

North American Group

North American Group of Insurance Agencies, headquartered in Oklahoma City, Okla., is the nation's 75th largest independent insurance agency. With more than \$330 million in annual premiums and more than 200 colleagues, the company is Oklahoma's largest privately-held independent insurance agency. North American Group focuses solely on providing expertise and services to address the risk management need of their diverse client base.

CHALLENGE

In 2005, North American Group began an evaluation of its infrastructure and determined a need to make significant updates to support company growth.

Performance issues with the old remote connectivity solution for branch offices was costing one to two hours per week of lost productivity per employee. Affecting 22 employees directly, it amounted to 1,000 to 2,000 hours of lost productivity a year.

Specific technology pain points for the company included:

- Current technologies did not address collaboration to manage information securely and effectively. As such, legacy servers which lacked Active Directory, prevented implementations of the latest versions of other desired technologies such as Exchange Server and SharePoint, which were intended to address collaboration challenges by securely collecting and distributing confidential information to its remote offices, business partners and clients.
- Computers were operating with unique configurations and update-levels, which caused software compatibility issues and security concerns.
- North American Group's legacy Novell GroupWise system limited capacity to a 15 MB quota on user's mailboxes--once a user was over the quota they could not communicate. Also, GroupWise did not fully integrate with the company's line-of-business applications nor was it compatible with other systems the company was considering.
- Server and per user licensing was cost-prohibitive for wide-spread roll-out of mobile messaging and connectivity across legacy RIM and Citrix technologies.

Overall, North American Group realized that in order to meet aggressive business and organizational goals, it needed to invest and update its technology. While the company was ready to address the infrastructure overhaul, the project involved multiple layers requiring a variety of expertise and thorough coordination.

In addition to the needed technology updates, North American Group continued to grow internally, and with a larger workforce spread out, the company also needed to enhance communications through improved connectivity and a new corporate intranet.



“Our employees now have the opportunity to work remotely from a secure environment, meaning increased productivity and additional flexibility for our staff.”

Jeff Nickles
Technical Services Engineer,
North American Group

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MICROSOFT PRODUCTS USED

- Active Directory
- ISA Server 2004
- Microsoft Exchange Server 2003
- Microsoft SharePoint Services
- Microsoft SQL Server
- Microsoft Windows Server 2003
- Windows Mobile 5.0
- Windows Terminal Services

SOLUTION

In late 2005, North American Group asked Advanced Integrators, a Microsoft Gold Certified Partner providing technology consulting and database development services, to support the company by addressing the needed updates. The company had worked with Advanced Integrators on a previous project in 2003 and was confident in engaging them again to lead the effort. Advanced Integrators created a team to assist in the selection of a Microsoft software licensing program and the consulting and implementation services for the new technology infrastructure.

Advanced Integrators brought in Matrixforce Corporation for the infrastructure design and implementation/support services. Advanced Integrators also focused on the application development services and worked with Softmart, Microsoft Gold Certified Partner and Large Account Reseller, for the Select Agreement licensing.

Matrixforce worked with North American Group to lay the foundation for its network infrastructure using their proprietary methodology, Delta, and its four steps: Envision, Analyze, Implement, and Support. Delta has been the company's hallmark for success in over 3000 similar migrations.

First, Matrixforce migrated the organization to Microsoft Windows Server 2003 with Active Directory. The new environment allowed the company to take advantage of Group Policy Objects and Windows Update Services.

With Active Directory in place, Matrixforce moved forward with the implementation of Microsoft Exchange Server 2003 that included Direct Push Technology for Windows Mobile 5.0 devices. Through Matrixforce's help, North American Group was able to successfully transfer all of its email and calendar information from GroupWise to Exchange. With the new messaging platform, the company replaced BlackBerry devices with Windows Mobile 5.0 devices.

The new remote connectivity solution was engineered using ISA Server 2004 and Windows Terminal Services with TLS encryption. Remote offices were set up with new, faster broadband connections.

Finally, North American Group rolled out Windows SharePoint Services and Microsoft SQL Server laying the groundwork for implementation of a company intranet and client extranets which improved communications throughout the growing organization and with its customers.

RESULTS

Today, North American Group now benefits from a stable, secure and flexible environment that has increased the organization's productivity and overall business, while also saving several thousand dollars in licensing fees.

As a direct result of the updates, employees now have the ability to access vital information remotely or in a mobile environment, translating into better service to clients and business partners. The implementation of Group Policy Objects and Windows Software Update Services has saved the IT staff at North American Group countless hours in configuring and updating client systems, while also increasing the overall security of the network.

An unanticipated outcome from the project was the integration between document scanning software and Microsoft Outlook which streamlined the ability to convert and package scanned images for emailing improving productivity.

As for cost savings, North American Group estimates that it saved at least \$10,000 in licensing costs by relying solely on Windows Terminal Services for its branch office connectivity. In addition, the company eliminated the \$500 per user licensing costs for its previous mobile devices.

With the new technology infrastructure in place, North American Group was able to take the next step in leveraging IT resources to support the business—updating its custom applications to support employees, customers and vendors. To enhance customer interaction and communications, the company embraced Microsoft SharePoint to create a site that enables customers to upload large files independently. It had been a common pain point for employees and customers that working with large files was not efficient over email. As a result, customers now can share and access large files with North American Group in real time.

Another example of how upgrading the technology directly impacted business is how the company's claims division worked with the IT department to create a secure portal to communicate with vendors. The department previously generated large monthly reports that were distributed to various sources and required a full-time employee to manage the distribution. With the portal, the reports are now uploaded and vendors are automatically notified via email. This change in workflow process saves employee hours and provides more immediate access for the company's business partners.