

BUILDING A COMMUNITY OF OPERATIONAL EXCELLENCE AT THE INDEPENDENT ORDER OF FORESTERS

Foresters Case Study

The Independent Order of Foresters is not your traditional life insurance or financial services provider. Instead, Foresters is a non-profit fraternal benefit society with a rich history spanning over 140 years and serving more than three million members in the United States, Canada, and the United Kingdom. Because Foresters champions the well-being of families by providing life insurance, savings, retirement, and investment solutions, they are committed to handling their member's most sensitive information by continuously improving their operations over time. In an effort to replace century-old hard copy files and create a more efficient environment, Foresters decided to implement Mitrtech's Secretariat entity management system.

DEVELOPING STRUCTURE

For over a century, there was not a system in place to manage corporate records. With the use of spreadsheets, an access database, and minute books, records were kept as hard copy files piled up enough to justify an entire storage room. About 15 years ago, Shelley Wilson, Senior Manager of Legal Operations and Support at Foresters, was serving the company as the corporate paralegal. When asked for corporate information, she was forced to dig through thousands of records and manually search for the appropriate file. The amount of records became unmanageable resulting in an environment that bred frustration. Over time, the use of multiple tools demonstrated high levels of inefficiency, prompting Foresters to implement Mitrtech's Secretariat entity management system.

"With Secretariat, we were able to consolidate all records, current and historic, into one database, and provide access to the people that need that information. It really did enhance the level of service we were able to provide to our stakeholders; when we are asked for specific information, we are now able to generate reports and send as an email, or grant super viewer permissions to our power users. This is a great part of the solution as well — because we are able to distinguish between full and limited access users," explained Wilson.

UNLOCKING THE POWER OF EFFICIENCY

Shelley Wilson is now the system administrator of Foresters Secretariat system, and holds the keys to grant access to various users to limit permissions ensuring ultimate security of their sensitive data. Before Secretariat, Wilson noticed there were several avenues to update information, which led to duplicate entries and no ability to generate reports to leadership. At Foresters, it has become a best practice that Secretariat is the sole source of current and historical corporate data and location to input new information. This has allowed for greater depth of data, and fewer steps to generate advanced reports for stakeholders. The greatest benefit they have seen is a significant improvement in operational efficiency. "We have seen time savings mostly, but time is money," said Wilson.

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*- Shelley Wilson,
Senior Manager of Legal
Operations and Support
at Foresters*

With two system administrators for Secretariat and over a dozen user licenses, Foresters corporate legal department has become more organized, more efficient, and has developed a more dynamic team because they have been able to buy back time. Wilson added, "We are always trying to be more innovative. People are always looking for you to improve your service levels and be more efficient. That's why we sought out a solution."



ABOUT MITRATECH

Mitrates is the leading provider of fully integrated Enterprise Legal Management (ELM) solutions for global legal departments of all sizes, including almost 40% of the Fortune 500 and more than 750 organizations in all. Mitrates's offerings include the flexible, comprehensive, and trusted TeamConnect, eCounsel, and LawManager product platforms, all of which offer end-to-end matter management, e-Billing, legal hold, contracts management, entity management and GRC solutions. Mitrates clients are able to prove demonstrable value creation for their organization by automating legal workflows, improving business outcomes through actionable data and insight, increasing collaboration with external partners and reducing overall legal spend. To learn more, visit www.mitrates.com

CONTACT MITRATECH

Mitrates Holdings Inc.
5001 Plaza on the Lake
Suite 111
Austin, TX 78746
512-382-7322
www.mitrates.com
info@mitrates.com