

Wintouch CRM Case Study

Sons of Norway

Case Highlights

Challenge

- » Consolidate data from multiple independent sources in a user-friendly interface that integrates to both desktop and legacy System i applications.
- » Create an integrated self-service portal for members.

Solution

Implement Wintouch CRM Portal Version to provide employees with a 360-degree view of members and to provide members with easy self-service options.

Results

- » Improved data accuracy.
- » Increased productivity.
- » Increased member satisfaction.
- » Improved access to member information, without the need for IT to write "one-off" reports.
- » Ensured that the member services application has room to grow to meet evolving requirements.

In January of 1895, 18 immigrants from Norway who had settled in Minneapolis, Minnesota established Sons of Norway as a fraternal organization to protect its members from the financial hardships that can arise due to a death, accident or illness of a family member. The organization's scope and size has grown considerably over the years. Today, it still offers its members life and health insurance, along with other financial products, but its mandate now also includes the preservation of Norwegian heritage and culture. This latter goal is achieved through a foundation that awards grants and scholarships for that purpose and through the activities and publications of the organization and its 400 local and district lodges.



As of the end of 2007, Sons of Norway had more 69,000 members, approximately 65,000 of whom lived in the United States. At that time, the organization had \$591 billion worth of life insurance in force, spread over 18,000 insurance certificates. Maintaining close contact with so many members and policyholders, while keeping costs down, isn't easy. That's why Sons of Norway uses the Portal Version of Wintouch CRM from Touchtone Corporation.

Sons of Norway runs its primary applications on a System i (now IBM Power Systems, i edition) Model 525 server and seven standalone Intel-based servers. The organization plans to

replace the Intel-based machines with blade servers integrated into System i, a decision that gained new urgency after the recent failure of one of the independent servers.

Serving Members

As with most organizations, data—a lot of data—is the cornerstone of Sons of Norway's day-to-day operations. Information about upcoming events at the national, regional and local levels, member contact information, insurance policy and claim information and more all reside on the organization's systems. Nonetheless, until about five years ago, it was difficult to aggregate all of the information about members because the data was spread across a variety of isolated applications that had to be accessed independently.

Furthermore, some information that would be useful, such as notes about past interactions with members, was not stored electronically. For example, when a member called about an insurance issue the person who answered the call may not have been aware of past conversations with the member. This could be frustrating for a member who had to repeat information he or she had already given to another Sons of Norway employee. And it could be costly for Sons of Norway because the employee might have to redo work already done by someone else.

About five years ago Sons of Norway set out to find an application that would solve these problems and help the organization to improve the quality and efficiency of its interactions with members.

The Wintouch Choice

As part of its search, Sons of Norway issued an RFP and considered several membership application vendors. The organization saw demonstrations of all of the proposed products and analyzed their features, functions and benefits. Coincidentally, in the middle of the evaluation process Rachele Hockert, director of information technology for Sons of Norway, saw an ad for Wintouch CRM. Despite not being promoted as a membership application, Wintouch appeared to fulfill all of the RFP's requirements. Hockert investigated further and found that Wintouch would provide greater value than any of the other products under consideration.

One of the biggest advantages of Wintouch for Sons of Norway is the fact that the software runs on System i. "Most of the time you suffer hardships when applications reside on different platforms and you have to communicate back and forth between them," explained Hockert. "It's just much, much cleaner when everything is on the i. It makes my job so much easier.

"And Wintouch speaks our language. It's a DB2 database; the programs are written in RPG and Java; and those are the technologies that our programmers already know. So it was a perfect fit and it answered all of our RFP requirements."

Running Wintouch on the same platform as Sons of Norway's other applications also provided significant benefits to users. It allowed the organization to provide users with a single interface to all the membership information they required. Users no longer have to waste their time jumping from one application to another to gather data. Instead, everything is now together in one place and at their fingertips.

Self-Serve Efficiency and Quality

People move. It's a fact of life. Statistics show that, on average, about 20% of Americans move each year. Dealing with all of those address changes can be a costly burden for any organization. And, of course, moves are only one type of information update that an organization has to deal with. When an employee has to manually key in information provided by a member there is always the chance that an error will be made. The Portal Version of Wintouch solves these problems.

Members can change their own contact information by using a user name and password to log into Wintouch through the Web. The portal also allows lodge officers to update information about their own lodges without needing to involve Sons of Norway staff. At the same time, Wintouch security ensures that members can update only their own information and lodge officers can change information about only their own lodges.

This same portal also allows members to renew their membership, review available member benefits and view information from their lodge. By putting the power of information technology into the hands of members, Sons of Norway has been able to reduce the demands on its human resources, while improving member satisfaction.

360° View of Members

"We've got one person who is responsible for resolving all membership issues," said Hockert. "Yet we get rave reviews about our customer service. I'm certain that a big part of that is because of Wintouch."

Wintouch enhances customer service when responding to membership issues by quickly and easily providing Sons of Norway's staff with a 360-degree view of members. At the click of a button, Wintouch puts almost all information about a member—insurance policies in place, lodge membership, contact information, donations, past interactions with Sons of Norway, etc.—at the fingertips of an authorized customer service representative through a single screen.

This offers a number of benefits. Immediate access to all relevant information allows representatives to answer a higher percentage of questions on the first call, without the need to put members on hold or call them back later. That helps to improve member satisfaction.

In addition, the time required to resolve issues is reduced because the representative no longer has to hunt through a variety of incompatible systems to gather all of the required information. As a result, representatives can do more in less time.

Enhancing Productivity and Accuracy

System i is one of the most stable, reliable, secure and powerful business machines on the market, but its legacy applications have a reputation of being cumbersome. Users have often found navigating through these older applications to be somewhat of a drain on efficiency. This is a problem because software should help its users to be more productive and it should also make their lives easier. Wintouch does both. "All of our users say how intuitive Wintouch is to use," noted Hockert.

And Wintouch doesn't just work the way one person works, its flexibility supports the variety of work processes and styles that can be found in an organization. That's important because, for example, what an accounting employee needs to see on the screen is not the same as what a salesperson or marketing manager needs to see. In addition, different departments use different terminologies when performing their work. When using computer applications, employees need to be able to work with the terminology they know. Wintouch addresses these requirements.

"People can change their own screens to suit their requirements," explained Hockert. "For example, they can change the fields that are shown to include the information they need to do their jobs. Of course, Wintouch leaves it up to the administrator to decide whether they want to give the user that much control."

One of the features cited by Sons of Norway's Wintouch users as providing significant value was the wide variety of search options. Coupled with the ability to sort the search results, this makes it easy to find members in the system even when the user has scant information about the member. As a result, employees spend much less time hunting for member information than they did in the past.

In addition, the ability to change or add a variety of information on a single screen without, as one user put it, "having to go through 11 screens and press umpteen function keys to make updates," increases productivity and makes users' jobs easier. Furthermore, the ability to cut and paste data between Wintouch and other applications further improves productivity, while reducing the likelihood of typographical errors.

And when it comes to reducing data errors, Wintouch goes further by providing address checking functionality that determines whether addresses are entered in the format required by the post office and, if not, automatically corrects them. Wintouch provides comprehensive, sophisticated address validation functionality that fulfills the CASS certification requirements that must be met in order to qualify for United States Postal Service bulk mailing rates.

Wintouch eliminates considerable manual processing by integrating seamlessly with Sons of Norway's email application, Lotus Notes, allowing one-touch emailing directly from Wintouch. (Wintouch also integrates with Thunderbird and Microsoft Outlook.)

The organization has set up a variety of letter templates that, for example, thank members who donate to the Sons of Norway Foundation. A different thank you letter is required for each type of donation that members can make. With the correct letter template selected, Wintouch automatically fills in the donor information, eliminating the manual effort that was required in the past.

Sons of Norway also appreciates Wintouch's workflow capabilities. Users can easily enter activities, pass them to the responsible people and track the activities' progress. At each step on the way to completion users can enter notes about what was done or about conversations with members. Thus, activities no longer have a chance to "fall through the cracks."

Touchtone Support

Being in the business of delivering service to members, Sons of Norway is probably more sensitive than most companies to the quality of the support provided by its suppliers. Not surprisingly, the organization expects to receive the same high level of service that it provides to its members. Touchtone delivers.

"Their customer service is absolutely incredible!" proclaimed Hockert. Citing an example, she said, "We had migrated to a new version of Wintouch one time. We did the upgrade on a Friday. On Saturday I was out on my boat and I got a call from Reza (president of Touchtone) on my cell phone. He looked at the membership portal on our Web site and said, 'I think we may have an issue.' It's pretty incredible to have a vendor call you on a Saturday to address an issue that he found on his own initiative."

On an ongoing basis, "They've resolved everything that I've ever called about," said Hockert. "They're always right there and answer everything. They listen to my ideas for new features and functions; and I'm surprised about how much is added in every new release."

Hockert also appreciated Touchtone's support during the original implementation process, which she found to be a very easy process. Hockert credits the success of the Wintouch implementation project and the optimization of the benefits that Sons of Norway has received from the solution to extensive upfront analysis and planning. Touchtone provided considerable assistance with that.

"Touchtone was great at getting me to analyze processes that we were using that maybe didn't make sense anymore," said Hockert. Offering advice to prospective Wintouch customers, she suggested, "Spend time with Touchtone when they want to talk with you about your business. They really have an amazing understanding of people's businesses."

Future Ready

As much as Sons of Norway is already benefiting from Wintouch, the organization is still not employing all of the solution's features and functions. "Wintouch has delivered everything it promised—and more" stated Hockert. "There are still a lot of things in Wintouch that I can't wait to implement. With some solutions, you get them and you immediately max them out with your needs. With Wintouch I always see so many more possibilities for things we can do. And Touchtone keeps enhancing it all the time. I really like being able to grow into a solution."

About Touchtone Corporation

Founded in 1991, privately held Touchtone, an IBM Premier Business Partner, is located in Orange County, California. Touchtone's experience with CRM on IBM midrange computing platforms dates back to 1993, when the company launched Wintouch CRM, an RPG-based CRM solution. In 1995 Touchtone enhanced the flexibility, portability and usability of the Wintouch user interface by giving it a Java-based front-end. Since then, the company has continued to invest significantly in Wintouch research and development. For further information about Wintouch CRM or Touchtone Corporation, call (714) 755-2810 or visit www.TouchtoneCorp.com.

