ProNavigator Provides NFP Canada a Single Source of Truth, Time Savings, and Effective Staff Coaching

The Challenge

NFP previously used a note-taking program as a repository for carrier content info, and included links to take users to docs which were accessed frequently. The digital note-taking app has helpful functionality, but fell short of NFP's many requirements for a knowledge management platform. Nancy Barac CIP, RIBO, Senior Vice President Business Enablement, NFP, describes the many challenges which arose.

The Customer

NFP Canada (NFP) is a leading insurance broker, consultant, and financial services firm providing specialized business and personal insurance, group benefits, retirement and individual solutions. NFP enables client success with on-the-ground presence across North America and internationally, investments in innovative technologies, and enduring relationships with highly rated insurers, vendors and financial institutions.

Disparate Language for Updating and Searching

"We have various team leads who were responsible for populating the information and it was tough to be consistent because they each used different language. Additionally, when individual employees searched, they would also use different language and would therefore be unable to find what they needed."

Scale Became Unmanagable

Over two and a half years, NFP's Personal Risk division acquired two additional brokerages, reaching six integrations, and growing the team from 40 to 250 employees. Managing the content and maintaining consistent, up to date documentation became increasingly challenging with the growth.

Struggle to Access Information Needed

Often, employees would need information from a specific carrier, which required visiting their portal, logging in, and searching their manual.

"Each carrier has its own portal. Of course, frequently logging into different portals also requires remembering multiple passwords, which can be forgotten and require resetting. If you need something and you can't get in, it could be a real frustration. We're a large brokerage, and our staff use at least 15 different carrier portals at any given time to do their work, and that's crazy in terms of managing passwords."

Because NFP will continue growing, Ms. Barac recognized that it was vital to find a solution to these challenges.

The Solution

ProNavigator is the leading knowledge management platform for the Insurance Industry. Thousands of insurance professionals use ProNavigator daily to help their back offices store, manage, and use their documents more efficiently. The award-winning platform leverages the latest advancements in artificial intelligence and natural language understanding to instantly, automatically, and accurately retrieve mission-critical insurance information.

"My job was to find business enablement, technology or otherwise, and I started looking for solutions to what we'd been struggling with. I came across ProNavigator through Aviva, which is our largest carrier. As I evaluated ProNavigator and spoke with users, it was apparent this is insurance specific. I've seen that other tools lack the AI capability to understand the language. I can search "COC" and ProNavigator knows it's 'Course of Construction.' I haven't seen anything comparable.

Improved Efficiency Saves Time

"With the pandemic, we were all at home and couldn't easily speak to our colleagues in the office. We created a Microsoft Teams bridge dedicated to providing support. Employees could call in and there were always two people there to answer questions.

"We tracked why people called and what they struggled with. In that log, I was able to find how many times we were actually calling out to carriers, whereas, if we had the info at our fingertips, we wouldn't have to make that call. In 63 days last year, we had 1903 inquiries. 1612 were attributed to underwriting questions, product, policy wording, portal access, and internal processes. Each employee used it an average of five times per day. I low-balled the estimate at 45 seconds for the person signing into a portal and searching for content, plus 3 minutes for the team lead answering the question. Next, I multiplied across 250 users and, again used a low estimated hourly rate.

The Solution

Successful Implementation with Supportive Change Management

Working hand in hand, NFP loaded their own workflows and content into the system, while ProNavigator built out content from carriers.

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> Even accounting only for time savings in answering questions, and not factoring in the value of efficiency, we calculated that we would achieve a positive ROI with ProNavigator"
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> **Nancy Barac**

Users signed up for training, which was conducted in groups of ten to fifteen people. Staff found ProNavigator to be user friendly. To further encourage adoption and foster a positive user experience, NFP ran contests and gave out prizes, for example, asking users to find a specific item.

Detailed Reporting Improves Coaching

ProNavigator provides NFP with a variety of analytics, such as what users are viewing, searches performed, and docs opened. ProNavigator also developed custom, detailed reports.

"The analytics are so important. We can discover where we have training opportunities specific to employee needs and coach more effectively. We can see measurable improvement and that's been super helpful. We weren't able to capture this ourselves with the support bridge.

"I'm a numbers person and those are huge gains for me. These insights from ProNavigator help us figure things out and determine potential solutions. Our in-house training and development team, as well as team leads also get the reports and track those areas of opportunity. It gives us so much insight we'd never be able to capture, such as what product training we need from carriers."

A Huge Timesaver, Reduced Call Volumes to Carriers, Sped Up Wrap Time

With ProNavigator, staff at NFP are now navigating just one portal, as opposed to jumping around among fifteen different tools. They're able to reference the manuals and other content they use frequently without having to go to various different apps, log in, and potentially forget a password, requiring a reset process.

> **"ProNavigator is all a huge value.** It's a big timesaver, and gives client managers more time to spend with the client. We've sped up wrap time on calls where answers can be found versus calling the carrier, in addition to reducing the volume of calls to carriers. Our billing team has been saving time by using ProNavigator to check conditions for payments and reinstatement."

Supporting Acquisitions

When NFP acquires brokerages, they sometimes come with new carriers, which requires blending their content into current documents and workflows. The process has been much easier in ProNavigator. Acquisitions with new markets can be added quickly and made accessible to all.

Confident Things are Current

With ProNavigator, NFP has significantly reduced the time required to maintain content of their carriers and internal information Additionally, versioning of documents is no longer a concern. In NFP's SLA (Service-Level Agreement), ProNavigator is committed to entering new information in ProNavigator within one to two days, enabling NFP to be confident they're always accessing the most recent info.

"Maintaining the carrier content is a huge focus. It's off our plate and worth the fee to ProNavigator. We now have one tool, and one single source of truth, regardless of time zone. This is particularly helpful, since we have teams in Alberta that continue to provide support after Ontario has closed."

A Staple in Onboarding

The tool is a staple in onboarding. New staff watch ProNavigator training modules and have the tool at their fingertips, resulting in fewer questions for their colleague conducting onboarding. Users also appreciate the ability to "favorite" items they frequently refer back to, and not have to hunt for them again.

> "We've already seen ProNavigator is continuing to evolve the product and we've already seen some improvements, which I think is great. They're listening and open to our suggestions, which is a big factor in the partnership. "

"If you were to ask our team if they could live without it they'd exclaim, 'NO!'"