

## Customer Profile: Island Insurance

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**Island Insurance adopted Integrify to provide 100% visibility into processes, making audits as smooth as an Island Breeze**

Founded in 1939 by legendary Hawaii businessman, Masayuki Tokioka, Island Insurance Company, Limited has grown to become Hawaii's largest locally owned and managed property and casualty insurance company. It offers a full range of personal and commercial insurance coverages and has earned an "A" (Excellent) financial strength rating from A.M. Best and "A" (Strong) from Fitch Ratings, two of the world's oldest and most authoritative insurance company financial ratings organizations.

Chief Information Officer Jeff Fabry, a veteran of the technology and insurance industries, is responsible for managing all IT resources. Guided by Island's corporate mission of providing superior quality service, Jeff's focus is to improve ease of doing business for its partner agents and employees in the headquarter offices.

As a company in a regulated industry, Island Insurance has rigorous audit and compliance requirements and has implemented an approval management system within IT for tracking and managing all the company's data-access and IT requests.

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



## **The Challenge**

In March 2007, Jeff Fabry, CIO at Island Insurance recognized that his company and his industry had such stringent standards for information handling and tracking that manual processes were putting the company at risk. According to Fabry, "Every year it gets more intense - privacy, PCI, identify theft. There is a greater and greater need for following standardized policies and procedures." Being in the insurance industry, Island Insurance was externally audited every year. During the audit process Jeff came to believe that Island needed to improve:

- The processes and procedures in place for granting access to resources
- The level of control exercised over who had access to sensitive customer data
- The level of visibility and instant access to records of their IT transactions

## **The Evaluation**

Jeff Fabry began looking for a process management solution by searching on the web for packaged solutions. Although Jeff was initially seeking software that would help the IT department with its own needs for audit and reporting, he was looking for software flexible enough so that if successful in IT, it could be rolled out to other functional business units.

Says Fabry, "I knew I wanted a request management system, and it was important to have an automated workflow. We were moving from manual processes to automated processes, and I wanted to find a product where I could develop the process and the workflow from within the product itself. Almost immediately, Integrify looked different from all the other competitors. When I first started looking, I saw business process tools that were incredibly broad in nature. Although they were marketed as "solutions", really what other packages were offering was a workflow tool with nothing behind it. What really drove me towards Integrify was the engine behind the top layer. We have a number of different requests that we want to automate, and with Integrify it is easy to automate those processes in the first place, but then we can re-use whole processes or bits of processes down the road when we expand our usage."

In September 2007 Island Insurance selected Integrify 4.5 as their workflow and approval process solution.

## **Activation Summary**

Island Insurance purchased Integrify in September 2007 and went live on January 1, 2008, just three months after bringing the software in-house.

Island Insurance implemented Integrify as an on-site concurrent user license and launched with two processes, datacenter requests and network access requests.

## **The Integrify Solution**

It was a key goal for Island Insurance to be able to define their processes within the tool and then iterate upon the automated processes to gain productivity and workflow benefits. According to Fabry, "It started with audit and compliance. The audit committee is always looking at the quality of documentation and the level of controls that are in place. We realized we wanted to improve the processes and procedures we had in place particularly for those associated with access to sensitive information, for example, request for network access, and IT sources."

Integrify provides a visual flow in real-time when processes are being defined so that process administrators can de-bug their processes as they are creating them. This allowed Island Insurance to take their first two months with the product to build out process automation from the ground up, knowing they could adjust their process until it matched their workflow and maximized efficiency. Beyond creating new processes, Integrify stands out among BPM vendors in its support for modifying or copying processes once they are defined. Remarks Jeff Fabry, "It's my job as CIO to use the tools and make sure they provide value. The whole purpose of adopting Integrify is to be able to get a request management system in place and be able to use it for all the requests that we built the workflows on."

***Integrify is working as anticipated because I passed my last audit. I needed documentation on the requests we fulfilled, which the systems provides. Instead of dedicating valuable man-hours, I ran a quick Integrify report which took 3 minutes.***

Fabry can see for himself how well the adoption is going. "A lot of the approval processes come through me and after going live on January 1 for a fresh audit year, we use it on almost a daily basis. We have the first two processes, Datacenter Access and Network Access ingrained in the way we do things. While Datacenter Access requests are more complex, they don't happen that often. Network Change requests, which include any change that happens in our environment, as well as Software Purchase requests happen quite frequently." Within IT, Island Insurance plans to automate Username requests and Password Change requests next.

Right now, Island Insurance has concurrent licenses for only a subset of the company's 200 employees. After having achieved success in IT, it plans to target human resources, new employee requests, termination requests, and expense authorization requests, as well as insurance authorizations and new agency requests which are fairly complicated requests and touch many departments.

Using Integrify, Fabry says, "I have to go through the audit committee every 3 months and in the past we had to provide paper documentation and gather requests from multiple sources. Now we just run a report out of Integrify which takes a few minutes and say this is what it happened last quarter."

## **ROI**

Right now, the biggest return Island Insurance is experiencing is during their quarterly audits. The preparation and reporting that used to take valuable manpower and manual preparation is now executed in under three minutes.

According to Fabry, the IT department has always been fairly efficient in their operations and by introducing Integrify, it has helped them streamline and report on their work. However, there are greater savings to be introduced in additional departments.

## **Conclusion**

Island Insurance is representative of any small company in a heavily regulated industry. As regulations and audit stringency grew too great, they recognized that automated request management was the best way to help the company pass their regular audits and comply with their industry standards. Less than a year after making the decision to automate their processes with Integrify, Island Insurance IT is meeting their audit needs, getting the visibility they need into their IT operations and planning to expand their process automation along business and strategic lines within the company.



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