



Customer Success Story | Insurance

# Top 100 U.S. insurer integrates systems for increased speed and accuracy

## The Challenge

Evaluating insurance applications was taking Utica National Insurance Group too long. Relying on paper was cumbersome. It also meant the competition could offer faster and more accurate service.

“We analyzed our intake process and found that looking at every single application, including those that maybe weren’t a good fit for us, was taking too much time,” said Joseph Malecki, senior analyst.

## The Solution

Working with authorized OnBase solution provider Continuum Solutions, Utica now uses OnBase workflow to evaluate incoming applications. OnBase automatically declines applications that aren’t good fits, while those that meet preset criterion immediately move to a supervisor who further evaluates them for viability. This gives Utica a competitive advantage by expediting the process – letting agents focus on the best-fit applications, processing them without delay.

## Work flows throughout the organization, speeding application processing

By automating the intake process, OnBase automatically captures and indexes documents – from email, faxes and more – so Utica processes fewer documents manually. Now Utica can handle more of the right applications, quicker. Eliminating bottlenecks, OnBase provides Utica with metrics to further optimize processes. Workflow also empowers the insurer to reduce expenses by no longer mailing hardcopies of documentation.

“Workflow is probably the most beneficial part of OnBase to our organization. We’re more efficient, writing better business and reducing the expense associated with investigating every application,” said Malecki.



### CUSTOMER

Utica National Insurance

### INDUSTRY

Insurance

### SIZE

Top 100 insurance organization in U.S.  
\$56,000,000+ in revenues  
750 employees

### LOCATION

New Hartford, NY

### ONBASE INTEGRATIONS

Duck Creek Policy Administration

### DEPARTMENTS USING ONBASE

Operations  
Underwriting

One platform **Unlimited potential**

**OnBase**  
by Hyland



**"We're more efficient, writing better business and reducing the expense associated with investigating every application."**

**Easily integrates systems to increase communication and share real-time information**

Utica uses the OnBase integration with Duck Creek Technologies to automate part of the intake process. Access to documents, information and processes is now so easy, agents can even apply online. The integrated solution means end users stay in familiar applications, like Duck Creek, to find the information they need, so there's minimal training and better decision making.

"Integrating OnBase with our in-house systems, even some third-party systems, is one of the best assets that we have," said Malecki. "There were so many nonintegrated solutions like Duck Creek and our other homegrown systems. With OnBase, we bring them all together. It's the magic that gives us the competitive edge that we need to compete."

**Streamlines processes to expedite decision making**

But it's not just about internal processes. Utica knew it also needed to make life easier for agents, or they would take their business elsewhere.

"Our customers are independent agents and brokers and they have a choice in the carrier with whom they want to place their business. So we are committed to being their number one choice. And we do that through ease of doing business," said Malecki.

Turning this into a competitive advantage, Utica is now regarded as one of the top 100 insurance companies in the country and has an A- (excellent) rating from A.M. Best.

"I'm really proud of that fact, and it's through hard work and through tools like OnBase that we are able to accomplish that," said Malecki. "There is no question in my mind that without OnBase, we certainly wouldn't

be where we are today. And that is completely different from where we were 10 years ago. I think we are poised well for the future because of what we have been able to accomplish with OnBase."

**The Difference**

**Integrates key systems with minimal coding:** OnBase easily integrates disparate systems so they share real-time information, speeding access to information for better decision making. Additionally, users easily access documents and information in familiar applications, so there's little training involved.

**Empowers better, faster service:** With increased speed, accuracy and ease of processes, Utica is an easy choice for agents to do business with. Internally, IT easily fulfills business requests with little programming.

**Increases access, reduces expenses:** "Our agents are able to come online and through OnBase, they are able to view their documents and access them whenever they need them, 24/7. This has been a great benefit, not only from the expense that we save from mailing things, but we also reclaim the time that we would have spent printing and packaging and putting them out," said Malecki.

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