

## Microsoft Office 365 Customer Solution Brief

### Bea's Insurance Agency

#### Fast Facts

**Customer:** Bea's Insurance Agency

**Website:** [www.beasinsurance.com](http://www.beasinsurance.com)

**Number of Employees:** 2 employees

**Country:** United States

**Industry:** Financial services—Insurance

#### Customer Profile

Bea's Insurance Agency, located in East Palestine, Ohio, offers commercial, personal auto, home, and life insurance to customers throughout Ohio and western Pennsylvania.

#### Software and Services

- Microsoft Office 365
  - Microsoft Exchange Online
  - Microsoft SharePoint Online
- Windows Phone 7

## Insurance Agency Streamlines Operations, Supports Future Growth with Online Tools

**“By using Office 365, we are getting big-business tools at a small-business expense.”**

*Jeffrey Stewart, Agent, Bea's Insurance Agency*

#### Business Needs

Bea's Insurance Agency has been serving people and commercial entities since 1999, when Bea Hromyak first opened her doors for business. Today, the business is run by agents Kerri and Jeffrey Stewart, Hromyak's daughter and son-in-law. Although the faces have changed, the commitment to personal service remains the same.

To provide that personal service, the company meets customers in person as often as possible and also ensures that a licensed agent is always in the office during business hours to respond to customer needs. This makes scheduling quite difficult. In the past, the Stewarts constantly had to check with each other before setting meetings to confirm that those meetings did not conflict with times during which the other person would be out of the office.

#### Solution

Bea's Insurance Agency now uses Microsoft Office 365, a set of web-enabled tools, to handle email messaging and the sharing of calendar and contact information. The Stewarts can see each other's schedules on their Windows Phones as well as their computers, using Microsoft Exchange Online to get updated calendar

information. The company plans to move its hosted website to Office 365 and, as it grows, use Microsoft SharePoint Online to manage and share policies and other documents among multiple agents.

#### Benefits

The Stewarts enjoy the advantages of Office 365. “As a small-business owner with a lot to do, I appreciate how Office 365 removes stress and makes technology less complicated and overwhelming,” says Kerri Stewart. Specifically, the agency has found these benefits of using Office 365:

- **Smoother communication.** Using Office 365 makes it possible for the Stewarts to interact with customers seamlessly and support the drive for personalized service.
- **Affordability.** The company spends the same amount on technology that it used to spend on just email, and it is adding shared calendars, document sharing, instant messaging, and collaboration features for those dollars.
- **Productivity.** The Stewarts can schedule meetings without worrying about conflicts or wasting time coordinating.

