CLIENT >>>

Forrest T. Jones & Company (FTJ) is an insurance agency and administrator established in 1953 to provide insurance products and other financial services to members of associations and other affinity groups. FTJ currently provides insurance programs to more than 80 national associations and employer groups with more than 1.5 million members.

Learn more at **www.ftj.com**

> "
> I was very satisfied by how engaged, organized and helpful they were throughout the project.
>
> Dan Mills
> Director, Business Systems Support

QUICK FACTS >>>

Client Focus
Insurance

Business Location
Kansas City, Mo.

Shamrock Services + Solutions
Content services, support and upgrades

Project Focus
Enterprise-wide

SUCCESS STORY >>>

According to the most recent statistics, the average office worker gets 121 emails a day. It's easy to consign most of these to the trash folder without even thinking.

But Dan Mills, director of business systems support at Forrest T. Jones & Company (FTJ), is glad that he opened an email from Shamrock, a leading provider of content services, custom solutions, software, professional services, support and more for leading ECM, ERP and business systems.

"As soon as I opened that first email from Shamrock, every interaction I had with them was positive. It soon became clear that they knew their stuff and would be able to help us, and we haven't looked back since then," Mills said.

The first project that FTJ asked for Shamrock's assistance with was an upgrade to their Perceptive Content (formerly ImageNow)process and content management system. The IT team had initially intended for one of its system administrators to do the work, but when he was reassigned to other tasks, they needed a way to get the project done quickly and cost-effectively. Enter Shamrock's team of ECM experts.

"We wanted to stay current with the latest Perceptive Content release and engaged Shamrock to help," Mills said. "The upgrade went off without a hitch, and I was very satisfied by how engaged, organized and helpful they were throughout the project."

Lending a Helping Hand

Since this initial project, Mills and his team have extended their arrangement with Shamrock to include ongoing support of the Perceptive Content system and its integration with other applications.

"Shamrock's support of Perceptive Content is faster and more responsive than what we're able to do internally," Mills said. "When we need something done, I just tell our infrastructure team, they pass it on to Shamrock, and it gets done right and on time."

more >>

www.luckyyoufoundus.com   913.221.8383

SUCCESS STORY continued >>>

One of the challenges that companies face is vendors upselling them on software and services that might not be the best fit, or even needed at all. Mills and his colleagues are glad that Shamrock takes the opposite approach, choosing integrity over revenue.

"We were all set to start on a project that would've required 100 billable hours, but Shamrock talked us out of it because it wasn't the right path to accomplish what we wanted," Mills said. "They're acting on our behalf even when it doesn't benefit them financially. That kind of relationship is irreplaceable."

Before deploying Perceptive Content, many of FTJ's processes were manual and paper-based. Transitioning to an ECM solution has enabled the company to remove paper and transform many of these processes into automated workflows.

"Perceptive Content has changed our perspective on how we do business, making us more nimble and efficient across the board," Mills said. "To be competitive in our industry, I believe you have to have a solid core system and an ECM application to complement it. With Shamrock's help, we're going to find even better ways to use this combination going forward, which is only going to help us retain an advantage as we see the insurance market evolve in the future."

When asked what he likes best about working with Shamrock and the benefits that their broad range of content and support services, software and custom solutions provide, Mills was succinct and clear in his answer:

"Shamrock does what they say they're going to do when they say they're going to do it, and they're very thorough," he said.

NOTE: This study reflects the opinions of the individual mentioned and is not an official statement by the company mentioned.

PAIN POINTS >>>

> Need to efficiently upgrade their Perceptive Content system

> Require outside help because of staff reassignment and speedy project time frame

> Identify ongoing system support and improvements as key to success

> Understand that digital transformation could give them an advantage

RESULTS >>>

> Shamrock's experience and value proposition piqued FTJ's interest

> FTJ chose Shamrock to manage the entire upgrade project, which "went off without a hitch"

> Upgrade success led to an expansion of Shamrock's services to include support and integration

> Business processes are transformed after replacing paper-based workflow with digital automation

> They're acting on our behalf even when it doesn't benefit them financially. That kind of relationship is irreplaceable.

Dan Mills
Director, Business Systems Support