wait for IT to create and run reports. This has been a huge benefit because it allows us to react a lot quicker."

"On-demand printing has also helped to improve customer service. Now we print certificate of insurance and claims letters directly from LANSA and mail them immediately to the client. In the old system we had to send a request to the IT department to print certificates and claims letters in the over night batch," says Kemp.

## A 20-year Investment Maximized

Valpy says, "LANSA helps us to create a very professional appearance as a company. And has contributed to winning some of our bigger contracts. The Canadian Automobile Association, who sell car, house and travel insurance, wanted a Pet insurance partner. It was between our biggest competitor and us."

"There are a number of reasons they chose us. But I have no doubt that part of it was our new system and our ability to report back in detail on sales through their program."

"We are going to continue to redevelop our front-end systems in LANSA," adds Hynes. "The Pet Plan and Life & Health projects were delivered on schedule and Property and Casualty will follow soon."

"Our development time has dramatically been reduced, our training time has been reduced, and our efficiency has been greatly increased. We are definitely devoted to using LANSA going forward."

"LANSA allowed us to develop Windows applications using our current data structure and call existing logic to maximize our 20-year investment in business logic," concludes Hynes.



## Company and System Information

- Hayhurst Elias Dudek Inc. (HED) was formed on July 1, 1982 by the merger of Hayhurst Insurance Brokers, Lynch Elias Dudek and Associates Inc. and Harriott & Associates of Canada Ltd. HED has 150 employees across Canada. For more information visit: [www.westernfinancialgroup.ca](http://www.westernfinancialgroup.ca)
- Pet Plan is a subsidiary of HED that shares IT, HR and Accounting departments, but is otherwise self-sufficient. The Pet Plan name and logo are licensed from a U.K.-based insurance company.
- HED's IT team consists of four developers, two NT Support, one iSeries support and three Web developers.

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