

## Mutual Assurance Society of Virginia

// case study:

### NEW BUSINESS PROCESSES LEAD TO INCREASED EFFICIENCY

Mutual Assurance Society of Virginia (MASVA) has a long and rich history of providing the citizens of Virginia with quality insurance protection. In their more than 200-year history, they have managed to survive the American Civil War, two World Wars and the Great Depression. Along the way they never once wavered from their original mission. In keeping with their customer-focused mentality, MASVA continuously looks to improve the quality of their products and to increase efficiency through process improvement. One recent process improvement is the adoption of document management technology. Today, MASVA has successfully improved the way they handle their paper-based business processes and increased their speed and accuracy, leading to faster turnaround time and improved customer service.

#### A Farewell to Old Ways

Before 2006, MASVA's underwriters were processing their work the same way they had been since the 1700s. They pushed paper and mailed documents. "We were experiencing a 30-day minimum turn around on new business and a 15-day turnaround on endorsements," said Jeffrey Wrobel, Information Systems and Services Manager with MASVA. "Our process was very paper intensive and even though we were imaging some of our documents we were still manually faxing or mailing them to agencies and printing all inbound faxes to be distributed manually."

MASVA knew there had to be a better way to manage this aspect of their business. After reviewing some options they decided to work

with OnBase and KeyMark Inc. for their workflow and document management needs.

"We picked OnBase and KeyMark because we needed more capability than what others were offering," Wrobel explained. "We wanted a system that would allow us to automate all areas of our organization – Underwriting, Claims, Human Resources and Accounting. We felt OnBase and KeyMark together offered the most robust solution."



#### Positive Results

Since system implementation, MASVA's turnaround time for new business has gone from 30 days down to between 15 and 20 days and endorsements (policy changes) are down from 15 to five to seven days.

There are other benefits, according to Wrobel. "We've used OnBase workflow to automate our entire operation from Claims and Underwriting to HR, paid-time-off tracking, time-sheet tracking, as well as accounts payable invoices," he said. "We also use OnBase to communicate with our field agents and to e-mail paperwork."

"Prior to implementation, accounts payable invoices took a week to a week and half to process. Now invoices are processed in three days or less," comments Wrobel. "Using workflow, our staff is

### Mutual Assurance Society of Virginia at a Glance

The Mutual Assurance Society Against Fire on Buildings of the State of Virginia was founded on December 22, 1794 by an act of incorporation by the Virginia General Assembly. On May 17, 1982 the members of the Society changed the name of the company to "Mutual Assurance Society of Virginia". Today the Mutual Assurance Society of Virginia operates much the same way as they did in the beginning. They provide members with quality insurance protection at a reasonable cost always striving to do so in a caring and efficient manner.

#### Modules and Technology in Use

- o Thick Client
- o Workflow
- o Eforms
- o Desktop Imaging
- o Document Import Processor (DIP)
- o OCR by AnyDoc
- o App Enabler by OnBase
- o Outlook Integration
- o Beyond the Ledger

able to e-mail documents automatically, receive faxes via e-mail and send faxes directly from their desktops.”

### A One-Step-at-a-Time Approach

To ensure the success of the technology adoption, MASVA rolled out the solution gradually and over the course of six different life cycles. They began with workflow and gradually layered in more technology. This phased approach gave them a chance to look at each step in each process so changes could be made where needed on an implementation-by-implementation basis.

### Everything Is Connected

Tightly integrated technology is an integral part of MASVA's new found efficiency. OnBase is neatly tied to MASVA's prospect and policy systems. Scanning has been adopted company-wide and Eforms have taken the place of paper. OnBase is also fully integrated with Outlook, Word and Excel. This tied-together quality allows MASVA employees to work smoothly across systems without jumping from one to another.

### Beyond the Ledger

In their Accounting Department, MASVA is using Beyond the Ledger (BTL), an accounting solution developed by KeyMark that ties directly into Microsoft's Great Plains technology. With OnBase workflows and BTL, invoices are now scanned by Accounting as they are received. They are then coded into OnBase and from there, with the push of a button in OnBase, the invoice is sent to Great Plains in the form of a voucher. The invoice is routed to the proper approver in workflow. When the invoice is approved, additional information is added. The invoice

is then sent to be paid. Once paid, the invoice information in OnBase is synchronized with the voucher information in Great Plains. The result is seamless integration between business processes and document management (See graphic below).

The BTL solution has proven its value at MASVA. “With the Beyond the Ledger integration with Great Plains, one button allows us to pull up an invoice in OnBase, which is really invaluable. When you're looking at a payment and wondering what it was for, all you do is click a button and there it is,” states Wrobel. “It's such a simple application. Its functionality is really simple and that's the beauty of it. It passes data back and forth but it's transparent. It just happens.”

### To the Next 200 Years

“I would describe our document management system today as very robust and agile,” reflects Wrobel. “MASVA is very satisfied with the implementation. No more paper. We've reduced our use of paper for printing by 50%, we've reduced our fax costs by 50% and we've improved our cycle time for new business by about 15 days. Even though we haven't formally measured our ROI, we've saved a significant amount of time and now have much more efficient processes. If you build the right work process ROI will come,” comments Wrobel.

By establishing a partnership with KeyMark Inc. and Hyland, MASVA had access to the toolsets and expertise needed for a successful implementation. On their end, their knowledge of their business and how they needed their information to flow was and is paramount to the success of their document management system. MASVA's focus remains on process improvement.

