



PEOPLE, PROCESSES & SCHEDULES...OPTIMIZED.

Global Insurance Giant Keeps Benefits Enrollment Operations Rolling with Resource Scheduler



Background

One of the global leaders in the financial services and insurance industry, this company has nearly 50,000 employees, serves approximately 12 million individuals in the U.S. and companies and institutions with 37 million employees and members.

Their Enrollment Operations and Services (EO&S) group is part of the company's Institutional Benefits department. Within EO&S there are 30 to 40 enrollment managers who are responsible for coordinating employee group and voluntary benefits enrollment events at customer sites nationwide. To assist with running hundreds of events throughout the year, enrollment managers depend on a network of 1500 independent, licensed insurance agents whose training and expertise qualify them to ably represent the company at customer locations.

Challenge





Enrollment managers were having a difficult time coordinating activities with its 1500 independent insurance agents. Although the names and addresses of agents were stored in a cluster of databases, they did not contain any real-time information, such as agent availability, and were updated only periodically. To keep agent information conveniently available, enrollment managers used manual methods, such as static lists on PCs, rolodex files or manila folders. With no online means of booking independent agents for enrollment events, enrollment managers were forced to call agents at random and play "phone tag" to find an available agent in the right city at the right time. For time-pressed enrollment managers who juggle many responsibilities, this manual process was inefficient and frustrating.

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*Bill T.
Project Manager*



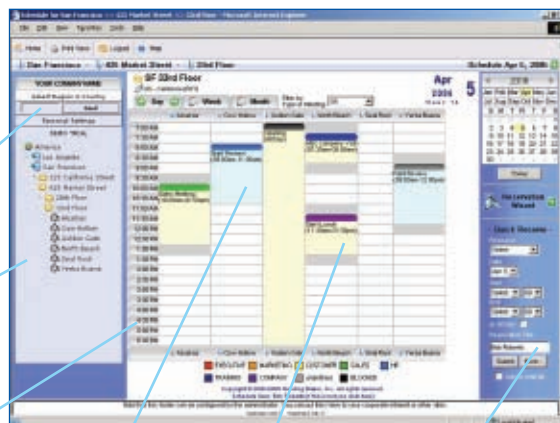


-  100% Web based
-  User Security
-  Multiple Language Support
-  Built-in Time Zone Translation

Advanced Search

Easy Navigation

Multiple
Calendar
Views



Recurring
Meetings

Multiple Resource
Bookings

User Defined
Fields

Solution

In the spring of 2001, the IT group within OE&S evaluated a number of resource scheduling products. They chose Resource Scheduler from PeopleCube because it was the only product that could be installed simply in a single installation on a centralized server. Competing products would have required individual software installations at each of all 1500 independent insurance agent locations.

"With Resource Scheduler, our enrollment managers are able to find and qualify independent agents much faster," said Bill T., project manager. "Independent agents use a Web browser to post their names and addresses, and also their schedules, into Resource Scheduler. Managers can quickly search to see which agents are licensed in a particular state, check their availability in realtime, and book them for

the customer event. We are very pleased that Resource Scheduler makes enrollment managers more productive, and the coordination of customer enrollment events more efficient."

Resource Scheduler was deployed in April 2001 on a centralized Web server, and is accessible from anywhere via a Web browser. The OE&S managers are spread across 20 locations nationwide. The IT group within OE&S was also able to customize the Resource Scheduler application to facilitate integration with an internally-developed intranet application called the Employee Enrollment System (EES). Since Resource Scheduler is so easy to customize, the integration process went very smoothly. EES maintains customer and enrollment case information in a SQL Server database, and uploads the information to Resource Scheduler. This

integration eliminates re-keying of any changes or updates to customer or enrollment information, and ensures that Resource Scheduler is up-to-date, and that enrollment managers have the latest information.

The company's IT group installed Resource Scheduler and maintains the application on a day-to-day basis. The IT group reports that the PeopleCube support team is very responsive and that they are pleased with the service they have received.