



## Group Benefits CRM Customer Solution Case Study



# First Harbor Benefits from Group Benefits CRM

### Overview

**Country or Region:** USA

**Industry:** Group Benefits Sales and Administration

### Customer Profile

First Harbor Group, LLC provides group benefit planning, sales, implementation, and administration to groups from 50 to 8,000 participants.

### Business Situation

The online customer relationship management program being used was very slow and cumbersome. Reports were tediously prepared using many spreadsheets. Issues were managed manually for 325 active group clients.

### Solution

First Harbor Group implemented Group Benefits CRM. Everyone now has instant access to all information on clients, carriers, plans, and issues.

### Benefits

- Consolidation of data
- Easy Outlook interface
- Instant reporting of key information

“We have been in the unique position of working with server, web, and subscription based client management software over the years. Group Benefits CRM gives us the option of using whichever access method works best for us. Most of us work with the Outlook client of GBCRM because it’s so easy, convenient, and familiar.”

Gary Jurney, Principal, First Harbor Group, LLC

First Harbor Group’s clients rely on its unique blend of financial experts to help plan, implement and manage competitive employee benefit programs. First Harbor grew dramatically over 10 years and developed an outstanding reputation for quality service and competitive products, but the time required to document client services and develop the spreadsheets that tracked potential business was overwhelming.

Now, with Group Benefits CRM, based on Microsoft Dynamics CRM, First Harbor’s team has instant access to plan, client, and service information that used to take hours or days to extract, enabling Account Managers and Producers to sell more and provide even better service.



*We convert your sales, marketing, and customer service processes into easy systems that work.*



“Employees feel Group Benefits CRM is a much better product. GBCRM allows them to move quickly through screens, respond to clients and input data while they are on the phone, and accomplish tasks assigned by management much faster. Employee acceptance is great.”

Rob Garic, Operations Director  
First Harbor Group, LLC

## Situation

First Harbor Group provides group benefit programs and administration to companies and school systems in Texas. First Harbor's clients depend on the expertise of the FHG staff to advise them, implement quality programs, and assist with issues as they arise. Working with hundreds of carriers and service providers, First Harbor helps clients wade through myriad benefit options and find the programs that are best for their employees and their budgets.

First Harbor's expert team had grown the company dramatically over the past 10 years, but they outgrew the tools and systems that helped them get there. They were using an online system to manage their clients and plans, but it was so slow and cumbersome that many staffers had stopped using it, reverting to paper, pencil, spreadsheets, and Outlook®. In addition, Rob Garic, Operations Director, says that many management reports had to be developed manually by gathering information from several sources and combining the data into spreadsheets that took days every week to develop. Garic commented, “With GBC, those reports are now available *any* time with a mouse click.”

## Solution

First Harbor knew it needed a better way to track client and policy information. FHG contracted with Power Time Corporation, a Microsoft Certified Partner specializing in customer relationship management (CRM). Gary Journey, David Miller, First Harbor Partners, and Rob Garic, Operations Director, worked with Susan Eckles of Power Time to analyze options including ACT! by Sage, Sales Logix, and two Microsoft CRM solutions that were already developed. After several meetings with the staff of First Harbor, Microsoft Dynamics CRM was selected, but it was determined that the predesigned solutions didn't work the way First Harbor wanted information presented.

Based on active involvement by First Harbor management, sales, customer service, and administrative support staff as well as experience developing solutions over the years for a number of other benefits providers, Power Time developed Group Benefits CRM (GBCRM). The goal for First Harbor was to ensure that the system is inclusive, works the way the business works, thinks the way the users think, and provides the coordination between



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**Group  
Benefits  
CRM**

 Microsoft  
Dynamics CRM 4.0

Microsoft

## Power Time Corporation

Power Time has been dedicated to the enhancement of their clients' profits through improvement and automation of sales and customer service processes for 21 years. With clients throughout the world, Power Time offers business sense, technical expertise, and exceptional service leading to long-term, positive relationships.

Power Time's experience in the benefits industry stems back 17 years. Additionally, the Power Time's lead GBCRM consultant, Susan Eckles, has prior personal experience in the field through 18 years in HR Management.

For more information about Power Time Corporation, call 713-995-8455, 800-780-0199, or visit the Web site at:

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

For more information about First Harbor Group, LLC, call 713-984-6310 or visit the Web site at:

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

support staff that First Harbor clients expect.

Ease of use was vital to First Harbor, and embedding Group Benefits CRM right inside Outlook was the perfect solution. Being able to access Group Benefits from any computer with internet access has been great for users who are on the road.

## Benefits

### Consolidation of Data

The most important benefit to First Harbor of switching to Group Benefits CRM is that all of the key information needed by anyone on their team is now in one logically-organized place. Any First Harbor staffer can see at a glance the renewal status of a policy, a client's current policy detail and complete history, any open issues, results of marketing campaigns, and status of all prospects in the sales process.

### Easy Outlook Interface

Because users were all "doing their own thing" in the past after giving up on systems that didn't follow the flow of their business, it was vital that the new system be intuitive and organized logically. Within a week of implementation, every member of First Harbor's management and staff was using Group Benefits CRM, all day, every day.

### Instant Reporting of Key Information

With a single click, a producer can see policies coming up for renewal any month of the year. Issues summary reports shows reports by client, product, or carrier. Every producer has an instant list of his or her clients.

Gary Jurney summarized First Harbor's experience this way, "Power Time's knowledge and expertise have allowed us to implement the ideas we have to make GBCRM work for us."

#### Power Time Provides:

- Group Benefits CRM Software
- Customization
- Data Conversion
- Installation
- Training
- Support



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