Success Story | Pro.

Pro Global powers board meetings and collaboration with Brainloop

Pro Global Insurance Solutions plc has been providing outsourcing and consultancy services to the global insurance markets for over 30 years. In order to sustain rapid growth and enhance IT security, it needed to take a holistic approach to corporate data management. Brainloop enabled Pro to become a more unified, efficient and secure business, delivering the capabilities of three solutions in one consolidated platform. Today, Brainloop continues to help Pro achieve its strategic IT objectives, cost-effectively.

THREE USE CASES, ONE SOLUTION

With Brainloop's single platform, Pro streamlined three key business processes:
1. **The preparation of board and executive packs**
2. **Collaboration with external auditors**
3. **Ensuring business continuity**

This eliminated the need for a costly new board portal and document management system and allowed Pro to cancel its existing virtual dataroom contracts. However, before implementing the platform, Pro needed to ensure the solution would meet the needs of a global workforce. An urgent requirement for a dataroom arose during discussions with the Brainloop team, so Pro decided to conduct a live trial. The Brainloop dataroom was delivered within minutes and user training was conducted the same day. Pro quickly realised the advantages of the platform; in particular it was impressed with the intuitive user interface, fast document upload speeds and flexibility of user permissions. The live trial was a success.

Pro.

„For Pro, Brainloop is more than just a typical board portal or a dataroom service. It helps bring the company together for governance on a number of projects, enabling a one team approach across all territories."
Mike Dalzell, Company Secretary, Pro

BOTHERSOME BOARD PACKS

Creating and distributing board meetings materials was a significant challenge for Pro. The existing dataroom solution was slow, uploading files was a laborious process for administrators. What's more, materials were emailed to board members, which subsequently caused problems in its own right. Directors would often print packs, or save them to Dropbox, increasing the likelihood that sensitive data would be exposed or lost. Many directors also wanted board packs to be accessible and editable on tablet devices, something the existing format didn't cater for. Developing hard copy versions of board packs was another pain point. As each pack was around 200 pages long, this process was time-consuming and distracted personal assistants from more important tasks.

CULTIVATING COLLABORATION

Operating a global office network, Pro has found collaboration between international staff is critical to the success of their business. Without a central document depository, it struggled to support remote team-working, files were being saved on disconnected systems and different drives, leading to multiple versions of the same document – introducing risk and confusion.

To facilitate secure document sharing amongst internal teams, clients and partners, Pro used a number of techniques, such as email attachments, document encryption and third-party cloud storage such as virtual datarooms. However, these approaches often hampered productivity and slowed collaboration.

POWERING PRODUCTIVITY

Brainloop was rolled out to all Pro offices in November 2015. The group saw instant results, streamlining three key processes; the preparation of board and executive packs, collaboration with external auditors and ensuring business continuity. Printed board materials were replaced with a digital pack that directors could view and amend with their tablet devices. These packs included a cover page, contents page and whole pack page numbers. These relatively simple additions had a dramatic impact. Where previously overseas directors had struggled to navigate board packs when participating in conference calls, now they could rapidly identify specific sections or pages of the document.

Armed with a selection of annotation tools, including bookmarking, freehand pen and sticky notes, board members are now adequately equipped to prepare for meetings. Directors can share their annotations and comments, or print them if required. Annotations are stored as a layer on top of documents and if a meeting pack is updated they remain in the same position, meaning they will never be lost.

From the administrators' point of view, creating and distributing board packs is now a simple and far more efficient process. Once executives have submitted reports into the Brainloop platform, secretaries can create a single PDF board pack with a click of a button.This pack is sent to directors' devices securely and administrators are notified when the directors open it. With comprehensive auditing and reporting functions, there is now greater visibility and control around board materials.

Pro.

"We are currently defining our strategy for 2017 and considering how Brainloop can help us drive the business forward."
Mike Dalzell, Company Secretary, Pro

BRAINLOOP

On many projects, all of the Pro offices can now collaborate in the same space and manage files in a single repository. Brainloop's advanced functionality, including tasks and notifications, increase productivity and drive efficient collaboration both internally, and with external partners, auditors and regulators.

A single file directory enables employees to easily access documents from any location or device, ensuring enterprise-grade control and maximum security. Pro is now looking to use Brainloop's workflow capabilities and approvals to further improve collaboration across the business.
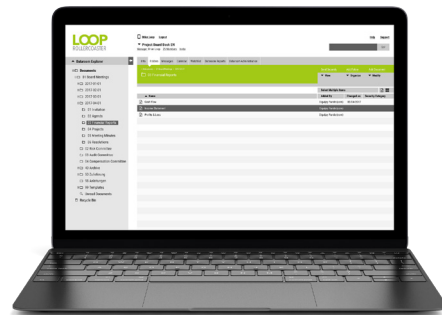
Pro.

"Brainloop brings many areas of the company together to work as one team across all territories. It is more than just a typical dataroom service, Brainloop provides us the ability to go beyond document storage, board portal or due diligence. Our business has changed over the last two years and grown significantly; Brainloopwas able to cover all of our immediate needs and we constantly find new use cases across the entire group."

Mike Dalzell, Company Secretary, Pro

TRAINING AND SUPPORT

As Brainloop is so intuitive, minimal training was required for end users. After a five minute introduction, Pro's staff were able to use key features and instantly start collaborating on documents. Brainloop also provided training and dataroom templates to simplify and streamline the creation of new datarooms.

Pro.

"Brainloop's training and customer care are fantastic. It's always easy to get hold of somebody, even on weekends, and the helpdesk has always been reliable. All of our boardmembers were happy with the training and as the Brainloop apps are so intuitive, in some cases it wasn't necessary."

Mike Dalzell, Company Secretary, Pro

BRAINLOOP