



## CASE STUDY: Risk Management Services

# Swim Association Program Renewal Process Automation



RISK MANAGEMENT SERVICES

### Swim Association Programs Agency

Tempe, AZ

[www.rmsswimminginsurance.com](http://www.rmsswimminginsurance.com)

#### Solution Components Used:

- CRM
- Service Automation
- Document Management
- Billing and Accounting
- Policy Life Cycle Management
- Reporting and Analytics



Customer  
Loyalty



Operational  
Efficiency



Employee  
Satisfaction

### Key Success Metrics

- Staff hours reduced annually - 1,500
- Renewal processing time saved annually - 1,000 hrs.
- Recaptured time applied to new business - 1,200 hrs.

### The Business Challenge

Risk Management Services (RMS), with over 35 years of service, is the leading insurance consultant to the competitive swimming community. RMS utilizes its long history of swimming related experience to help underwrite, broker, and manage highly developed insurance programs specific to the sport of swimming. RMS specializes in national swimming program insurance, alternative risk financing and client self-insured programs.

By the nature of its program business, RMS experiences concentrated periods of business service activity throughout the year. Contracted with swimming associations and their membership, renewals that contain hundreds of clients become due on the same day. Preparation and distribution of renewal notices was a manual process, and often conflicted with other business critical activities. As a result, when renewal deadlines approached, RMS staff would inevitably have to focus more heavily on these tasks, necessitating the juggling of priorities, and the extension of work hours, which combined to make it more difficult for them to provide a quality customer service experience.



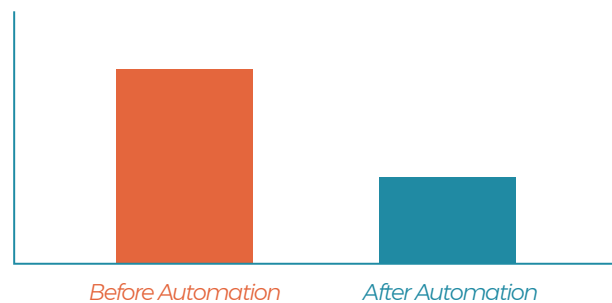
“*Nexsure Service Automation has made life in our agency much, much easier. The improved productivity, improved organization, and relief in work stress and worry, has re-energized our team. Nexsure Service Automation has already paid for itself in just this one application.*”

– **Debbie Williams**  
**Account Executive**  
Risk Management Services

## The Solution

RMS decided to implement Nexsure’s Service Automation module. This solution facilitated the replacement of their manual renewal notification process with a fully automated process. This included creating three email notification templates, and scheduling delivery on three different dates. The first was thirty days in advance of renewal, the second upon the renewal date, and the last an actual cancellation notice at the end of the 30-day grace period. The emails were created to politely inform their customers of the reason for the notice, the action required, contact information, and the consequences of inaction.

Hours and Cost Reduction



## Business Value

The implementation of Nexsure Service Automation proved to be a liberating experience. After each series of emails, RMS found that lapses in coverage were greatly reduced.

Their workload was streamlined, and significant time was saved. With a better organized and predictable renewal process, other parts of the agency benefited as well.

The new process virtually eliminated frustrated customers with last-minute renewals. Additionally, any concern for E&O exposure was mitigated.

## Critical Success Factors

Process Analysis, Testing, and Automation. Nexsure Service Automation. Consulting and Teaming with XDimensional Insurance Solutions.

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