



Case Study | Insurance | CAA

## Insurer uses ECM to support obsession with member safety

### Customer

CAA

### Size

\$440,000,000+ in annual revenues

2 million members

1,400 associates

### Location

Thornhill, Canada

### OnBase Integrations

Guidewire

Lawson

Microsoft SharePoint

### Departments Using OnBase

Claims

Underwriting

**“The agility of OnBase has been critical to our success.”**

– Jay Woo, president and CEO,  
CAA

### The Challenge

CAA’s legacy enterprise content management (ECM) technology was a bottleneck to the organization. It was not well-integrated into CAA’s existing modern architecture, making it difficult to achieve efficient delivery of important information. This adversely impacted CAA’s mission for member safety.

### The Solution

Working with authorized OnBase solution provider ImageSoft, CAA’s mailroom now uses OnBase to capture documents and information electronically. OnBase then makes it easily accessible to employees in a central location, while workflows automatically deliver the right information to the right people, notifying stakeholders along the way.

Before, the process of consuming and organizing information was very inefficient. Employees had to send emails and make phone calls to decide who needed access to documentation and where it should be stored. Now, OnBase allows CAA to connect everything together and communicates through one system, increasing efficiencies.

### Empowers agents with information for better service

“When a person comes into the store or calls an agent over the phone, the information about that member is always available. In the past, agents had to spend minutes looking for information. Now, everything they need is at their fingertips. It creates an environment that shows we care about our members, that we have all the information we need to take care of them,” said Jay Woo, president and CEO of CAA.

**OnBase**<sup>®</sup>  
by Hyland

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CAA

Service is extremely important to CAA. That’s why it measures customer satisfaction and retention rates. Prior to OnBase, CAA’s retention rate was between 85 – 86 percent. Now, with OnBase speeding information access, CAA has increased its retention to 90 – 91 percent.

Exemplifying this ability, in 2013, the Greater Toronto Area suffered through a major flood in summer and a massive ice storm the following winter. There was a large number of claims by people with flooded basements and cars stuck on roads.

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#### **Integrates important systems to increase communication and share information**

Because OnBase is based on service-oriented architecture (SOA), CAA can connect multiple platforms – like Guidewire® and its front ends from the Internet – into a single system. This empowers employees with the kind of seamless information access they need to quickly help members.

“The fact that our associates store and access information in OnBase and Guidewire as if they were one native application also allows us to be nimble when we make changes to conform to industry regulations and regulatory requirements,” said Woo.

#### **Mitigates risks by decreasing paper dependency**

Paper-based documents are susceptible to theft, loss or damage. Adding even more risk, the insurance industry is full of exposure to fraud. OnBase helps mitigate the risk of fraud with document recognition. By automatically scanning documents and recognizing patterns, it helps the claims department identify potentially suspect claims.

As CAA looks to the future, Woo says the first step is mobile connectivity, things like iPad applications and iPhone applications. The second step flows from the first, and is all about empowering member self-service through computers and mobile devices to enhance their experience.

## **The Difference**

**Empowers CAA to help members quicker:** Because information is easily accessible and is automatically forwarded through processes with workflow, when members have a loss, are involved in a car accident or are sick, CAA finds their information much faster.

**Integrates with key systems like Guidewire:** “OnBase is hugely effective in terms of integrating legacy systems. Its architecture has allowed us to integrate with many different systems, including data warehouses,” said Woo.

**Decreases costs and risks:** Instead of sorting, delivering, storing and mailing paper-based documents, CAA now uses secure electronic information to power faster, more accurate processes.

Learn more at [OnBase.com/Insurance](http://OnBase.com/Insurance) »

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