

Bravo Insurance Agency

The Challenge

"For years, I've been searching for a management system that would work in and out of the office," said Domingo Bravo of the Bravo Insurance Agency. "I have two locations, and I wanted them both on the same system so that I could consolidate all of my paperwork, capture unlimited notes, images and documents and generally make life easier for me and my staff."

Bravo was using eBridge's document management system to store and manage the agency's paper and electronic files. "We initially chose eBridge because they were a corporate-approved vendor," he explained. "I knew eBridge had already gone through a pretty rigorous pre-screening and approval process, so I wasn't worried about the security of our documents or the reliability of the web-based service."

Happy with the value that hosted document management brought to his agency but still looking for more, Bravo contacted eBridge CEO Leslie Haywood to see if his agency could add even more features.

"We were getting more and more inquiries from agents about integrating eBridge's document management system with other agency management systems. So, after speaking with Domingo, we decided to develop our own," Haywood said.

The Solution

Since Bravo was instrumental in defining the needs for an easy to use, yet effective agency management system, many of his agency's proven best practices were used to develop and test the final product offering.

Bravo Insurance Agency

- Background:** Established in 1988 (Miami, FL)
Multiple office locations
52 file cabinets and growing
- Challenges:** Documents stored in multiple locations
Customer/policy detail in separate systems
- Result:** Consolidated customer information
Increased efficiency in marketing and sales
File rooms converted into producer offices
Access to all customer information online



Building your database

Getting existing customer and policy information into eAgent is simple. "We simply requested our books of business [BOBs] from the different insurance carriers we work with," Bravo explained. "The eBridge team imported those BOBs for us and we were able to start using eAgent right away."

Maintaining your database

Going forward, eAgent is able to use nightly downloads directly from our carrier [through IVANS] as a way to keep staff from manually entering customer or policy information," Bravo explained. "If we need updated information before the download occurs, we log into company's web sites via the Quick Links from eAgent. That's where we get the most up-to-date information."

Day-to-day efficiency

The first thing employees do when they come in each morning is log into eAgent. "eAgent is the first place my staff looks when a customer calls in," Bravo said. "In one place, we can verify contact information, add comments or record new XDates."

Policy Reviews: When an agent or CSR conducts a customer policy review, they can instantly add notes and comments into eAgent. If a mailing or e-mail address needs to be updated, they can do it right online while the customer is on the phone. All of the notes include a date and time stamp.

New Business: When employees write new business, they enter information into the customer and policy screens once, and it is

immediately added to the production log. Scanning in customer documents is made easier because index values are populated based on the information found in their records.

Using reports

Many agents feel that eAgent's reporting capabilities offers the most tangible benefit. Agents can run cross-sell reports to show which customers have homeowner's policies with them, for example, but not auto. They can also pull up Xdates, birthdays and anniversaries for further marketing opportunities. Reports also allow agents to track productivity and referral source or marketing/advertising effectiveness.

The Result

Bravo's employees were very receptive to eAgent, mainly because it was easy to understand and implement. "Before eAgent, they were creating reports in Excel spreadsheets to track their production," he said. "Now, we can track productivity by agent, CSR, branch or even policy type."

eAgent has freed up time, space and money for the Bravo Insurance Agency. "I used to have about 200 square feet in my

office for a filing room that housed 50+ file cabinets. This room is now occupied by two new producers thanks to eBridge," Bravo said. "I also used to have a 30-hour-a-week filing clerk. I've been able to turn her into a 16-hour-a-week filing clerk with this new system."

Happy and efficient employees mean happy customers. "Since anyone answering the phone can instantly pull up customer or policy information, our customers are getting their calls handled quickly," Bravo said. "I'm getting more productivity out of fewer employees, too."

About eBridge

Since 2001, eBridge has helped businesses eliminate the waste, risk and inefficiencies of paper-based records and processes by digitizing and storing documents in a central online repository. Web-based file cabinets allow users to securely access documents from any computer with an Internet connection. To explore what eBridge can do for your business, visit us online at www.eBridge.com to read more case studies, or contact one of our industry experts at info@eBridge.com or (877) 676-6067.