

Brava!® Streamlines Insurance Application Process

Vertical Industry

- Property & Casualty Insurance

Functional Areas

- Underwriting
- Claims Processing

Company Facts

- 8,000 employees
- 14 offices
- Over \$6 billion in revenue

Challenge

- Streamline markup and review of workflow process
- Consolidate electronic documents on a central server to allow multiple users in various locations easier access

Brava Solution

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

Property and casualty insurance companies focus on the insurance needs of homeowners, drivers and business owners. Most of the insurance applications and claims in the U.S. are recorded on Association for Cooperative Operations Research and Development (ACORD) forms. A nonprofit standards organization, ACORD is well-known for its vast library of forms used by the insurance industry.

For insurance companies that manually process ACORD forms, challenges can arise because the process is not only inefficient and time intensive, but it also makes it difficult to share or collaborate on documents.

In response to these challenges, one insurance company focused on designing and leveraging a custom system built on the EMC® Documentum® platform.

The Need for Electronic Annotation Tools

During the design phase, the company found that one of the biggest requests from its users was for electronic annotation tools. The insurer's underwriters, service assistants (SAs) and agents wanted an easy way to add and share notes.

The company's in-house EMC Documentum researcher suggested Brava!® Enterprise, a web-based view and annotation tool from Informative Graphics Corp. The researcher had used Brava in other EMC Documentum installations and knew it delivered the annotation and collaboration capabilities that the insurer's team needed. Together, EMC Documentum and Brava made the custom design a powerful solution.

Streamlining Collaboration

As a universal viewer, Brava lets users view and markup virtually any file type. This lets an insurance agent send an application or claim to the SA in any format, including PDF, TIFF or JPG.

Because Brava launches within the custom application when the user clicks on the integrated Brava icon, SAs can easily and electronically review insurance forms. Brava's annotation tools let the SA insert missing content or supplemental information before electronically routing the insurance request to the underwriter.

Instead of physically routing an insurance application from agent to SA to underwriter, Brava gives users the ability to electronically add and share notes. Users can also highlight important information and circle areas that require additional research.

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Brava Streamlines Insurance Application Process

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Once the request has been quoted and sent back to the insurance agent, the ACORD application and all Brava annotations are stored within Documentum. Whenever a user opens any document with associated annotations, the custom system automatically opens the document within Brava and displays all annotations. Prior to implementing Brava, hard copy forms were stored in a filing cabinet. Physically filing forms in this way not only made it inconvenient to access later, it did not afford regional offices across the country easy access to handwritten notes that were on documents.

Summary

With more than 8,000 employees, 14 offices, and a host of independent agents across the U.S., the insurance company appreciates that Brava has helped to improve how its team views, annotates and shares documents.

“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.”