



Microsoft Surface Pro 3 Customer Solution Case Study



Liberty Mutual uses Microsoft Surface Pro 3 to boost mobile worker productivity

Customer: Liberty Mutual Insurance
Website: www.libertymutual.com
Customer size: 50,000 employees
Country or region: United States
Industry: Financial services—Insurance

Customer profile

Based in Boston, Massachusetts, Liberty Mutual Insurance Group is a diversified global insurer that provides a wide range of insurance products and services to individuals and businesses.

Business situation

Liberty Mutual wanted to better serve customers and improve the productivity of its increasingly mobile workforce—especially its sales team, who relied heavily on paper.

Solution

Liberty Mutual found the perfect device for its mobile workers: Microsoft Surface Pro 3, which offers both the small size and laptop-caliber performance that these workers need.

Benefits

- Eliminate hours of prep and follow-up time each week
- Answer customer questions instantly
- Deepen customer relationships

“With the Surface Pro 3, I can react in real time, which helps us win business and ultimately increase revenues. I’m easily saving two to three hours a week by eliminating prep and follow-up work.”

Ryan Parry, Senior Territory Manager, Safeco, a division of Liberty Mutual

Liberty Mutual Insurance Group pressure-tested many mobile devices for its on-the-go sales professionals before finding a winner: the Microsoft Surface Pro 3. It has purchased 1,000 thus far, and many salespeople use Surface as their only device for instant access to information during sales calls, to reduce prep and follow-up work, and to drive new business. The Surface Pro 3 fits seamlessly into the company’s Windows-based landscape, which simplifies software deployment and device management while enhancing security.

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Not long ago, Monday mornings found Ryan Parry hunkered down with laptop and printer preparing for his week's sales calls. Parry, Senior Territory Manager for insurance provider Safeco, a division of Liberty Mutual, would pull together and print all the reports, presentations, and marketing materials he would need to visit with Safeco insurance agents. He carefully filed all this paper in a box in the backseat of his car, and during meetings he handed out hard copies to everyone in the room. If someone had a question Parry couldn't answer immediately, he scribbled down a note and had to wait to get back to the agent until later that day or week.

“Problem was, delays could turn into lost business,” Parry says. “If I can't get back to agents right away, they'll place their orders with another carrier.”

Seeking better agent engagement

Why, might you ask, didn't Parry and his colleagues simply take their laptops with them to sales calls rather than printing out all that paper? Because they were too heavy, bulky, and slow. “The laptop was a barrier between my agents and me,” Parry says. “It took forever to get fired up and on the company network. It was bad for agent engagement: making eye contact and creating a dialog.” So Parry and most of the other Safeco sales team members left their laptops at home.

Mark Cressey, Senior Vice President and General Manager of IT Hosting Services at Liberty Mutual Insurance Group, and the rest of the management team realized that the company's hardware was not ideal for mobile employees and actually hindered their productivity.

“We have a growing mobile workforce across many sectors of our business,” Cressey says. “We want to enable our employees and provide them the information they need, when they need it, wherever they are. But we've learned that if you don't give employees devices that they like to use, they simply won't use them.”

Identify the perfect device

It was critical for Liberty Mutual to find a device that provided employees who regularly worked outside the office with the optimal capabilities. As one of the largest property and casualty insurers in the United States, the company has more than 50,000 employees working in approximately 900 offices around the world, so finding the appropriate mobile device was not an easy task.

Not only did Liberty Mutual need to find a mobile device that employees liked but one that would be easy to support. “As much as we want to give users more choices, we have to be mindful of the costs associated with supporting these devices,” Cressey says. “Since many computers at Liberty Mutual, from PCs to servers, already run some version of the Windows operating system, it was an obvious choice to pilot several types of Windows-based tablets.”

Also on Cressey's list of must-haves: small size, lightweight, long battery life, and powerful enough to run the mammoth spreadsheets and custom financial applications that Liberty Mutual depends on. Some employees requested non-Windows-based tablets, but those devices didn't support the company's line-of-business applications, didn't provide USB ports, and required extra deployment, management, and support work.

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Mark Cressey, Senior Vice President and General Manager of IT Hosting Services, Liberty Mutual Insurance

Cressey's team identified, purchased, and distributed several types of Windows-based tablets to dozens of sales and other mobile workers. Complaints came back about all: the battery was dead by lunch, the screen was too small, or the puny processor choked on the company's large spreadsheets.

When Microsoft announced the Microsoft Surface Pro, Cressey decided to participate in the early adopter program. “When the Surface Pro 3 came out, we knew we had a winner,” Cressey says. “It had the right chipset to power our applications, started up fast, and had a nice-size screen. The battery lasted all day, and the digital pen worked great. It delivered the power of a PC with the convenience of a tablet.”

As soon as the Surface Pro 3 was available, Cressey purchased 1,000 devices and distributed them to sales professionals, executives, and home-based workers. Now he has added it to the corporate computer catalog at Liberty Mutual and expects to receive another 4,000 employee requests by the end of 2015.

Deepen relationships, drive new sales

What happened to Parry and all his paper? “When the IT staff handed me a Surface Pro 3, I immediately noticed the difference between it and the other tablets I had tested,” Parry says. “It was as fast as a laptop; I had no problem working on multiple large spreadsheets at once. I got on the network quickly, and the battery life was amazing—I could work all day and into the night without a recharge.” This translates into his actually taking the device with him on sales calls.

“With the Surface Pro 3, I can react in real time, which helps us win business and

ultimately increase revenues,” Parry says. “I'm easily saving two to three hours a week by eliminating prep and follow-up work, and I'm not printing reams of paper and handing out paper presentations. I present on the Surface, which is far more compelling, and I have account information available electronically. This instant information access helps me deepen my relationships with agents and drives more new business.”

Adds Casie Bowers, Assistant Vice President and Region Manager at Safeco, who manages Parry, “We have no more backseats filled with paper. Prep and follow-up work has been cut almost in half because my staff members have just about everything they need on the Surface Pro 3. And if they need information they don't have on the device, they can connect to the company network and grab it or send an instant message to a colleague to find an answer.”

Insurance agents confirm the positive changes cited by Bowers and Parry. Safeco agent satisfaction scores have improved since the company began using the Surface Pro 3. Agents report that Safeco representatives are more responsive and bring more value to meetings. “The time savings achieved by using the Surface Pro 3 translate into more selling time and more time to create and deliver even better data to our agents,” Bowers says.

Bowers and Parry both love the quick-start, quick-connect capabilities of the Surface Pro 3. “If an appointment cancels, salespeople are not flustered,” Bowers says. “They can go to a coffee shop and use the Surface Pro 3 to get work done in small slices throughout the day.” Back at the office, salespeople dock their Surface Pro 3 devices to a docking station, monitor, and keyboard for a full desktop computer

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Troy Lumaye, Region Manager for Commercial Insurance Property, Liberty Mutual Insurance Group

experience. They have one computer that meets every possible need.

Speed claims processing, improve customer experience

While Liberty Mutual has prioritized Surface Pro 3 distribution for its sales team, mobile workers in other areas of the business are also seeing tremendous benefits from switching to the Surface. In its commercial property group, Liberty Mutual has seen a 36 percent speed-up in claims processing when field staff are equipped with Surface Pro 3 devices.

“We have about 130 field users who meet with customers to resolve insurance claims,” says Troy Lumaye, Region Manager for Commercial Insurance Property at Liberty Mutual. “They often wouldn’t bring their laptops on-site because of their size, so they would take notes on paper and transcribe them later, which sometimes led to mistakes and forgotten information.”

The Liberty Mutual commercial property claims adjuster team, like the Safeco sales team, tried and rejected several tablets before discovering the Surface Pro. Lumaye gave the devices to a group of claims adjusters and compared their “days to first payment” claims processing performance with that of the note takers. “The paper-based team issued payment 18.2 days after receipt of a claim, and adjusters equipped with Surface Pro 3 devices issued payments 11.6 days after—that’s an improvement of 36 percent,” Lumaye says. “This is a significant acceleration in our claims cycle time and a big step toward our goal of same-day loss payments.”

Simplify support

The Surface Pro 3 also fits neatly into the company’s existing software deployment and image management business

processes, which makes life much easier for the Liberty Mutual IT team. “I want to provide as much device choice to employees as I can, but I can’t double or triple my support staff,” says Cressey. “With the Surface Pro 3, I can add a feature-rich device to my environment that fits right into our existing image management and software distribution workflows. This creates great value without overwhelming effort and support.”

For more information

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For more information about Surface Pro 3 visit the website at:

www.microsoft.com/surface

For more information about Liberty Mutual Insurance products and services, visit the website at:

www.libertymutual.com

Software and Services

- Windows 8.1

Hardware

- Microsoft Surface Pro 3