Case Study: Maury, Donnelly & Parr Inc.

The Overview

Maury, Donnelly and Parr Inc. (MDP) is an American specialty insurance company based in Baltimore, Maryland. By providing customers solutions for nearly 150 years, MDP takes pride in being the standard when it comes to offering highly customized insurance solutions. To meet increasing customer demands, MDP needed to digitize its customer experience strategy to retain its credibility as a leading insurance firm.

The Problem

Despite being the insurance industry standard, MDP's capabilities lacked in technological delivery. A combination of manual, paper-based workflows, collaboration inefficiencies, and immature software infrastructure created urgent internal issues that needed to be addressed immediately. In order for MDP to continue to provide the best possible value for clients, processes needed to go digital.

Prior to ProcessMaker, MDP used manual processes in coordinating data between conducting analytics, presentations, and preparing briefs. This involved copying and pasting or manually re-entering data between the agency management system, Microsoft Excel, PDFs, and other tools. Human error was a common negative effect, resulting in lost time and focus among staff.

Regarding its work culture, there were barriers to change. MDP was deeply rooted in conducting business with an outdated management

A leading American specialty insurance company uses the ProcessMaker platform to enhance its proposal generation and approval processes. Today, the platform is a core application in its daily operations.

Industry
Insurance

Country
Baltimore, Maryland, USA

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suite. Software attitudes, collaboration willingness, and communication lines all needed to be reassessed with the ProcessMaker platform's integration.

The Solution

MDP offers highly customized insurance solutions to its clients, requiring a great amount of flexibility and complexity in its software. Its software architecture lacked the complexity to centralize workflows to stay competitive in the market.

MDP chose ProcessMaker to organize its internal workflows due to the platform's comprehensive power. MDP needed a workflow solution that would digitize its daily operations, while being easy-to-deploy for its non-technical personnel. ProcessMaker's intuitive interface, easy-to-build workflow processes, and customization ability allowed MDP's staff to learn the software quickly.

ProcessMaker was tasked with increasing the speed and efficiency of proposal generation, along with enhancing the broker onboarding experience. Quickening the proposal creation process allowed proposals to be approved faster, decreasing the time spent in limbo between stakeholders. Digitizing this process made the process replicable and deployable in a way that was scalable, allowing MDP to create and approve in higher volumes than previously deemed possible.

The Value Created

The ProcessMaker platform empowered MDP to reduce human errors by 75% in proposal generation. Reducing these human errors assists MDP in quality assurance, protecting the profit margins of its core business, automating processes for easier replication and deployment, and providing an easy-to-use solution to design workflows within its company.

The workflow platform also enabled MDP to minimize the time required to produce and invoice a proposal. The time required to produce proposals was reduced from 45 minutes to 7-12 minutes. This meant not

The Problem

- Outdated proposal creation processes
- Manual workflows intact
- Immature software infrastructure
- Learning curve to new workflow adoption

The Solution

- Digital production of proposals
- Automation of invoices
- Created e-signature capability
- Easier PDF creation
- Detailed, yet simple reporting

The Results

- Proposal production time reduced from 45 minutes to 7-12 minutes
- Reduced human errors by 75% in proposal generation
- Greater operational efficiency due to automation of workflows
- Software ability to process approvals, e-signatures, reporting, calculations, PDFs
- Stronger work culture and positive attitude toward technology

"It is very easy during a build to not see the forest past the trees. Once we realized that perfection on the first pass is impossible — and that striving to have all processes nailed prior to launching is paralyzing — we were a lot better in the long run."

— Paul LaVardera, Senior Vice President of Maury, Donnelly and Parr Inc.

only greater efficiency for the firm, but also had the human impacts of a more focused, satisfied customer experience that could deliver greater value in less time.

In terms of staff relations, collaboration and a positive attitude toward more communication has drastically increased over time. The flow of information between people and systems is more effective due to automation. As a result, more time is freed up for MDP to focus on completing productive work, rather than busywork, as a result of lack of technology.

As a result of implementing ProcessMaker's BPM platform, MDP was able to improve its organizational health, customer experience, employee experience, and its growth strategy. Not only were staff able to work together more collaboratively and productively, but the customer was offered more complex, customized, and holistic solutions on the business level. With everything working in unison to benefit the customer, the end effect was a strong business model that helped MDP gain a competitive edge in the market.

About MDP

Maury, Donnelly and Parr Inc. (MDP) was founded in 1875 and has operated as an agent and broker in Baltimore since its inception. MDP is one of the oldest insurance firms in the Mid-Atlantic region. Today, the organization is a diverse agency with 5 offices around the country, serving the needs of thousands of clients. The company currently holds insurance licenses in 48 states.

About ProcessMaker

ProcessMaker is low-code BPM and workflow software. ProcessMaker makes it easy for business analysts to collaborate with IT to automate complex business processes connecting people and existing company systems. Headquartered in Durham, North Carolina in the United States, ProcessMaker has a partner network spread across 35 countries on five continents. Hundreds of commercial customers, including many Fortune 100 companies, rely on ProcessMaker to digitally transform their core business processes enabling faster decision making, improved compliance, and better performance.