



Insurance Company Ensures Information Accuracy

Industry

- Property & Casualty Insurance

Company

- 8000 employees

- Over 14 offices

- Over 6 billion revenues in 2006

Challenge

- Streamline markup and review of workflow process

- Consolidate electronic documents on a central server to allow multiple users in various locations easier access

Environment

- EMC Documentum

Return On Investment

- Faster document transfers between departments
- Simplify workflow
- Increase productivity



Review Process Streamlined with Brava!® for EMC Documentum

Company Overview

The company was founded in the 1920s and has since focused on serving the insurance needs of drivers, home owners and owners of small- and mid-sized businesses. They have over 8,000 employees and 14 offices, as well as an army of independent agents across the United States. An innovative company, it was one of the first companies in the United States to use computer technology to streamline its relationship with independent agents. Their creativity paved the way for automation's integral role in the future of the entire industry. Today, the company's vast electronic network helps employees achieve better performance and higher productivity, ensuring their products and services are among the industry's best.

Operational Challenge

There was a need to streamline the then manual review process for business insurance applications. Typically, a Service Assistant (SA) would receive an ACCORD application from an agent requesting a quote for various types of business insurance. The SA would print the document and write in any missing information, highlight or circle areas of importance and add notes. The document would then be physically routed through the underwriter and the agency services coordinator for additional review and comments before being filed away in a cabinet. This made it inconvenient to access later and didn't afford other regional offices across the country access to the handwritten notes.

Going Digital

As innovative leaders, the company worked on designing and building a custom system built on the EMC Documentum platform. One of the biggest requests they had from users during the design phase was for electronic annotation tools. Their in-house EMC Documentum researcher suggested Brava!® Enterprise, a web-based view and annotation tool from Arizona-based Informative Graphics®, which he had used in other EMC Documentum installations. Together, EMC Documentum and Brava made the custom design an effective reality.

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An Efficient Solution

With the custom system in place, SAs can now receive an ACCORD application in PDF, TIFF or JPG format and review it within the custom system for missing information. Brava can be opened within the custom application by clicking on the integrated Brava icon and use Brava's annotation tools, like free-form text, to add missing and/or additional information. They can then electronically route the request for insurance to the Underwriter, who also opens it in Brava to review the SA's comments. The Underwriter can then use Brava's annotation tools to add text, highlight important information, add notes and/or circle areas requiring additional research, and then electronically route the request to the Services Coordinator, who performs a final review within Brava, adding any additional comments or notes, and then enters the information into the company's mainframe rating system.

Once the request have been quoted and sent to the agent, the ACCORD application and all Brava annotations are stored within Documentum. Whenever a user opens any document with associated annotations, the custom system will automatically open the document within Brava and display the annotations.

"Our users really got what they needed with Brava," said the company's Business Analyst. "The custom system with Brava made our application workflow simple and efficient, and data is much easier to retrieve and to share with any regional office across the country."