

Carnegie General Insurance Speeds Time-to-Close by 17% with HelloSign

Improves producer workflow, delivers final insurance policies faster, increases speed in processing applications and policy issuance



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Bob Negrey, VP of Information Technology



17%
Faster time to close sales



700+
Hours saved annually

Challenge

Carnegie General Insurance Agency (CGIA) has hands-on experience in all phases of the automobile insurance business, including claims administration, product development, and program analysis. Working with producers - independent insurance agencies - their insurance application process was traditionally dependent on a print-sign-scan-fax / email workflow to generate final policies.

“The producers’ workflow was significantly impacted by the two or three days it took to get a legally binding signature on new insured applications finalized and into our content management system (CMS),” Bob Negrey, CGIA’s VP of Information Technology, shares. “We had to automate this process to deliver the highest quality customer service to insureds, producers, and carriers.”

To speed the producers' workflow, Bob's team chose to integrate DocuSign into their EZ PASS product for electronic application submissions in 2013.

"We integrated DocuSign in about six months, but we were dissatisfied with the time-consuming and awkward renewal process. With DocuSign, we had 2X cost increases that weren't correlated to usage or features," says Bob. "It was dissatisfying given all the work we put in to make it work."

Solution

"In 2016 CGIA evaluated Adobe Sign and RightSignature, but quickly identified HelloSign as the ideal long-term partner to enable them to improve quality of customer service and speed up legally binding transactions.

"What I like most about HelloSign is that it provides an equivalent level of functionality, is more affordable compared to DocuSign and other eSignature solutions, and it provides an enhanced mobile end user experience", says Bob.

The transition from DocuSign to HelloSign was straight forward. "It was a two month process from migration off DocuSign to pre-production testing with HelloSign. It was seamless to our producers and insureds. They didn't know that we were going to a new vendor," says Bob.

He adds, "Compared to DocuSign, the HelloSign renewal process is easy. HelloSign stays current on technology trends which is a benefit passed on to CGIA. In fact, HelloSign's modern approach has helped CGIA move forward in some of our internal technology goals."

Benefits

Delivers Final Policies 17% Faster, Reduces Time to Close Sales

HelloSign has been a facilitator of CGIA's digital transformation which has had a positive impact on sales revenue. Miguel Huizar, producer for CGIA shares, "With HelloSign we're able to close sales about 17% faster compared to the manual signature process.



CGIA specializes in non-standard auto insurance and provides coverage for a full range of personal and commercial line products such as motorcycle, collector automobiles, watercraft, and more. Working directly with insureds and producers they develop products that are responsive to the needs of the consumer.



Founded: 1988

24: Average years of industry experience of senior management team

7-10: Technology partners, like HelloSign

"HelloSign's seamless signing experience has allowed us to deliver evidence of insurance in real time and we've seen a reduction in the time it takes to close a sale. HelloSign has become a necessity for our business as online shoppers demand a hassle-free way to buy."

Workflow Optimization Saves 700 Hours per Year

The HelloSign API integrates into two CGIA applications – Carnegie EZ PASS and their uninsured motorist waiver forms, and automatically sends electronically signed documents into their backend CMS. Before the HelloSign API integration, the traditional insurance application process required about two to three hours of manual indexing time per day to get the insured’s signed documents into the CMS.

Bob says, “The policy processing group spent about 20% of their day, say two to three hours, 240 days per year, indexing documents. By eliminating the manual indexing and getting the electronic signature in real time, we’re saving over 700 employee hours per year.”

Fuels Digital Business Transformation and Quality of Service

Throughout its 30 years in business, CGIA has always leveraged technology and has made great strides in developing a successful digital business model. Today, they’re one of the few insurance businesses leveraging eSignatures in their market, which has improved competitiveness and enabled their network of producers to identify more opportunities.

Compared to the traditional process, CGIA’s digital transformation journey has enabled them to reduce a two to three day process to just a few minutes, improving the service they deliver to both producers and insureds.

What’s Next for CGIA?

“The efficient producer workflow we’ve enabled using HelloSign gives us a solid foundation for transforming other areas of our business to digital processes. We plan to expand eSignatures to underwriting, and claims processing, as well as partner and customer onboarding,” says Bob.

Interested in Enjoying Results Like CGIA? Ask Us About HelloSign!

HelloSign is the easiest way to send, receive, and manage legally binding eSignatures for business. Learn about our industry-leading API by looking through our [developer documentation](#) or build and test for free by creating a free developer account. If you’d like help figuring out which HelloSign product is best for you, [schedule a demo](#) with HelloSign’s API team to see how we can streamline your business.