Insurance Trust

About Insurance Trust

Insurance Trust was founded in 1963 by the Maine Credit Union League to provide insurance solutions for credit union and their members. Since its inception, Insurance Trust has grown to provide group and individual insurance and insurance-type products to credit unions, their members and employees, individuals and businesses. Insurance Trust's commitment is to provide the best products and services for all insurance protection needs. For over 50 years, Insurance Trust has been the premier provider of insurance and loan protection products throughout the Northern New England credit union community.

The Challenge

As a current SE Essentials, SE Encrypt, and SE FileProtect client of Systems Engineering's (SE), Insurance Trust began to compare its current IT setup to the needs outlined in their Business Continuity Plan. In effect, they wanted to roll out a Disaster Recovery (DR) plan to allow their workers to stay productive if there was a facilities disaster or snow storm where employees could not come into the office. Office Manager Barbara Christy, Vice President of Operations Lynne Pomerleau, and President & CEO David Baird met to discuss their IT challenges and mutually agreed that the following objectives needed to be met:

– Employees should be securely enabled to work remotely with their BYOD devices and/or those devices supplied by Insurance Trust,

– They needed an IT network to support the DR plan,

– And, their current servers were due for a refresh.

In looking at the above objectives, the Insurance Trust team also realized that they currently had many SaaS-based (Software-as-a-Service) applications, including their accounting, document management, and insurance benefits platforms.

"It made sense for us to look for a network that would allow us to access any system or document we needed from wherever we were located," stated David Baird. "SE has gotten to know us really well and has learned how we roll, how we operate, and what makes us tick. They have always helped us to address what we need and where we need to be within today's technological world."

SE Solution

After consulting with their Systems Engineering partner, the Insurance Trust team decided they needed to migrate to a fully cloud-based environment utilizing Microsoft Office 365, including Exchange Online, SharePoint Online, and OneDrive. Due to their current SaaS-based applications and the plan to allow employees to work remotely from any device anywhere, this made perfect sense and aligned well with their business continuity and disaster recovery plans.

> "Our decision to move to Office 365 and SharePoint supported our business continuity policy. We are able to work anywhere and it doesn't matter where our servers are located. In addition, SE trained us on learning SharePoint, allowing us to build and navigate the system exactly as we outlined."
>
> Lynne Pomerleau, Vice President of Operations, Insurance Trust

The Results

With Insurance Trust's full migration to the cloud, they realized several benefits with the transition: it allowed them to buy laptops for their employees in lieu of buying servers; documents could be edited and saved real-time even if more than one individual was working on it at once; and, remote work was as seamless as working directly in the office at a desk.

"Fall is a busy time of year for us in preparing for board meetings and such. Being able to edit Microsoft PowerPoint real-time as a team was awesome. It made everything come together so easily and so seamlessly. Every change from every contributor was there in one document," explained Marketing Director, Seth McClellan.

When speaking about Insurance Trust's recent transition to the cloud, President & CEO, David Baird stated, "New people coming into our company know that our system is up to date and current. Any CEO or senior leader in any organization needs to be aware of whether or not their infrastructure is where it needs to be. We know that Systems Engineering will walk with us throughout any transition. We know we've done the right thing in getting our system up to speed."

In summary, moving to Microsoft Office 365 allowed Insurance Trust to remove much of their local IT hardware footprint. Their organization's shared files, personal files, and email now live in Office 365 instead of on a local server. As a result of having their various SaaS applications in the cloud already, this made it a seamless transition for the organization and its staff. Now, if an office disaster or emergency were to happen, employees will still be able to access their organization's files and documents without interruption or downtime.