



## Case Study: U.S. Risk Insurance Group, Inc.



### U.S. Risk Insurance Group, Inc. is Fully Confident in Data from Microsoft Dynamics GP and in their Tribridge Relationship

**Tribridge integrates U.S. Risk's policy management system and Microsoft Dynamics GP for fast, reliable access to data**

#### BUSINESS SITUATION

The heart of U.S. Risk's operation lies within their policy management system. Since 2005, U.S. Risk has had three different policy management systems. In each one, U.S. Risk chose to integrate Microsoft Dynamics GP in their system to run their general ledger and accounts payable functions. Recently, U.S. Risk decided it needed a more reliable Microsoft Dynamics GP service firm to meet their ever growing needs. U.S. Risk needed to find a firm that had professional expertise and was reliable. "I knew of Tribridge from a past business relationship," said James. "After meeting with their team and hearing their project implementation methodology, we knew we were in good hands."

#### SOLUTION

The Tribridge team developed and deployed an implementation plan that included an upgrade to U.S. Risk's current Dynamics GP application; a new integration using eConnect to connect the policy management system with Dynamics GP; updated financial statements and budgets with FRx; and an upgrade to the MICR accounts payable check printing application. Simultaneously, U. S. Risk was implementing its latest policy management system, so timing was definitely critical. "Everything needed to come together at one time to avoid any business interruptions," said James. "I felt confident in the Tribridge team that they would be able to make this happen."

**SOLUTION:** Microsoft Dynamics® GP

#### ABOUT U.S. RISK INSURANCE GROUP, INC.

 U.S. Risk Insurance Group, Inc.

For nearly 25 years U.S. Risk Insurance Group, Inc. has offered clients national and international access to wholesale brokerage and specialty lines insurance products, claims handling and litigation management services, loss control and risk management consulting services and reinsurance brokerage products and services. Headquartered in Dallas, Texas, U.S. Risk is an independently owned and managed sales and service organization that operates in 35 locations with 400 employees throughout the United States and United Kingdom. Clients across North America rely on U.S. Risk's products and services that help insure their businesses.

We are so confident in the data that comes into Dynamics GP thanks to the integration that Tribridge wrote. We can make accurate, timely decisions based on good data.

We help our customers become more productive, profitable, competitive and secure.



**SOLUTION:** Microsoft Dynamics® GP

## RESULTS

In addition to migrating data to the most current version of Dynamics GP, Tribridge helped improve U.S. Risk's internal processes. "Tribridge set up the control functions for the integration so we can monitor how information is brought in from the policy management system on a daily basis. This ensures that if data is missing we know about it instantly instead of at the end of the month," said James. U.S. Risk now has reliable and complete data that automatically flows from the policy management system into Dynamics GP. "The integration between our PMS and Dynamics GP not only saves us time, but we have fewer keystroke errors," said James.

"Since our data is so much more accurate, it takes us just one day to close our month," said James. "That is significant. The faster we can close our month, the faster we can produce financial statements and update budgets in FRx." Having this information sooner allows U.S. Risk to analyze results and make adjustments more quickly if there is an issue. "We are able to send out financials and budget information by the 25th of the month. It used to take 10 days longer," said James.

"We have always been very good at controlling the cost side of our business," said James. "Now we are able to have better control of the revenue side. Being able to see actual numbers versus budgeted numbers for various time periods helps us understand which departments may be off their budget. We also like that we can drill down into line-item detail to see the numbers that make up the budget." Again, this level of detail allows U.S. Risk to analyze trends and make decisions that have positive impact on revenue.

"We relied on Tribridge to manage the entire project for us," said James. "We had very few problems in the implementation, which I attribute to their planning and expertise. They were on schedule, professional and reliable. I have tremendous confidence in their team and I was pleased to recommend Tribridge to our other subsidiaries to help with their implementations. Bottom line is their consultants know what they are doing."

## THE RESULTS

- › Month-end close time reduced to one day
- › Integration with policy management system reduced errors and inaccurate data
- › Notified daily if critical data is missing
- › Reduced how long it took to disseminate budget information by 10 days
- › Easily process 2,500 checks a month with MICR check encoding
- › Analyze revenue trends and make adjustments accordingly
- › Instilled confidence in data

## CONTACT TRIBRIDGE

Find out how Tribridge can help you simplify your business.

**CALL:** (877) 744-1360

**CLICK:** [success@tribridge.com](mailto:success@tribridge.com)

**VISIT:** [www.tribridge.com](http://www.tribridge.com)



Not only did Tribridge do a great job with planning and scheduling our project, but they also worked really well with our IT team. They were professional and helped move U.S. Risk forward.

We help our customers become more productive, profitable, competitive and secure.