

# Informer™ Case Study

## Ruhl & Ruhl Insurance Quickly & Easily Creates, Schedules & Archives Production Reports with Informer Web Reporting

### Situation

Ruhl & Ruhl needed to streamline the process of generating production reports in order to get critical information needed for monthly management meetings.

### Success

Prior to implementing Informer, reports were done as requested, not at all, or when a report writer had the time to run it. Now, users at Ruhl & Ruhl have set up and scheduled several reports to go to individual producers and management automatically.

### Challenge | Reduce Time & Resources Required to Generate Production Reports for Management

Ruhl & Ruhl Insurance offers a full selection of commercial, medical malpractice and personal insurance programs. Critical to their ongoing success is the ability to quickly and easily create production reports from their Vertafore™ Sagitta agency management system to uncover critical insights needed to make the best decisions.

"The biggest challenge was trying to compare production year to year and month to month by individual producer", says Tim Smith at Ruhl & Ruhl Insurance. "We were running several reports and then comparing them using Excel. Reports were needed monthly for management meetings and took quite a bit of time."

As a result, the reporting process was time-consuming and inefficient and the required reports were not generated when needed. "We lacked information needed to make proper management decisions", said Tim. "The reports generated were essential, but it took time that could have best been utilized elsewhere."

### Solution | Streamline Data Delivery With Automated Reporting

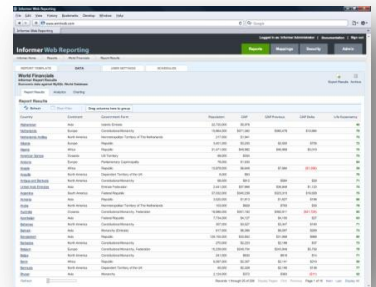
Ruhl & Ruhl chose Informer software for its ease of use, reporting and analysis flexibility, and automated scheduling capabilities. Informer's built-in query engine enables both technical and non-technical business users to generate and schedule reports based on LIVE production data.

"Entrinsik's support staff helped write the production comparison reports and with the ease of scheduling reports, they are available when needed without having to create separate reports and do the comparisons manually", said Tim.



"With Informer, it's easier for me as a manager to keep a handle on what is going on in the agency"

Tim J. Smith / Agency Manager  
Ruhl & Ruhl Insurance



"A huge time saver has been our ability to set up and schedule several reports to go to individual producers and management automatically."

Tim J. Smith / Agency Manager  
Ruhl & Ruhl Insurance



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Informer presents information in drag-and-drop form to give users at Ruhl & Ruhl choices on how they want to assemble, schedule and deliver reports. The result is improved time to decision and end-user satisfaction, drastically reducing the cost of creating, maintaining and delivering reports.

"Writing the reports is much easier and the automatic scheduling is great", said Tim.

## Results | Actionable, Meaningful information Delivered When and Where It's Needed

Multiple users at Ruhl & Ruhl have set up and scheduled several reports to go the individual producers and management automatically. Prior to implementing Informer, the reports were done as requested, not at all, or when a report writer had the time to run it.

"With Informer, it's easier for me as manager to keep a handle on what is going on in the agency; I just need to read the reports as opposed to creating separate reports, combining, and then reading", said Tim. With Informer, Ruhl & Ruhl is now able to deliver the right information in the right format to the people who need it quickly and easily.

## Contact us for a FREE trial

For a demonstration of Informer Web Reporting or a free 30 day trial call us today at 888-703-0016 or email at [sales@entrinsik.com](mailto:sales@entrinsik.com).

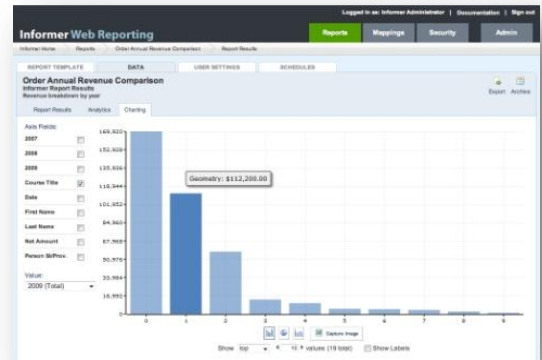
## About Entrinsik

Since 1984, Entrinsik has been developing, implementing, and supporting database solutions that enable organizations to maximize performance and improve bottom lines by tracking, understanding, and managing information.

With tens of thousands of users across various industries, Entrinsik's Informer Web Reporting software delivers real-time access to multiple data sources simply and easily using a built-in Web-based query engine to provide a single point of secured information access for ad hoc reporting, report customization and analysis.

Entrinsik's SEMtek ERP software now drives many of the nation's largest professional and continuing education profit centers.

For a product demonstration or a free 30 day trial, call 888-703-0016 or email [sales@entrinsik.com](mailto:sales@entrinsik.com).



"With the ease of setting up schedules for reports and archiving them, they are available when we need them without having to create the separate reports and do multiple comparisons."

Tim J. Smith / Agency Manager  
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