

- ✓ Cherwell dashboard replaces daily IT meetings, saving \$700/day on average
- ✓ Compliance Reporting workload reduced by 50% for four full-time employees

By simplifying ITSM, mutual insurance company vastly improves service experience for internal business partners.

## The Challenge:

CUNA Mutual is a leading insurance, financial services and technology company. For its IT department, the measure of success is providing the highest level of service to its internal business partners. Its legacy ITIL® processes system was difficult to maintain and complex to modify, greatly hampering those efforts. Time that the team could have spent innovating and being responsive to customers was lost to tending the outdated and cumbersome system.

When CUNA Mutual leadership made the move to Agile processes, it was the ideal time to revamp the company's IT service management (ITSM) strategy. The CUNA Mutual ITSM team needed a simplified implementation of ITIL up front, including codeless development, and the ability to highly customize the solution in the future. And, being a financial services company, CUNA Mutual is subject to mandatory reporting requirements - a function they were keen to automate in the new ITSM environment.



“Cherwell has drastically simplified how our business partners get their IT services from us. That advancement has created an improved sense of partnership with IT, which is invaluable.”

**Elliott Peach**  
Service Management Engineer,  
CUNA Mutual

## The Solution:

The low-code Cherwell platform proved an excellent fit for CUNA Mutual. The IT team was able to easily implement a new ITSM solution and build on its functionality over time.

The roll out of the Cherwell IT Portal and the integration of Bomgar chat support provide services to CUNA Mutual business partners in a seamless, convenient and time-saving way. Chat volume doubled in the first six months as users throughout the company enthusiastically embraced its use.

CUNA Mutual achieved its compliance reporting automation goals with Cherwell. The time spent on reporting and follow up has dropped by 50 percent, allowing valuable IT personnel time to be repurposed.

CUNA Mutual continues to leverage the functionality of the Cherwell solution, including the planned roll out of trusted agents to support automation initiatives.

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“This is the first time we’ve offered chat support, so it’s huge for us. Customers are getting help quicker and IT staff aren’t on back-to-back phone calls all day. Cherwell chat support integration is helping us increase user satisfaction.”

**Elliott Peach**

Service Management Engineer,  
CUNA Mutual

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### Business Impact

- Time savings for IT, enabling increased productivity and impact
- Streamlined IT engagement processes, resulting in increased internal customer satisfaction
- Support of move to Agile delivery of products and services

