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## Case Study - The Leavitt Group



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Randy Wilson  
IT Consultant  
The Leavitt Group

Like cash and customers, productivity is something organizations never feel they can have too much of. In a good economy, productivity is seen as a way of keeping up with demand without adding to the cost side of the ledger; in a weak or neutral economy it's a means of shoring up the bottom line in the absence of sales growth.

One area that is often a particular barrier to productivity in the insurance industry is faxing. While most communications can now be done via email, the reality of documents requiring signatures or handwritten notes means faxing is still an integral part of the insurance industry. And manual faxing by its' very nature creates productivity issues.

In many offices, faxes are still sent and received on a single fax machine connected to a dedicated phone line. When sending, users have to leave their desks, dial a phone number, feed the pages, and wait until the fax is completed. They also have to hope they don't get a busy signal, or else they'll have to do it all again. When receiving, they either have to leave their desks to check if the fax came in or wait until it is delivered by a gatekeeper. To get around these problems some larger offices have installed more sophisticated networked solutions such as fax servers, but these systems can be expensive to obtain and maintain due to frequent hardware and software upgrades. They can also be expensive to support. As a result, whether they are using fax machines or fax servers, productivity losses can be significant throughout the company



## The Customer

Founded in 1952, The Leavitt Group is one of the largest insurance brokerages in the United States. Leavitt Group affiliates are able to provide effective, sophisticated, and creative risk management and risk transfer solutions to all types of business. Each affiliated agency is a separate entity, typically owned by its' on-site manager and by Leavitt Group Enterprises, Inc. This arrangement allows the individual affiliates to share costs for core services such as advertising and information technology, improve employee benefits, maintain insurer relationships, and benefit from increased brand awareness while still maintaining their independence. The company's approximate 1,500 employees operate out of 115 offices located in the U.S., and these numbers continue to grow. Annualized premiums are nearly \$1.2 billion. The Leavitt Group is headquartered in Cedar City, Utah.

## The Challenge

"It was very important for me to find the right vendor, who was mature in this playing field and capable of delivering reliable service and support. MyFax has not only delivered with excellent service and support, but they have really given us some aggressive pricing as well. All in all, I am convinced we have gotten the best value for our money by going with MyFax."

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As The Leavitt Group has grown, the burden on various resources has grown along with it. The typical brokerage office has 10-15 staff members, although some go as high as 70. In addition, there are roughly 100 people at the headquarters location.

Faxing is an important contributor to the day-to-day operation of the business. Keeping a fax machine or a fax server running produces an unnecessary drain on both financial and IT resources. The manual processes involved in faxing also create a significant productivity burden. Both issues were showing up on Randy Wilson's radar, an IT consultant in The Leavitt Group's service division.

"One of the things we pride ourselves on in the service division is to look for ways to improve productivity and reduce costs," Wilson says. "If the bottom line is lower, we all win. After running some analysis, it became pretty obvious to a number of us in IT that the solutions we were using - fax machines and fax servers - were not ideal. Increasingly we had problems with both."

While fax machines were still the predominant technology in the company, productivity issues had caused some of the larger offices to move into fax servers. This technology allowed faxes to be delivered directly to the desktops of the agents or support staff instead of having to go through a central machine. It also allowed users to send faxes directly from the desktops so they could keep working. But while this method solved certain problems, it created new ones as well.

"First of all, the up-front hardware and software cost is expensive," says Wilson. "Then there's the cost and time involved to keep everything updated, including a client on every machine. That alone was a huge pain."

At the user end, all inbound and outbound faxes had to go through a single gatekeeper before being sent to their destinations. In effect, these offices had replaced a machine with a person, so faxes were still susceptible to delays or mishandling.



"On the back end, this technology gave IT yet another set of hardware and software that we had to monitor and maintain," Wilson says. "Hard drives would crash, and we often would have to send a technician to a remote office to replace non-functioning hardware. It was just not the ideal solution."

The other major challenge with both fax machines and fax servers was archiving. This is an ongoing need at The Leavitt Group, since fax documents often serve as proof of important transactions, including the binding of insurance coverage for clients. Given that the busiest office of the 115 sites across the country typically handles up to 20,000 faxed pages per month, archiving faxes can be a real headache. Although it would seem that the electronic format used by fax servers would make documents easier to organize, there were still many problems, including old faxes getting lost and no ability to attach electronic confirmations to the file.

As the problems continued to grow, Wilson and others in the IT department began investigating alternatives that would help increase overall productivity while reducing costs. They also wanted to find a solution that would integrate more easily and directly with the agency management software. Lastly, they wanted a system that would be highly reliable in order to relieve their own support burden.

"We run two separate agency management software platforms that are very different from each other, our IT group supports both, and MyFax has been able to integrate easily into both. No matter which platform a given agency is using, MyFax works well with it."

Randy Wilson  
IT Consultant  
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## The Solution

Years earlier, Wilson had investigated hosted fax services - sending and receiving faxes over the Internet. However, at that time, he determined that the expense would be too great. With the new challenges The Leavitt Group was facing, he decided to look into them again. He found the landscape had changed considerably, thanks to one vendor in particular -- MyFax.

"It was very important for me to find the right vendor, who was mature in this playing field and capable of delivering reliable service and support," Wilson says. "MyFax has not only delivered with excellent service and support, but they have really given us some aggressive pricing as well. All in all, I am convinced we have gotten the best value for our money by going with MyFax."

Another factor that was of great importance was customer service. Since faxing plays such a key role in The Leavitt Group's day-to-day business, Wilson wanted to be sure any problems that might come up would be handled quickly.

"I saw a review of hosted fax service providers on the Top 10 Web site, and MyFax is listed as number one in customer service," Wilson says. "My personal experience lines up directly with that. From day one their customer service has been outstanding."

The Leavitt Group's IT team has been utilizing MyFax on a rolling basis. The process normally begins with a call from Wilson to an individual location to discuss various needs they might have, what their concerns are, and whether they have a fax server solution in place. From there he explains how MyFax works and what the benefits to that office will be. Wilson says it's usually an easy "sale."

"It's particularly good when one of the independent owners has multiple locations,"



Wilson states. "We can show them how they can really cut their faxing costs, such as eliminating the need for additional fax lines at their various locations. Between that and the productivity gains they can realize the only question they usually have is how quickly can they get up and running."

For Wilson, one of the advantages of MyFax over certain competitive services is the fact that MyFax does not require an agent to be installed on every desktop. From an IT perspective, that means one less potential hole in the security infrastructure and one less application to provision and manage. All back-end management of the service is provided by MyFax, which has greatly decreased the amount of time the IT department has to spend supporting networked faxing compared to the old fax server solutions.

"We run two separate agency management software platforms that are very different from each other," he says. "Our IT group supports both, and MyFax has been able to integrate easily into both. It allows documents to be received in more than 40 different file formats, so importing faxes as well as confirmation notes into the system is a lot easier than it used to be. No matter which platform a given agency is using, MyFax works well with it."

"Overall, MyFax has been a huge success for us."

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Currently The Leavitt Group is targeting MyFax to be deployed on 750 desktops. But Wilson thinks this number will be even higher.

"The more we use it, the more our users are going to want it," he says.

## The Result

Most of the results so far have been in soft costs, such as productivity. Here the savings have been significant.

"There is less need for a gatekeeper since most faxes are sent directly to and from the individual user's desktop," Wilson states. "This eliminates the need for someone to sort through all faxes and deliver them to the appropriate person. Our agents really like that - especially because they can even send and receive faxes when they're calling on a customer or otherwise out of the office."

One hard cost Wilson has seen go down is the cost of a phone line. He estimates that the average cost for a phone line in a remote office is \$40 per month. Long distance charges used to be additional. Now there is no additional cost for long distance. Paper and toner costs have also been reduced, although he says it's more difficult to provide an exact figure there due to paper still being used for copiers and standard printing.

"Overall, MyFax has been a huge success for us," Wilson says. "You can tell by its' rapid adoption. Because we prefer all our insurance agencies to have their own autonomy, we rarely mandate changes. However, MyFax makes great sense for the majority of our locations. It's just too good to ignore."



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## About MyFax

MyFax is the fastest growing Internet fax service used by individuals, small, medium, and large businesses to send and receive faxes using existing email accounts or the web. MyFax offers services in North America and Europe, including the United Kingdom, to industries recognized among the fastest growing adopters of internet fax including finance, insurance, real estate, healthcare, transportation and government. More than 20,000 new customers subscribe to MyFax each month. Additional information is available at [www.myfax.com](http://www.myfax.com) and [www.myfax.uk.com](http://www.myfax.uk.com).

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