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Real-Time Education Really Pays for Westfield

Westfield Insurance is on a mission following a successful “Boost the Use” campaign designed to encourage its 1,200 appointed independent agencies to increase automation usage and leverage the carrier’s Real Time interface offerings for quoting and inquiry transactions.

“Our agents performed over twice as many Real Time transactions in January of 2007 as they did in January of 2006, and commercial download usage increased by 96 percent,” said Brady Polansky, Westfield’s agency operations director.

Building on that success, the carrier has stepped up to the plate as a financial supporter of the industrywide Real Time/Download Campaign (www.getrealttime.org). Polansky says the carrier offers a wide variety of interface options to agents: “We like that our independent agents are independent and want choice. A good chunk of those independent agents want to begin and end their workflows in their agency management system, and Westfield, along with many other carriers, are working to make this a reality.”

Westfield writes commercial, personal and surety business in 28 states, with more than \$1.5 billion in premium. The carrier offers a range of interface capabilities for personal, commercial and commission statement download, real-time billing, claims and loss run inquiries, personal lines policy inquiry, endorsement bridge, and a new business auto, home and package bridge.

Polansky strongly believes in consistently educating agents and company personnel about the benefits of real time. A dedicated team created marketing material, such as interactive DVDs and Web conferences, which show agents step-by-step how to get organized to begin using real time. Last year, 42 percent of the carrier’s agencies participated in Web conference training, which included real-time offerings.

“This year we’re taking real time training to the next level—in addition to basic real-time training sessions, we’re developing what we consider graduate-level courses in response to agent feedback,” says Polansky.

Westfield has taken a leadership role around the industry, supporting the Real Time Campaign and speaking on agency automation topics at the local, state and national levels. “We are happy to send a representative to talk to your groups—just ask,” he says to industry organization leaders. “We’re going to do everything we can to get more agents on board, so individual agents as well as our entire industry can truly reap the benefits of using real time.”

Resource

Westfield’s experience demonstrates that when a carrier seeks a variety of ways to educate its agents about technology, usage increases. For more ideas to educate independent agents, visit the Agent’s Council for Technology (or ACT, available via www.iiaba.net) or the ACORD-User Groups Information Exchange (AUGIE, at <http://www.acordadvantage.org/augie/index.aspx>)

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