

Southern Insurance Underwriters Realizes Automated & Streamlined Employee Performance Management with emPerform

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About Southern Insurance Underwriters

Southern Insurance Underwriters (SIU) was established in 1964 as a Georgia corporation. Since that time SIU has grown to become one of the largest family owned MGAs in the country, providing a broad range of property, casualty, and transportation products and specializing in hard to place, specialty and excess & surplus lines risks. SIU relies on an experienced staff of seasoned underwriters to deliver quality output and results.

Performance Management Challenges at SIU

Manual forms, zero status tracking & lack of consistency in appraisals drove SIU to search for a better employee performance management platform.

Prior to using emPerform, SIU relied on spreadsheet appraisals forms as the basis of their performance management process. Forms had to manually weighted and scored, saved and passed back-and-forth between managers, employees and human resources. The entire process was incredibly time consuming and the organization was unable to track the status of reviews or performance.

Furthermore, between individual Excel files could be altered, users would often make changes and manipulate forms as they were being saved and re-saved, resulting in missed information and significant variations in the scores and responses across the organization.

"We had no way to track the status of appraisals or to ensure consistency," said Rebecca Rice, Human Resources Specialist at SIU. "In addition, there was often missing information, causing frequent follow-ups from HR. Overall, it was a very impure, manual, and cumbersome process."

The company came to the conclusion that in order to align, reward, and retain their valued staff, they would have to automate and streamline performance management across the organization, including periodic reviews, annual assessments, and compensation planning. SIU began their search for a talent management system to help realize their goals.

The Search for a New Performance Management System

SIU reviewed six different solutions and ultimately selected emPerform for its configurability, usability, and compensation management functionality.

SIU's entire Human Resources team rallied and evaluate a large pool of performance management system and vendors. "Multiple human resources staff members had individual meeting with all vendors and each person come to the same conclusion—that emPerform's system was superior," continued Rice.

"The emPerform team provided a friendly yet direct approach to showing us the system and options," said Rice. "This honesty and helpfulness is very helpful when considering multiple solutions."

Major contributing factors to SIU selecting emPerform were the ability to customize and personalize emPerform to suit the company's unique needs, the user-friendly aspect of the program, and the inclusion of compensation management functionality. " We ultimately decided that if an investment of this type was being made in a performance management system, the compensation planning piece should be a part of it," said Rice.

Getting Up and Running with emPerform



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*– Rebecca Rice, Human Resources Specialist,
Southern Insurance Underwriters*

“Whether we’ve had big or small changes in our forms, the emPerform team goes the extra mile to help us fix them immediately. From a non-technical mindset, they have made our staff feel confident with the system.”

To get started with emPerform as quickly as possible, SIU opted for a rapid remote emPerform implementation and training package.

The Results

Since implementing emPerform, Southern Insurance Underwriters has reduced the time needed to complete appraisals, increased the consistency and frequency of reviews and feedback across the organization, and has full visibility into the status and progress of employee reviews and performance.

Significant Time-Savings with an Automated Process

The biggest benefit of using emPerform at SIU has been the ability to automate every step of the performance appraisal process. “Our users are no longer required to find, save and email individual appraisals and HR doesn’t have to constantly send out reminders,” said Rice. “emPerform’s workflow and notifications ensures complete information is entered by SIU staff and then routes appraisal forms to the right people and notifies them automatically.” The results has been an easier process with significant time-savings for staff and HR.

Increased Consistency of Performance Weighting and Scoring

Using emPerform, SIU was able to automate the scoring and weighting portion of performance reviews, eliminating the human error and inconsistencies involving in manual weighting and scoring. Now, all employees are evaluated fairly across the organization and there is no need for HR to manually adjust or review weights and scores.

Ongoing Feedback and Performance Journals

Using emPerform’s [tag™ module](#) for ongoing feedback and journals, SIU has been able to increase the frequency and accessibility of performance feedback and performance journaling. “The ability to ‘tag’ others and make easy journals has been a favourite with staff,” said Stacy Clubb, AVP of Human Resources at SIU. SIU hopes that better record-keeping will help increase the accuracy of appraisals and that more frequent feedback will engage and acknowledge staff in a timelier manner than was possible before.

Easy Status Tracking

SIU now has complete visibility into the progress of appraisal forms and individual performance. Using emPerform’s reports and dashboards, HR and managers can monitor and track where individuals employees are in the process as well as the overall status of individual performance criteria.

Looking Ahead to Pay-for-Performance

SIU will work with emPerform to implement and automate a fair and consistent pay-for-performance strategy.

The next step for SIU is to work with emPerform to build on their talent management strategy. By implementing and integrating a pay-for-performance process using emPerform’s [Compensation Manager](#), SIU will be able to allocate employee merit and variable compensation adjustments fairly and consistently throughout the organization. This will help SIU to reward and retain its valuable staff while staying in line with the business’ bottom-line.

As a mid-sized company in the insurance industry, SIU has always walked a tightrope of finding and keeping the right talent within their given resources. "We have consistently struggled with attracting and developing highly-skilled professionals with the desired experience needed to deliver quality services—while staying on budget for salary and compensation plans," said Rice. "We are excited to see what the benefits of the compensation module bring."

Get started today!

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