

Insurance Case Study: CAA South Central Ontario

“The OnBase system has provided us with leading-edge technology, enabling efficient business practices and resulting in a superior customer experience.”

— **Matthew Turack**
Vice President, Insurance
CAA South Central Ontario

The Customer

The Canadian Automobile Association South Central Ontario (CAA SCO) is an automobile club delivering quality roadside assistance, insurance and travel services. Recognized as a Celent Model Insurer based on best practices for optimizing infrastructure and effective project management, CAA SCO has over 1.8 million card-carrying members.

The Challenge

Using technology to decrease time spent printing documents and processing mail might seem simple, but at CAA SCO, the impact of the initiative went far beyond time and money. To achieve the highest rated customer service among AAA clubs, CAA SCO identified the need to reinvest in imaging technology. Their core mission – providing exceptional service and high value to members – was plagued by a legacy document imaging system that impeded access to customer files, creating process bottlenecks across the enterprise. In order to ingest information from any source, staff members had to print documents, send them to the mail room, then wait for them to be scanned and indexed – a process that could take a week or more. Incoming correspondence from customers, whether by mail, fax, or EDI, had to be routed through this process, creating mountains of tedious, administrative work. This also created challenges in maintaining service levels in claims processing and made it difficult to efficiently turn around policy documentation for agents and customers. When members called with questions about their claim status, it sometimes took days to find the information to address their issues, causing frustration and rising service costs. Because their document imaging system was no longer supported by the original vendor but was mission-critical to their business, CAA SCO found themselves with limited options and elected to replace the system since their core mission was being hampered rather than supported by technology.

The Process

The CAA SCO initiative to improve service and business processes by replacing its legacy document imaging system with an OnBase Enterprise Content Management (ECM) solution had an accelerated timeline. To make the project a success, the new ECM system had to be up and running within a very short time. In April 2010, with assistance from ImageSoft, Inc., CAA SCO completed the conversion, went live with OnBase and had customer service technicians working again within four days. Rather than having to print content, send it to the scanning department and wait for it to be ingested into the system, CAA SCO was able to instantly access customer information. By integrating with a variety of in-house applications, such as Novell Groupwise, Rightfax, GIMS, MRM by CDC, HCAI System, and Mitchell International Auto Damage Appraisal System, CAA SCO is able to pull data from those applications for re-use in document indexing using automatically filled keyword sets – eliminating 90% of manual effort to index content. As content is ingested, workflows are

triggered and routed to the appropriate worker rather than being held up in the mail room. During phone calls, even if a customer's assigned claim adjuster is not available, another staff member can view the information and speak to the status of the claim. On customer visits, service and claims staff members are able to achieve single call resolution. Because calls are resolved quickly, wait time for inbound callers is greatly reduced.

Their Success

CAA SCO's conversion from a legacy imaging system to a new OnBase ECM solution was successfully accomplished within an extremely limited time frame. Quantitatively, processing time to ingest documents decreased by 75% – from four days to less than one day for documents to be available for retrieval. In addition, headcount decreased by 20% in the document management department.

The application has added functionality with the implementation of document workflow queues. Users can now track documents throughout their life cycle, reference them immediately and thereby improve the member service experience. Document history and audit trails are recorded, clearly showing who created, indexed, edited, viewed and moved documents. This information is immediately available. OnBase integrates with various third-party applications allowing for automatic routing of documents and further streamlining processes. Workflow also reduces paper handling and error-prone manual processes that were in place prior to implementation.

Now that CAA SCO's technology is aligned with its organizational mission, customer service associates are able to exceed customer expectations. Armed with instant information, customer service associates can swiftly and readily address customer questions and resolve their issues. Instead of waiting for a paper document to be ingested into an aging legacy system, associates can access needed information with a click of a mouse. As a progressive, member-focused company, CAA SCO's strategic decision to migrate to a robust, modern ECM system has handsomely paid off.

CAA SCO

The Challenges

- Outdated and slow legacy document imaging system
- Labor-intensive scanning and indexing process
- Incoming correspondence created mountains of tedious, administrative work
- Slow turnaround time in getting policy documentation to agents and customers
- Difficulty maintaining service levels in claims processing

The Results

- Conversion from a legacy imaging system to a new ECM solution was accomplished in an astoundingly tight time frame
- Processing time to ingest documents decreased by 75% – down from four days to less than one day for documents to be available for retrieval
- Headcount decreased by 20% in the document management department
- Streamlined processes through integrating with third party applications
- Instant information access