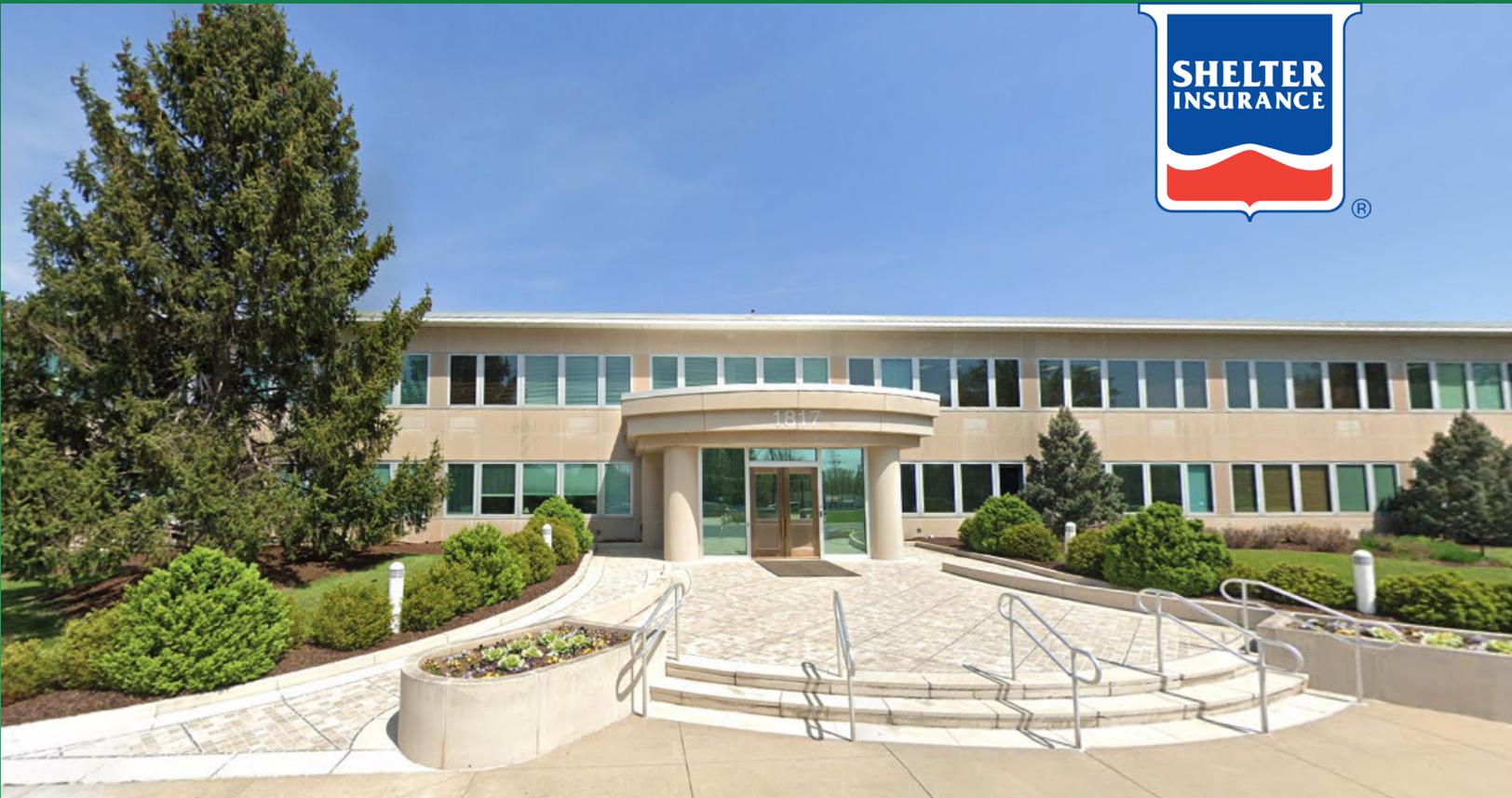




Creating Massive Time-Savings With MangoApps

How Shelter Insurance's Claims Department Improved Work Processes With Trackers & Forms




COMPANY:

Shelter Insurance Claims Department

HEADQUARTERS:

Columbia, Missouri

USERS:

850

OVERVIEW:

Shelter Insurance is a property casualty insurance company that offers auto, property, business, and life insurance across the Midwest.

Replacing An Old Resources Library

Shelter Insurance, a property casualty insurance company that offers auto and home insurance across 21 states, was looking for a tool that could replace its outdated resource repository system for the Claims Department. After evaluating a handful of alternatives, they found that MangoApps had the capabilities they needed, and much more.

“Prior to MangoApps, we had an old Lotus Notes database to house our resources library for our claims department. It was just a bunch of essential documents and information related to helping our employees do their job,” says Mark Jones, Director of Litigation and Special Investigations Unit at Shelter Insurance. “It wasn’t working very well, and so we wanted to get rid of it and replace it. We started evaluating different solutions, found MangoApps, and thought it was perfect.”

The initial goal of implementing MangoApps was to have a platform that could act as a repository of information and house important resources that employees could quickly access. However, Shelter Insurance quickly found that the breadth of features and capabilities MangoApps had to offer expanded far beyond being a one-stop shop for employee information.

“Our main focus was to have MangoApps be a resource tool that could help our employees find the information they needed to do their job, but it actually turned into something much, much bigger than that,” says Mark. “We found that MangoApps offered a lot of the things we needed, and so we expanded its use. Now we also use MangoApps for trackers, forms, projects, groups, and so much more.”

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Selecting MangoApps Over SharePoint

During the evaluation process, Shelter Insurance had considered using SharePoint to store information and files, but quickly recognized the capabilities that MangoApps had to offer were more suited for its specific needs. “There were a lot of factors that led to us selecting MangoApps over SharePoint. When we were looking at SharePoint, the cost and setup process seemed like we would have to rely quite heavily on IT resources. MangoApps seemed much easier to set up and maintain,” says Mark. “We’re in 100% of control of MangoApps, which is great. When we need something done, we do it. If we had gone with Sharepoint, we would be on somebody else’s timetable.”

Getting Started With MangoApps

After recognizing that MangoApps was a fantastic solution to replace Lotus Notes, Shelter Insurance's Claims Department shifted its focus to implementing the platform. "It was me and one other attorney that had the task of implementing MangoApps," says Mark. "We're not tech people, but frankly, MangoApps is so easy to figure out that we were able to start using it immediately. From a technical standpoint, it was very user-friendly."

With an easy-to-configure platform, Shelter Insurance is able to delegate the creation and administration of each department to non-technical people within the group. "We've kind of given the reins to each of our department groups to do their own thing on their page, and that's worked out pretty well for us. They're all using it to collaborate and store information that's specific to them," continues Mark.

"When I first saw MangoApps, it reminded me a lot of Facebook, a place that we could utilize for our team to communicate and collaborate," adds Lionel Clark, Claims Director at Shelter Insurance. "We use MangoApps as a one-stop shop for all of our materials that we use on a day-to-day basis. It makes everything easy to find so that we don't have to dig deep into search or libraries to find things."

“We talked to all the branches, and showed them how easy it was to create their pages, trained them on how to use it, how to reinforce it, and keep sending people within the branch back to it.”

- Alexi Mueller, Claims Manager



Assigning Each Branch A Group

One key feature of MangoApps that the Claims Department has taken advantage of is the ability

to separate its branches into groups. By doing this, they can ensure that communication and collaboration remain relevant and that group pages are tailored to the specific needs of each branch.

"We use groups a lot, every branch has a group, and every department has a group," says Alexi. "These groups are supported and customized by that branch/department. It's really fantastic because it can showcase the exact needs of what that department might need, and that makes it really easy for employees to find what they're looking for."

"Each branch has its own page. As you can see, if I'm not used to working claims in Kentucky, then I can go and get the information I need to keep going," adds Lionel. "We didn't have anything like that before MangoApps. We had to search through folders to try and locate something, but with MangoApps, we can just access a certain page and pull up the information, which makes it a lot easier to share information and grow."

Saving Time & Improving Efficiency With Trackers

Shelter Insurance's Claims Department took advantage of MangoApps' trackers features to dramatically decrease the amount of time spent updating and maintaining spreadsheets. "Our department saves a significant amount of time using trackers," says Mark. "Before, we probably had 18 to 25 individual Excel spreadsheets out there that we had to manually put together and update, which was extremely time-consuming and inconvenient."

"Let me give you an example of how we use trackers. During the holidays, our branch offices are closed. However, people still have claims that they need help with," continues Mark. "What we did before MangoApps was have people volunteer to be available to take a call and help our customers when a claim comes in, and this was done through Excel spreadsheets. We had a different spreadsheet to maintain for each branch, and we have 18 branches, so you can kind of guess how that went."

“With MangoApps, we can use a tracker for people to volunteer and put their name in, and the holiday they want to volunteer for. It’s great for visibility because our directors can easily go into the tracker at any time and see who is available. It keeps everything in one place and helps us stay organized. The trackers have been a real benefit to us.”

“Within my role, I spend a good chunk of time looking at reports, and so what I use MangoApps for is to look at the trackers and see the different financial information that comes through,” adds Lionel. “I can see how many payments are issued in a day and other things that pertain to my job. It’s excellent. The trackers are very easy to use, and what’s important to me is that we can download it into an Excel format. So if we do need to send them to a vendor, we can get it into Excel form and send them the information on the trackers that way.”

“And because the trackers are a live document, any changes or additions that are made to the tracker, I can see in real-time,” continues Lionel. “That really helps us justify the dollar amounts that are being inputted into the trackers and allows people to explain what is being changed within the tracker. All in all, the tracker is a great way for me to oversee the things that I need to see that pertain to my job.”

Creating Better Work Processes With Forms

The Claims Department at Shelter Insurance was able to leverage MangoApps’ Forms functionality to expedite work processes in unique ways. One such way is by using forms to keep track of claims information and ensure that claim requests are handled in order. “Before MangoApps, it was very sporadic and all across the board,” says Alexi. “Now, we can just simply feed claims into the forms, and then we can track them and do them in order. It’s been really great for keeping everybody across the company consistent.”

They were also able to improve the user provisioning process by leveraging MangoApps forms to expedite information requests and eliminate back-and-forth

emails. “In our previous process, our claim system would have a system admin create accounts for new adjusters through email,” says Lionel. “So you’d have to fill out a template, send it through email, and wait for them to get added to the system. It was a very lengthy and delayed process.

“MangoApps helped us create a whole process, a workflow on how to do work tasks much more effectively and consistently. So now we’re all doing it the same way.”

- Alexi Mueller, Claims Manager



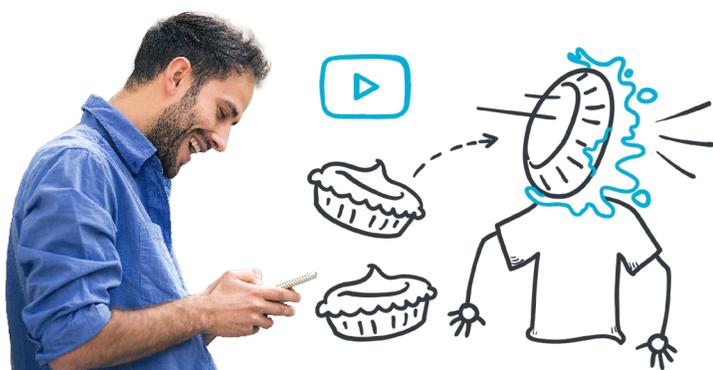
What we found with MangoApps is that the adjusters could just fill out a form with the required information, and that account would be created immediately. We saw a very quick turnaround with the new process.”

Transforming Top-Down Communication

The Claims Department at Shelter Insurance has also been able to transform the way its employees communicate and collaborate with MangoApps. “I use MangoApps to communicate with our teams. I think that’s the biggest bang for our buck with MangoApps. It’s a great way for us to communicate with each other without bombarding people with emails,” says Lionel. “Without MangoApps, I’d be getting a hundred emails a day, and so important company information was getting lost or ignored. By using MangoApps, we can communicate with our teams more effectively, and I think it helps create that transparency that a lot of us need when it comes to building a culture.”

Shelter Insurance’s Claims Department took advantage of MangoApps’ Posts feature to revamp the way that leadership distributes information to its employees. Communication is much more effective, and information is no longer lost in email, as employees

receive messages that are relevant to them. “I really like MangoApps’ posts feature a lot. It’s easy to engage with employees and make sure that they see the posts you send out, whether I’m making announcements across the department or communicating with specific teams,” continues Lionel. “We actually did a competition here that I ended up losing, and so I had to get three pies in the face. That video was recorded and posted on MangoApps, and now I’ve got team members coming up to me saying they saw that video, and it cracked them up. It’s things like that that can just really help the culture of your team and your department and your company.”



“Some of the templates MangoApps has for posts helps me think outside of the box a little bit,” continues Lionel. “I like to give status updates on how our branch is progressing with some of our goals, so a good way for me to do that is to create a post and share graphs with our teams. It really helps them understand where we are, what success we’ve had, and what areas we can improve on.”

Quickly Onboarding New Employees

During the peak of COVID-19, there was a lot of employee turnover within the Claims Department. This led to them needing to bring on new employees and quickly get them up to speed so they could better serve their customers. “Back when I was a branch manager, I had a team that was pretty much brand new. We had to get them trained pretty quickly so that we could service our customers,” says Lionel. “What Alexi and I did was create a lot of workflows, guidelines of our processes, screen captures, videos,

and more, and posted that all on MangoApps. It allowed us to have a place for our new employees to come in and really dig into what they needed. We created a training page for them to see all of this information and use that as a resource.”

“We had this problem where everybody was onboarding new employees differently, and we wanted to get some consistency in that,” adds Mark. “So we created an onboarding checklist that really helped smooth out that process for everybody. It’s got names, contacts, links, information, and anything else a new employee might need in one central place.”

Improving Employee Access To Resources

By transitioning to MangoApps, Shelter Insurance’s Claims Department was able to improve employee access to resources and cut down time spent searching for information with a unified search bar. “My favorite part of MangoApps is the high-quality searchability that it has. We have a bunch of information that people need access to, and with MangoApps, they can quickly go and search for what they need to find,” says Mark. “To say our old system was clunky would be a compliment. You never knew where anything was, and it made it really hard to find resources. MangoApps’ search feature is really good, and the file versioning helps us easily replace files and edit them without having to create a whole new document.”

“It saves me hours of time,” adds Alexi. “Lotus Notes was very difficult to search, and if you weren’t using the exact name of the document, you weren’t going to find it. MangoApps makes it so much easier to find what I’m looking for.”

“MangoApps saves me a couple of hours a day by being able to look through my notifications all at once, versus with email, I’d have to decide what’s needed right away and what I can read later on. It’s improved my productivity and saved me a lot of time.”

- Lionel Clark, Claims Director



Other Resources

[Great Western Bank Case Study](#)

[Pinion Case Study](#)

[Mango Intranet Data Sheet](#)

[Mango Intranet Use Cases](#)

[Why MangoApps Is The Perfect SharePoint Alternative](#)

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