

HED moves towards SOA with LANSA CRM solution



Hayhurst Elias Dudek Inc. (HED), one of the largest independently owned insurance brokers in Canada, has specialized in unique and cost-effective insurance and risk management solutions since 1982. HED uses LANSA Web services and a Visual LANSA CRM system to integrate existing LANSA and legacy RPG applications on System i with a .NET Web site as part of its move towards an SOA environment.

Brian Hynes, vice president information technology and business systems at HED, says, "Our biggest challenge is the multitude of legacy files and code. Moving to a relational database structure, using modular design techniques with reusable components and an SOA approach are the top priorities. SOA is a journey rather than a destination and we are only at the start of that journey, but significant improvements in developer and user productivity are already obvious."

Modernizing Legacy Systems

"One of the strengths and weaknesses of the System i is that it allows you to hang onto legacy code," says Hynes, who inherited RPG insurance and billing systems that still had an IBM S/36 file structure.

"The mindset before I joined the company was, "If it isn't broken, don't fix it." Although everything "worked," there were many shortcomings. Our business procedures had a lot of manual intervention and we spent a great deal of effort maintaining the legacy code. The main challenge was to modernize the legacy applications to support a more productive and integrated business environment."

After developing a new front-office solution for Petplan and Life & Health Insurance processing with LANSA, Hynes wanted to

improve on the existing CRM system and isolate and share common functions as services, rather than duplicating code.

HED had used the Goldmine CRM system for three years in a SQL Server Windows environment. "Goldmine is a good tool, but we maxed-out its capability," explains Hynes.

"Goldmine has a closed architecture, so we had to create a lot of bridges and ran into data replication and synchronization issues."

"Microsoft Outlook is our primary communication tool, but Goldmine couldn't integrate with Outlook, so we had to manually re-key information and maintain calendars and email boxes in both systems."

"In short, the old CRM solution was very restrictive and did not allow the integration needed to run our business efficiently."

In addition, Hynes' team wanted to take the opportunity, while developing a new CRM solution that would integrate with virtually all other applications, to look at their systems architecture from a holistic perspective.

As HED had already successfully developed several systems with Visual LANSA, Hynes decided to use the Visual LANSA Framework to build the CRM system and LANSA Integrator to create Web services for SOA.

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Tying Account Activities Together

HED's new LANSA-based Insurance Management System and Customer Relationship Management (IMS-CRM) system keeps track of all prospect and customer activity. The solution helps better manage HED's accounts and provides easy communication within departments. Any communication, either written or verbal, is saved as an activity for an account and IMS-CRM tightly ties together all of HED's business solutions.

HED uses LANSA Integrator SOAP Web services to interface between its System i CRM and insurance systems, its .NET/SQL Server Web site and the TotalGuard quoting engine.

Clarín Wong, the CRM project manager, says, "For example, we use a Web service to push account data into the TotalGuard quoting engine from new and updated accounts, so it is easy for our customer service reps to initiate a quote without having to re-key information."

The solution also integrates with Outlook using ActiveX controls to automatically create email and calendar entries and triggers fax messages via HED's RightFax server. The system also links a copy of sent email and faxes to the relevant account.

Users can create, change and format letters using Microsoft Word templates and LANSA functions that pull in DB2/400 data and calculated fields themselves, without any technical support and link them to an IMS-CRM account. A mass document generator lets users print, email or fax documents to a group of accounts. →

Start Date	Start Time	Priority	Subject	Activity Type	Creating User	Business Unit	External Policy Number	Event	Action
2007-05-25	6:00:00 PM	OK	Test Easy P	Call In	ABC/Calista	Commercial		Last Payment	Assignment
2007-05-25	11:00:00 AM	OK	Test	Call In	ABC/Calista	Commercial		Commercial	Plan Design
2007-05-25	11:00:00 AM	OK	Test	Assign	ABC/Calista	Commercial		Last Payment	Assignment
2007-06-01	1:00:00 AM	OK	Test	Call In	ABC/Calista	Commercial		Commercial	Plan Design
2007-06-01	6:00:00 AM	OK	Test	Call In	ABC/Calista	Commercial	261500	Commercial	Plan Design
2007-06-01	1:00:00 PM	OK	Test	Call In	ABC/Calista	Commercial		Commercial	Plan Design
2007-06-01	3:00:00 PM	OK	Test	Call In	ABC/Calista	Commercial		Commercial	Plan Design
2007-06-01	5:00:00 PM	OK	Test	Call In	ABC/Calista	Commercial		Commercial	Plan Design
2007-06-01	7:00:00 AM	OK	Test	Call In	ABC/Calista	Commercial		Commercial	Plan Design
2007-06-01	9:00:00 AM	OK	Test	Call In	ABC/Calista	Commercial		Commercial	Plan Design
2007-06-01	11:00:00 AM	OK	Test	Call In	ABC/Calista	Commercial		Commercial	Plan Design
2007-06-01	1:00:00 PM	OK	Test	Call In	ABC/Calista	Commercial		Commercial	Plan Design
2007-06-01	3:00:00 PM	OK	Test	Call In	ABC/Calista	Commercial		Commercial	Plan Design
2007-06-01	5:00:00 PM	OK	Test	Call In	ABC/Calista	Commercial		Commercial	Plan Design
2007-06-01	7:00:00 AM	OK	Test	Call In	ABC/Calista	Commercial		Commercial	Plan Design
2007-06-01	9:00:00 AM	OK	Test	Call In	ABC/Calista	Commercial		Commercial	Plan Design
2007-06-01	11:00:00 AM	OK	Test	Call In	ABC/Calista	Commercial		Commercial	Plan Design

HED's IMS-CRM system gives managers and supervisors an overview of each employee's activities for the day. Color-coding tasks by priority helps users efficiently tackle their workload.

"One of the advantages of the Visual LANSA Framework is its ability to integrate with third-party Web sites and solutions," says Wong. "For example, as addresses are vital information for an insurer, IMS-CRM integrates with address validation software."

"We also provide links to commonly used Web sites such as other insurance companies, MapQuest, Canada 411 and Marshall & Swift/BOECKH's property valuation. Our users just click on a link and go directly to the relevant page. That alone saves several minutes on each prospect," says Wong.

Integrating .NET, Office & System i

"By providing a flexible CRM solution to our users and real-time system integration, we have reduced application complexity and improved the efficiency of business procedures," says Hynes.

"Tight integration between the System i systems, Microsoft Office and our .NET based Web site helped eliminate many redundant tasks, increase productivity and improve system performance. Users save time by not having two calendars and email systems and not having to retype or copy information."

"We can build more personal one-to-one relationships with our prospects and customers because of the wealth of captured information," says Hynes. "At first contact, the workflow module automatically creates activities to ensure proper follow up all the way through the sales cycle. It also triggers tasks 120 days prior to an existing policy's expiry date, which is crucial for prospecting and to increase customer loyalty."

By capturing information centrally, HED maintains data integrity and accuracy is further improved by using Web services to share the information in real time. HED also eliminated slow response times caused by poor integration and data duplication, especially when creating a new customer account.

"Another benefit of moving the CRM system to the System i is that my team doesn't have to maintain two platforms, which frees up team resources," says Hynes.

"User training costs have decreased dramatically, as we no longer need to train



Left to right: Daniel Peng, senior System i programmer analyst, Clarin Wong, IMS-CRM project manager and Brian Hynes, VP information technology and business systems at HED.

users in multiple poorly integrated tools. The GUI interface produced by Visual LANSA Framework is based on Windows industry standards and is easy to use for new and existing employees. Users can find their own way through the systems and access the data without the constant requests for help to my development team."

"For this project, we actively worked with the user community to ensure that we understood the business. We carried out a great deal of process reengineering to improve on business procedures and make them as lean and efficient as possible."

"We have never before revamped our system to this degree. Using LANSA we achieved all this within a year," says Hynes.

Getting the Priorities Right

"During the CRM exercise we had the opportunity to make architectural design improvements," says Hynes. "We used an SOA approach and modular design techniques, trying to maximize the reusable components of the Visual LANSA Framework environment."

"We are now really looking at our systems from a holistic perspective. Our RPG and

"Visual LANSA Framework easily integrates third-party Web sites and solutions."

.NET developers are now integrated with my LANSA team and we are all moving towards an object-oriented mindset."

"The new CRM system is already used by 170 users and will become the launch pad for all our business lines. It gives us a 360 degree look at an account, the policies they hold and other products they may be interested in. Eventually, the CRM will contain all our contacts, including banks and suppliers."

"The biggest challenge we face is the multitude of RPG3, RPG4 and OCL programs, plus DB2 and System/36 data files in our legacy systems."

"We are moving to a relational corporate data model with all rules and attributes defined in the LANSA Repository. This is a massive undertaking that requires data conversion at multiple departments and levels. But by using a phased implementation, we can now truly get a handle on our corporate data model and SOA architecture," concludes Hynes. ■

COMPANY AND SYSTEM INFORMATION

- Hayhurst Elias Dudek Inc. (HED) specializes in providing unique and cost-effective insurance and risk management solutions for independent businesses. HED was formed on July 1, 1982 by the merger of Hayhurst Insurance Brokers, Lynch Elias Dudek and Associates Inc. and Harriott & Associates of Canada Ltd. HED is one of the largest independently owned insurance brokers in Canada, with over 220 employees nationwide. HED's head office is located in Winnipeg, with offices of local representatives in Toronto, Montreal, and Halifax. In Quebec HED operates under HED Courtier en Assurance Inc., a wholly owned subsidiary of HED. Petplan is a subsidiary of HED that shares IT, HR and accounting departments. The Petplan name and logo is licensed from a U.K. insurance company. For more information visit: www.hedinc.com
- HED uses an IBM System i model 520, which is shared by all subsidiaries and divisions. HED's IT team consists of eight LANSA and RPG developers, three .NET Web developers as well as two Windows and one System i support staff.