



Case Study | Insurance | Seguros de Occidente

Process improvement roadmap helps insurer write new business and process claims faster

Customer

Seguros de Occidente

Industry

Property & Casualty
Life
Medical

Size

130 employees

Location

Guatemala City, Guatemala

Departments Using OnBase

Claims
New business
IT
Operations
Finance

“This project is something that we couldn’t do on our own. Now that we have a custom-built roadmap, it will be easier to achieve our goals of getting policies issued faster and claims processed sooner.”

– Marta Julia Fernandez, IT Project Manager

The Challenge

Like most insurance organizations, Seguros de Occidente (Occidente) wanted to increase its market share and rise above its competitors. The insurer was successfully using OnBase to electronically manage business processes, but Occidente leaders knew they weren’t using the solution to its fullest potential. Occidente needed to create a short- and long-term plan for continuous process and system improvements.

Occidente engaged Hyland, Creator of OnBase’s Enterprise Solutions Group (ESG) to help the company optimize their operations.

The Solution

ESG conducted an Enterprise Information Assessment (EIA), analyzing Occidente’s insurance processes and systems. The EIA identified areas where Occidente’s staff, processes and technology were successfully working in tandem while offering objective insight to the areas where they were not achieving the most efficiency.

Within weeks of the assessment, ESG provided the insurer with a thoroughly documented roadmap to help the company develop a better understanding of what process improvements it needed, where and why. Occidente empowered its employees to better use existing applications to help make day-to-day tasks more efficient and cost effective, reducing the time it took to issue new policies and process claims.

“The ESG team knows their business and is easy to deal with. They are receptive: despite their knowledge, they listen to their customers.”

– Mario Roberto Valdeavellano, general manager,
Seguros de Occidente

The Difference

Focused, effective research: “The Hyland team gathered information by meeting with our staff and checking our processes on-site. Their questions were focused on our company processes, goals and strategies,” says Mario Roberto Valdeavellano, general manager. “What impacted us the most was that it was not like most business consulting services. The topics were targeted and detailed. Meetings were indeed effective, especially when it came to obtaining information from our personnel.”

Holistic approach: Hyland’s ESG analyzes business problems – not just technical problems. “We needed help communicating how the different teams could use OnBase to meet their individual needs,” says Fernandez. “The ESG team helped us do that from the first meeting.”

Actionable strategies for short- and long-term needs: “The number one recommendation Hyland gave us was to create an ECM committee,” says Fernandez. “The roadmap then directed us to refresh our existing imaging processes and build an electronic foldering solution. It gave us advice on how to make it easier for our teams to move from a paper to electronic environment so we can get work done faster.”

Prioritized Process Improvement: “The ESG team had the right skills to lead the discovery sessions, ask the right questions and build solutions right away,” says Fernandez. “Now we can implement their recommendations and solve our biggest challenges faster.”

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