



BlackBerry Helps Insurance Company Increase Sales Productivity

Key Challenge: Increasing Sales Productivity

Jefferson Pilot Financial's employee benefits division, referred to as Jefferson Pilot Benefit Partners, has 26 regional offices around the United States employing approximately 500 people. Over 70 of those employees, referred to as marketing representatives, promote employee benefit programs to insurance brokers. With patent-pending systems built by Jefferson Pilot Financial, these associates enjoy unique technological capabilities that allow them to effectively serve the needs of brokers.

Jefferson Pilot Financial (JPF) has built its information systems in such a way that all information entered is shared across the enterprise. "One of the primary advantages that we have in the Benefit Partners operation is we're not bound by legacy systems," says Rick Bender, Vice President of Sales Development. "Our systems can communicate with each other so that when we input data, it's entered once and automatically fed throughout all of our systems."

That is to say, information is gathered once, entered once and processed once. When employer and employee data is entered into the administration system, it is simultaneously fed to the claims system. When systems communicate in this manner, information is available to brokers, employers and employees in real time. As a result of this unique technology, Jefferson Pilot Financial has a significant competitive advantage in the markets it serves.

Jefferson Pilot Financial is always watchful for new ways to increase its competitive advantage. "When searching for solutions to help our marketing reps increase their sales productivity, I was looking for a system that would provide marketing and sales data to these reps while on the go -- a solution that would enable them to better serve the brokers and agents they work with in the field," says Bender.

The Solution: BlackBerry Wireless Email

Once Bender became aware of BlackBerry™ he immediately recognized its potential value to the sales/marketing team. He then began working on a program to provide his team wireless access to the marketing and sales data.

The feedback was loud and clear - the potential benefits were enormous.

What Bender was unaware of, however, was that elsewhere at Jefferson Pilot Financial, a simultaneous program, initiated in the Greensboro, N.C. home office, had come to the same conclusion. In fact, Mark Yetter, Jefferson Pilot Financial's Manager of Technology Engineering, had been heading up an effort to adopt BlackBerry as the company's choice for a wireless email solution.



" Our initial challenge was to find a way for our employees who do an extensive amount of travelling to be able to keep in touch with the company and their email in an easy way without having to carry a laptop around and search for a telephone jack," said Yetter. " We looked at different solutions and decided on BlackBerry based on its ability to push email out to the user. In addition, the keyboard is easier for the users to adapt to as opposed to the shorthand that competing models require."

In January and February of 2001, Jefferson Pilot Financial initiated a project with 12 pilot users. " We started with mostly senior management in the initial pilot, with a few technology officers included as well," says Yetter. " Overall, it was unanimous that this was the solution for us. It's an intuitive device with a short learning curve. The coverage is very good. BlackBerry really provides us with a lot of benefits, so it was a unanimous decision."

Jefferson Pilot Financial currently has 206 BlackBerry handhelds in the hands of its people - with 100 of those used by Benefit Partners associates.

The Benefits: Ten Times the Return on Investment

Asked to quantify the benefits to his organization, Bender conservatively estimated that the marketing representatives who use the BlackBerry handheld were saving approximately 30 minutes per day by having wireless access to their email. Multiplying that savings times the value to the company (on an hourly basis) provided an annualized productivity improvement of more than ten times the cost of the initial BlackBerry investment.

" What's impressive to me is the amount of time you can save by getting immediate mobile access to email," says Bender. For example, if you have a team of individuals who encounter a problem, immediate email access can allow the problem to be resolved in very short order, and save a lot of people a lot of time."

" What's impressive to me is the amount of time you can save by getting immediate mobile access to email. "

- Rick Bender, Vice President of Sales Development

There are other benefits as well. Mark Yetter cites two: push technology and BlackBerry's intuitive character.

" You can take your laptop with you, but until you hook in and receive what's been sent to you and transmit what you want to send back, you're really out of touch," says Yetter. " So the push technology is really the big difference in why we chose BlackBerry and why it's so important for our field force. Without that push technology, they simply would not have the same competitive advantage level."

Rick Bender amplifies Yetter's second point. " A field force has limited time and interest in learning to use a stylus that's required with a PDA. The intuitive nature of the miniature keyboard on the BlackBerry handheld was very important in our selection of BlackBerry for our people."

In regards to the implementation of BlackBerry, " setup was pretty painless," says Yetter. " It took approximately two days from start to finish."

" Wireless email was a huge benefit for us, but when the wireless synchronization of the calendar took place, from a home office employee's perspective that was a dramatic breakthrough in terms of the usability of BlackBerry ," says Rick Bender.

Since its implementation, BlackBerry has been a terrific success at Jefferson Pilot Financial. Yetter and his team are looking to extend the technology to Jefferson Pilot Financial's life agents in hopes that the results will parallel those seen in the Benefit Partners division.

" BlackBerry has been a very timely and very capable tool," says Bender. " It helps us leverage the technology that we've built internally, positioning us to continually improve service to our customers."

In Review: BlackBerry Provides Timely Access to Information

Business Situation

Jefferson Pilot Financial Partners see a need to increase sales productivity by being more responsive to brokers. At the same time, Jefferson Pilot Financial's home office seeks a means of improving executives' access to email.

Solution

Jefferson Pilot Financial implemented the BlackBerry Enterprise Server and over 200 BlackBerry handhelds, providing their executives and Benefit Partner marketing representatives with wireless email connectivity while on the go. BlackBerry also provides a variety of other advantages:

Push technology

Email arrives at your handheld as it arrives at your desktop. No dialing-in, no initiating connections, no effort required.

IT friendly

BlackBerry supplies powerful server software that integrates with your existing email system. It offers your IT team the benefits of centralized administration and support and allows your company's information systems to run smoothly.

Single mailbox integration

Seamless integration with your existing corporate email account, providing a wireless extension of your regular email mailbox.

Easy-to-use

Every BlackBerry handheld has an optimized keyboard, thumb-operated trackwheel, easy-to-read backlit screen, intuitive menu-driven interface and integrated software applications. If you can use email, you can use BlackBerry.



Benefits

BlackBerry has provided Jefferson Pilot Financial with productivity improvements worth ten times the cost of the BlackBerry solution. The results:

Decreased downtime

Jefferson Pilot Financial's employees can take care of business whether they are in the field meeting with a broker, in a cab or even at the airport.

Compelling return on investment

The value returned by BlackBerry in responsiveness, productivity and direct cost savings can be nearly immediate. In fact, according to a study by Ipsos-Reid, typical BlackBerry users report they can convert downtime into productive time by having greater access to their email.

Competitive advantage.

Marketing representatives and executives have greater access to current information, and can respond quicker and make decisions faster - so they keep ahead of their customers' needs, and the competition.