



## National Insurer Enabling Sales-to-Prospect Communication

### A Case of Fulfillment Optimization

*Sales runs on information. A cost-effective, trackable, scalable, managed communications program is essential for repeatable sales and healthy customer relationships.*

#### EXECUTIVE SUMMARY

A national provider of property/liability and auto insurance sought to control costs, increase accountability and enable more effective sales engagement for its network of 4,600 independent agents and brokers in 19 states. A solution consisting of three digital storefronts, each with unique business rules, integrating IFS's New England fulfillment center with the client's SAP platform was deployed to enable and manage consumption of inventory by employees, agents and the public.

## CHALLENGES

A number of organizational and process changes drove the need to optimize their requisition, production and fulfillment solution to enable sales and improve customer relationships. These included:

- outgrowing an email-based, in-house order fulfillment center for sales collateral and promotional items;
- the implementation of SAP as a corporate ERP system that drove changes in the way materials were requisitioned and accounted for;
- management of 13 separate vendors providing print and promotional products used in the sales process; and
- prospect and customer expectations of near real-time response times.

These challenges and the highly regulated nature of the insurance business necessitated a top-down review of the purchasing and fulfillment process for pre and post-sales communications material.

## RISKS

Despite the real benefits of consolidating purchases, implementing consistent business rules and outsourcing fulfillment, doing so was perceived as risky because:

- brokers were familiar with the current email, form-based procurement process;
- existing vendors had worked with customer for many years and were familiar with longstanding business practices;
- new process would have to integrate with the SAP punch-out requisitioning process; and
- brokers are independently owned, so user management would be challenging.

## THE IFS SOLUTION

Using its proprietary, cloud-based B2B process platform, IFS was able to integrate with the SAP punch-out protocol to enable automated requisitions for grid-based pricing on a catalog that aggregated all 13 vendors' SKUs and offered a volume-based rebate incentive. SKUs included personalized, print-on-demand items, ad-specialty items, clothing, forms and regulatory documents, and long-run branded business stationery.

The same IFS platform was configured with a regional-user approval system for broker registration and access, as well as business rules and sub-catalogs for three unique user communities: Sales, MarCom, General Public. All three ran on a single consolidated inventory catalog to minimize cost, optimize volume pricing and simplify reporting. Business rules unique to each assured clean presentation, simple ordering, the ability to tie activity to sales and ensure regulatory compliance.

Nationwide fulfillment to regional offices, sales representatives and the public was managed out of IFS's New England fulfillment center using its proprietary, real-time inventory control and fulfillment software tied into Federal Express and LTL carriers.

## RESULTS

Implementing three storefronts, a user registration system for brokers, business rules for government compliance, custom reporting SAP integration, and receiving and setting up all inventory items at IFS's New England fulfillment center took just under 5 months. With the system up and running, the results have been impressive.

**99.5+%**  
same-day fulfillment  
performance

**99.996%**  
system  
accessibility

**100%**  
accurate  
fulfillment

Real-time cost center  
accounting for all  
transactions

All stores  
managed  
by staff of  
one

Integration with  
SAP requisitioning  
system