



# Peter M. Bakker Agency

## New England Agency Simplifies Its Workflow with IVANS E-Commerce Server

### Challenge

Peter M. Bakker Agency was working with a web-based proprietary system to perform download with one of its carriers. As a result, agents were required to go outside of their standard workflow for daily download with this carrier, and if there was an issue in retrieving and/or processing data, they had to work directly with the carrier to resolve it. Because Peter Bakker Agency performs download with over 20 carriers and has 35 licensed agents and seven affiliate offices, streamlining their workflow was essential.

### Solution

Recognizing the need to make it easier for agents to process business, the carrier decided to migrate its agents from the proprietary system to IVANS E-Commerce Server (ECS). The Peter Bakker Agency was one of the first agencies to migrate, and its agents saw significant time savings immediately.

With IVANS ECS, the agency was now able to use a standard workflow supported by other carriers the agency already worked with, eliminating the

need to re-key data for transactions. And, from the carrier's perspective, the insurer does not have to allocate resources to manage agent phone calls and handle technical issues that may arise. Additionally, both Peter Bakker Agency and the carrier now have access to web-based management tools for administrative tasks and online inquiries, which make it easier to do business with one another.

IVANS ECS uses secure, high-speed broadband access for retrieving files and is supported by over 30 agency management systems. This solution works in tandem with IVANS Transfer Manager™ to create a platform that uses full, end-to-end data compression to lower IP charges, while facilitating communications with multiple agency systems – eliminating one-to-many or many-to-one file transfer problems.

Ann Marie Gilbert, director of IT at Peter M. Bakker Agency said, "I am very reliant of IVANS each day, not only for policy downloads, but also for claims download and my monthly direct bill



### Customer Need:

Migrating the agency from a carrier's proprietary download system to a new, faster system in a timely fashion and without disruption to the agency's workflow.

### IVANS Solution:

Peter M. Bakker Agency implemented IVANS E-Commerce Server (ECS), a secure data storage and retrieval solution for electronic mailboxing that allows its agents to download carrier information via a high-speed broadband connection.

With IVANS, agents have the ability to use one standard workflow and network connection when performing personal and commercial downloads instead of managing multiple workflows and connections.

### Key Benefits:

- Significant time saved by eliminating the re-keying of data which, in turn, reduces the agency's processing time and opportunity for errors.
- Large reduction in the number of direct bill entries required by Peter Bakker's accounting department to track and reconcile their commission payments.
- Claims download automatically updates claim information from the carrier system to the agency, so its agents can easily track the full lifecycle of an insurance claim from their policy holders.



commission downloads. With IVANS ECS, I do not have to worry about missing data or making calls to the carrier. During the migration, we did not experience any disruption and the migration went very smoothly. With IVANS Transfer Manager, our agents no longer have to go to an outside Internet source, so they can focus more time on their customers.”

## Results

Peter Bakker’s agents are saving approximately 4-5 hours of time each week in performing download via IVANS single touchpoint solution versus the manual, unique carrier workflow they had to follow previously. Their error and omission rate has greatly decreased through the elimination of re-keying data, and by reducing their processing time, they are now able to respond to customer inquiries immediately instead of contacting the carrier first.

All of these benefits have enabled Peter Bakker’s agents to focus on selling new business and better managing existing customer data. Gilbert added, “I am glad to be with IVANS. Their staff is great to work with, and they have helped us make a lot of system enhancements. The key benefit of IVANS is the ease of use it creates between us and the carrier, and the peace of mind we have from using a proven industry solution that is fully supported by a knowledgeable staff.”

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– **Ann Marie Gilbert**  
director of information technology  
Peter M. Bakker Agency

## About Peter M. Bakker Agency:

The Peter M. Bakker Agency, Inc. was established in 1974 to provide insurance products for both personal and business clients. In 1976 the Agency acquired George B. Fisher Co, the first insurance agency to be incorporated in New England in 1872.

Headquartered in Avon, CT, Peter M. Bakker Agency has grown to over 40 insurance professionals serving thousands of personal, financial services, commercial and employee benefits clients.

Insurance companies that the Agency represents include: AIG, Atlantic Mutual, Bisys, Chubb, Drive Insurance from Progressive, Fireman’s Fund, GNY, Hingham Mutual, National Grange Mutual Insurance Co., NLC Insurance Companies, One Beacon Insurance, Patrons Mutual Insurance, Plymouth Rock, Peerless Insurance, Quincy Mutual, Safeco, Selective, St. Paul Travelers, The Hartford, Utica First, Vermont Mutual and Zurich.



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