



## Case Study: BoatU.S.



### Customer Overview:

BoatU.S., the Boat Owners Association of the United States, has been providing savings, service and representation to millions of boat owners nationwide since 1966. Today, BoatU.S. is the nation's most powerful advocate for advancing the interests of boaters and acting as a single source to meet all boaters' needs. BoatU.S. consists of three main businesses: membership association, insurance provider and water/roadside towing assistance.

### Challenges

BoatU.S. has been a loyal Global 360 customer since 1999 when their Towing department implemented an imaging application to support its customer service needs. But it was in early 2004 that BoatU.S.' information technology department decided to implement document management solutions to support yachting members' insurance claims, underwriting, records management and administration. "It was clear to us that we needed an experienced team to design and implement these systems which would support our entire company," said Tom King, CIO, BoatU.S. "Clearly, each department would benefit from the time and cost savings of business process management systems, if it was done well from the very start."

### Solution

Global 360's Professional Service Organization (PSO) was brought in to assess and prototype a new Claims Processing application. "Our Yachting department was the highest priority, but when we met with Global 360's PSO, they said they could get our claims application up-and-running before our heavy season started. We decided to go with the Claims application first," said King.

"Our season starts around Memorial Day. That is when boaters start hitting the water in mass. That's when the claims start rolling in. It was important that we give the application to our users with enough time to train and learn the new system prior to Memorial Day so they were ready when the bulk of claims came rolling in," said Brian Owens, Vice President, IT Systems Development, BoatU.S.

Within four days of the initial meeting, PSO delivered a recommendation and a prototype with 75 percent of the workflow functionality complete. From there, PSO evaluated the existing processes, met with business users and IT people, went over the requirements, documented everything and in about three weeks delivered a working application for users to test.

"Our biggest issue was paper. Everything was paper," said Owens. "Before Global 360, when a claim came in, a manila folder was created, put in a file room or sat on an adjuster's desk. That adjuster held that paper until he was done with it. Under the new system, everything is delivered electronically right to their desktop. New items that come in on a claim via mail are scanned and immediately available on the adjuster's desktop. New items sent via fax are added to the adjuster's desktop untouched by human hands."

Once the Claims application was completed successfully, the joint team of PSO and BoatU.S. IT moved onto the higher priority Yachting department. This application was more complex because it consisted of underwriting administration and records management. The department had tried to implement document management two previous times but had been unsuccessful and resulted in disgruntled users. "Global 360's PSO group had its work cut out for them. This was a complicated application, five to ten times larger than the claims application, with high expectations from users," said Owens. "We set high standards for the team and included a penalty clause if the work was not

### Challenges

BoatU.S. needed a document management solution to support yachting members' insurance claims, underwriting, records management and administration. Their existing system was entirely paper-based, complex, and supported large processing volumes that were tied to time-sensitive deadlines for application delivery.

### Solution

BoatU.S. deployed Execute360 and Workdesk to streamline and reduce their processing time, eliminate their paper-based process, improve customer service, and improve employee production in support of their claims, underwriting records management, administration, and towing departments.

### Results

The Execute360 deployment has reduced application processing time from 2 days to 20 minutes, decreased costs across the company, improved workflow for claims underwriting and records management, and achieved project budget and time deadlines.



## Case Study: BoatU.S.

---

done on time. This team was so professional, that clause was never in danger of being used."

### Results

"The first day the application went live, we heard from one of the users saying she completed a claim from start to finish in 20 minutes. It would have typically been a two-hour turnaround," said Chuck Seward, Manager, Digital Imaging Systems, BoatU.S. Even if that was a simple claim, the company still estimates huge time savings on each claim processed. Considering that the company supports 240,000 insurance policies, there are significant savings for the company and its customers.

The virtual folder has been a big boon for workflow, improving processes. For example, there's no question as to whether somebody has received a folder because when they pick up that piece of work, they have it virtually and they can see everything else that's associated with it. And that one piece of work can be routed on without locking up everything else.

Overall, it was a very smooth process. "Our joint team delivered the product in three to four weeks. We tested for maybe two weeks and then it went live. It was quick because we had to be quick. We had to meet the deadline and we did it," said Brian Owens, Assistant Vice President, BoatU.S.

"The PSO team's ability to learn our business processes so quickly was amazing and was a key reason for our ability to deliver the project quickly," said Owens. "The quality of people and their experience with insurance applications were definitely reasons for our success. The team was so easy to work with. They were open. They listened. They really took everything we said to heart. You could tell that they cared about what they were doing."

"Not only were they able to answer yes to questions that had been answered no in the past, but it was yes, I could do it one of three ways and if you give me overnight, I could probably get you a couple of more," said Seward. "They had our best interest at heart."

"Global 360 is the standard for imaging and workflow at BoatU.S. They are imaging to us. There is nothing else," said Seward.