

Insure on the Spot Case Study

Turnkey Office Build-Out & Relocation for Fast Growing Business

"Equilibrium was instrumental in helping Insure on the Spot manage all the chaos involved with building out and relocating to our new state of the art facility. Their Project Management oversight helped to meet key deadlines and control the costs across the many vendors on this project." – Mike Kariotis, Founder & President of Insure on the Spot

Case Study Profile

Company

Insure on the Spot provides auto insurance for cars, trucks, and SR-22s.

Industry

Auto Insurance

Location

Chicago, IL USA

Challenges

- Expanding business into a new rough office space
- Implementation of both project management and IT migration

Solution

- Microsoft Software

Partner

- Microsoft

Results

- Profitable Return on Investment
- Enhanced customer service portal
- "State-of-the-art corporate office facility"

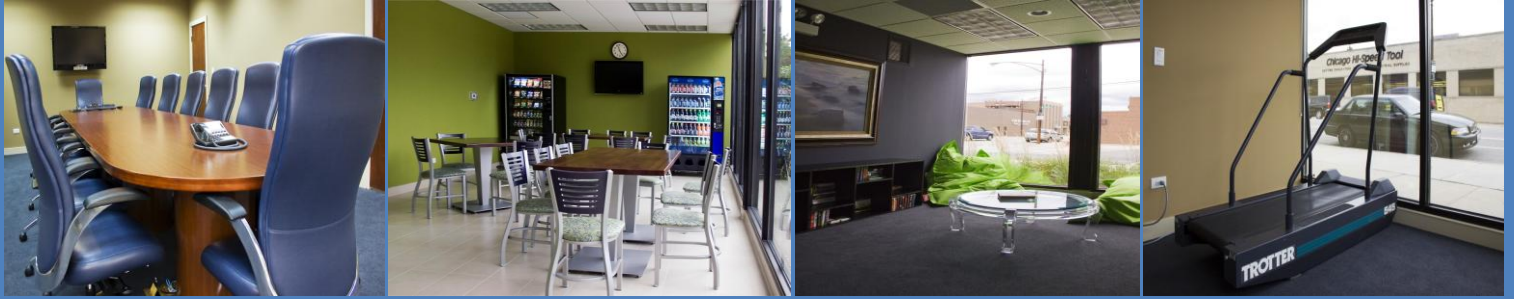
Situation

Insure on the Spot (IOTS) is a Chicago, Illinois based independent auto insurance agency with the freedom to find the best rates for client's car insurance. IOTS has been utilizing cutting edge technology to change the way people buy car insurance since 1986.

Due to tremendous business growth, IOTS outgrew their original (3,000 SF) office space and server room. The founder and President of IOTS, Mike Kariotis, purchased a significantly larger (20,000 SF) warehouse building on Elston Avenue, conveniently located one block from one of Illinois' largest Department of Motor Vehicle (DMV) facilities.

The rough building space needed to get transformed into modern office space within a short amount of time (less than 12 months). This complex multi-vendor project needed to include orchestration of the Owner, the Architect, the General Contractor, and the Sub Contractors (flooring, electrical, cabling, phone, alarm, video security, IT, etc.) while managing the budget. No detail was overlooked. For example, the main floor of the IOTS Call Center was raised to provide all the data, voice, power cabling to each agent's desk. This resulted in a clean look that is also very functional.

Mr. Kariotis' strategic vision was to build out a modern headquarters office that would include "Centers of Excellence" capable of supporting IOTS' future business expansion plans.



Other state of the art technology areas included: The Conference Room, On the Spot Café, Quiet Room, and Employee Health and Fitness Center. These facilities were all part of the new office build-out to create an enhanced work environment for Insure on the Spot employees.

The design of IOTS' new state of the art facility needed to include planning and building out the following:

- Walk-up Payment Center
- Customer Service Center
- Data Center
- Call Center
- Operations Center (Accounting, Finance, Underwriting)
- Training Center

Strategy

Mr. Kariotis' strategy was to engage Equilibrium IT Solutions for technical project management and IT engineering professional services. Equilibrium was responsible for insuring that the overall Office Build-Out & Relocation Project was:

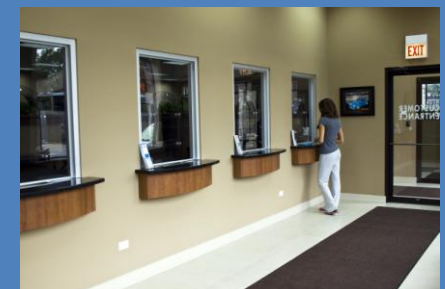
- On time
- On budget
- Successful in achieving all goals

Approach

Equilibrium's approach, to insure the overall success of the Office Build-Out & Relocation Project for Insure on the Spot, started with co-developing an IT Business Plan with Mike Kariotis. The project plan served as the multi-phased road map for accomplishing each stage of the transition.

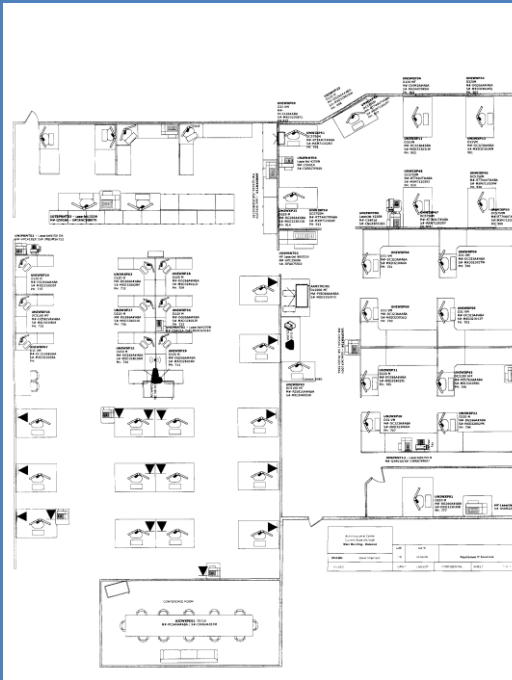


Walk Up Window Before



Newly Renovated Customer Service Counter

Phase 1 - Design & Project Plan



Phase 2 - Implement & Test



Phase 3 - Cutover & Document



Phase 1 – Design & Project Plan

- Assist with the architectural floor plan designs
- Perform as the “Prime” Project Manager
 - Develop and maintain the Master Project Plan
 - Resource scheduling
 - Task assignments
 - Insure timely task and milestone completion
 - Project status reporting
 - Budget status reporting
 - Change management

Phase 2 – Implement & Test

- Build-Out Data Center
 - Install a natural gas generator for 7 X 24 X 365 backup power
 - IOTS’ new online Customer Service Portal
 - WAN connectivity to IOTS’ 7 branch offices
- Implement new IT infrastructure

Phase 3 – Cutover & Document

- Smooth cut-over
- On-going IT Support as needed

Business Results

- Turnkey move into state of the art corporate office facility
- Able to stay connected (phones and computers) with their clients during the move
- No downtime
- Redundant WAN connectivity to satellite offices
- Virtual office capabilities including video conferencing
- Online ‘Customer Service Portal’

- Online 'Point of Sale' system
- Increased business resulting in a quick Return on Investment
- Adherence to all regulatory compliance
- Enhanced data protection, recoverability, network security, and application performance

New Microsoft Technologies

Equilibrium implemented and configured the following Microsoft technologies for Insure on the Spot to help them achieve their operational business requirements:

- Windows Server 2008
- Terminal Services
- SQL Server 2008
- Office SharePoint Server 2007
- Exchange Server 2007

"With the volume of calls and processing we do, one day of downtime could have been catastrophic. The Equilibrium team ensured a seamless project move, which resulted in no down time at all. I could not be more pleased with Equilibrium's professionalism, project management skills and true caring. The team's concern and passion to deliver is clearly evident!"

- Mike Kariotis,

**Founder & President of
Insure on the Spot**