



Case Study: Western United

Customer Overview:

Western United, based in Irvine, California, was formed in response to the growing need to provide drivers with more accessible, reliable, and affordable automobile insurance coverage.

Purchased by CSAA (Triple A) in 1999, and insuring more than 150,000 drivers, Western United is one of the region's most active and secure mid-size automobile insurance carriers. Western United offers a variety of coverage, providing policies for people with good driving records as well as for people whose records are not so good. Regardless of your driving history, Western United believes in putting auto insurance within your reach.

Global 360 Professional Services Partners with Western United

Challenges

Western United has been a Global 360 customer since 1997. In 2005, Western United turned to Global 360's Professional Services Organization to evaluate their business processes and review their needs for the future. The existing workflow application was highly dependent on Exchange, was built in custom code, and could not support remote users. The application was not robust enough or enterprise-strength.

The business has grown very rapidly, adding four to six new states to the service every year. The company has seen the volume of documents grow significantly as new customers are added. It follows that the level of service must improve even as the number of customers increases. "Global 360 is a key component to our company's ability to maintain a high service level," said Joan Liu, Supervisor, Imaging Team, Western United.

Solution

"Using the Execute360 and WorkDesk solutions from Global 360, PSO redesigned our entire workflow," said Joan Liu. "Our claims department was the initial project and underwriting followed after that. These departments represent the company's two largest business units and as a result of their success with Global 360 the whole company is now on WorkDesk."

The professional services team supported the entire life cycle of the project, including user requirement gathering, design of the system, prototyping, user feedback, implementation, and training. "Global 360's PSO team was highly valuable during the implementation and training phases of the project. We included management at every opportunity to preview the system or view the implementation. By the time we delivered the system, we had their buy-in and it made the transition from the old system to the new one very smooth."

The Western United's imaging team, supplemented the Global 360 PSO team and the entire group is coordinated by the Supervisor of the Imaging team. "Every person brings a specialty, expertise, and background knowledge. It is most definitely a joint effort," said Liu.

"Growth and durability were the two things we had in mind when we designed the new system," said Liu. "That's why we decided upon a multi-domain solution. At our main office is the main domain, and then we have child's domains in Las Vegas and also one in Colorado. Our ability to support users in multiple locations is a huge advantage of the system."

With the new system, they push work items to their local domains so that they don't suffer from any performance issues. Previously, accessing documents from a remote location took a long time,

Challenges

Faced with significant customer growth, Western United needed a process and document management solution to help them support multiple locations and remote users, achieve platform flexibility for the future, and maintain premier service levels.

Solution

Western United deployed Global 360 solutions to automate their manual claims and underwriting processes, route work to the appropriate individuals and departments, and lower the cost or processing claims.

Results

Western United reduced costs for processing claims, improved processing performance for their claims and underwriting departments, and improved customer service during a significant growth period.



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and users would see performance problems. Now, this is not an issue. The company can support existing needs and is prepared for future requirements.

Results

The transition to the new system was a success. There was minimal downtime and there was an increase in productivity because a lot of manual processes were automated in the new system. For example, emails from vendors are now automatically imported into the system, directly from inboxes. Files from vendors are also automatically imported into the system from network drives. Automating manual processes reduced a lot of effort, increased accuracy, and resulted in cleaner data.

Western United was acquired by California State Automobile Association (CSAA). The Global 360 Execute360 business processing solution is being used throughout the country. "The flexibility and scalability of Global 360 has been a key factor for success. We have a lot of claims users in the field currently and that will become more abundant in the future. Global

360 will need to handle multiple locations, a large number of users, and scale to support their needs." said Lui

"We considered Global 360's PSO as the ideal way to evaluate and redesign our workflow and business processes, for both the claims and underwriting departments, because of their experience with the product and knowledge of the industry. Global 360 offered a lot of options that our internal team may not have thought of, such as getting the management team's business goals into the initial design of the system. They have done a fantastic job." said Lui

"It is important to satisfy the users by providing functionality that bridges the old and the new systems. We did not want to lose anything that was valuable in the old system and by combining our teams we could focus on delivering new redesigned services while maintaining the value of the existing system," said Liu.

Global 360 is the second biggest system in the company. It is critical to the business.