



Client Spotlight

Accelerating Growth: A Seamless Digital Transformation



Rick Jones
President
Forrest T. Jones & Company



Executive Summary

Forrest T. Jones & Company (FTJ), a leader in association-driven insurance programs, has successfully launched OneShield Market Solutions to enhance operational efficiency and accelerate growth.

Faced with legacy system constraints, FTJ sought a modern, scalable core system to support its strategic initiatives. OneShield Market Solutions provided the automation, flexibility, and configurability needed to streamline policy administration, improve customer experience, and position FTJ for long-term success.



"Implementing OneShield Market Solutions has been a game-changer for our business. We now have a more efficient, scalable system that enables us to focus on delivering exceptional service to our policyholders."

Rick Jones, President, Forrest T. Jones & Company



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About Forrest T. Jones

Forrest T. Jones & Company is a national insurance provider specializing in association-driven insurance programs. With decades of experience, FTJ offers tailored insurance solutions for various professional and affinity groups, focusing on delivering high-quality customer service and innovative policy management.



Business Challenge

FTJ's previous system faced limitations that hindered growth and operational efficiency. The company required a digital transformation to:

- Improve automation and reduce manual processes.
- Enhance operational scalability to support growth.
- Streamline policy administration and servicing.
- Improve digital experience and B2C portal capabilities for policyholders and internal users.

Why OneShield?

FTJ selected OneShield Market Solutions for its proven track record of delivering robust and scalable solutions tailored for MGAs and Program Administrators.

The platform's flexibility in automating and streamlining insurance operations and its configurable, cloud-based architecture aligns with FTJ's digital transformation goals.

Additionally, OneShield's seamless integration capabilities ensure compatibility with FTJ's existing ecosystem, while its speed-to-market functionality enables FTJ to respond quickly to emerging opportunities.

Solution & Implementation

FTJ successfully implemented OneShield Market Solutions, leveraging its capabilities to:

- Automate policy administration processes, reducing manual workloads.
- Enable straight-through processing to facilitate seamless, no-touch underwriting.
- Enhance data management and reporting.
- Improve scalability for future business expansion.
- Create a more intuitive experience for policyholders and staff.
- Integrate with Input1 to enable digital payments for policyholders.
- Deliver a customized B2C portal to improve efficiency and modernize the policyholder experience.



Results & Impact

With OneShield Market Solutions, FTJ has transformed its operations, replacing time-consuming manual processes with efficient, automated workflows. In the past, FTJ received thousands of checks annually for its private practice business, each requiring manual application—today, only a handful of checks are received each month, with most payments now made by credit card. Previously, thousands of policies and endorsements were mailed out every year; now, those documents are delivered instantly to insureds through digital channels, saving significant time and money.

Future Roadmap & Next Steps

FTJ is poised to leverage additional capabilities within OneShield Market Solutions to further enhance efficiency and customer engagement. Plans for expanding automation and additional system features are being considered to support ongoing growth.

10,000+

Submissions are now processed annually through an online customer portal.



Improved automation and operational efficiency.

95%

95%+ of eligible policies are seamlessly bound through automated workflows, eliminating the need for underwriter involvement.



Enhanced customer service capabilities through streamlined processes.

Conclusion

Forrest T. Jones' successful adoption of OneShield Market Solutions highlights the power of digital transformation in the insurance industry. By modernizing its policy administration platform, FTJ has positioned itself for continued growth and operational excellence.

Learn how OneShield Market Solutions can support your organization's transformation.
Visit us at www.OneShield.com.

