

How a Commercial Auto Claims Company Cut Document Processing Time by 86%

Powered by Cloud Maven, Inc Secure File Transport

\$400K

Annual Savings

Estimated annual cost reduction

86%

Faster Turnaround

Claim preparation reduced from 7 days to 1 day

80%

FTE Reduction

Document-processing staff reduced from 10 to 2

CLIENT & PROCESS CONTEXT

Our client, a leading commercial auto claims and workers' compensation management company, experienced substantial delays with respect to claim adjudications and payments. The call center representatives (CCRs) processed and managed eight different document types submitted by claimants, including driver's licenses, vehicle registration, policy information, police or accident reports, invoices/estimates/proof of payments related to repair, towing, storage and appraisals, and bank details for ACH or direct deposit.

CCRs assisted claimants with gathering information for their claim, creating claims in the Salesforce Claim Management System, issuing claim numbers, and advising claimants what additional documentation they needed to gather and how to fax those documents. The manual process of downloading, reviewing, tagging, indexing, and uploading documents to the corresponding claim accounts was time consuming and prone to errors. Also, claims would be transferred to an adjuster only when all required documentation had been received, reviewed, and uploaded.

THE BUSINESS CHALLENGE

Document management at the company was heavily dependent on manual work performed by call center representatives. When claimants called to start their claims process, the CCRs collected information, created claim records in Salesforce, and then spent considerable time to get faxed documents, review content, apply metadata, index files, and then upload materials to the correct claim accounts.

These time-consuming activities created bottlenecks throughout the claims pipeline. The specific challenges experienced by the client included:

- A total of 10 full-time staff members worked exclusively on performing document-related tasks.
- Claim preparation would consume 25 minutes per claim, with 200 claims processed each day.
- On average, each claim was placed into a "holding" status for 7 days prior to being transferred to an adjuster.
- CCRs spent considerable amount of time in pursuit of claimants who missed or did not submit documentation needed for their claims.
- Files submitted to CCR were sometime sent to incorrect accounts or mislabeled despite successful receipt.
- Inbound files locally stored on CCR machines caused compliance risks and exposed the company to potential data breaches.

WHY CHANGE WAS NEEDED

- 1 Resource intensive**
10 FTE dedicated to document processing & claim preparation
- 2 Slow claim preparation**
25 minutes of manual document work required per claim
- 3 Long turnaround time**
Claims on hold for an average of 7 days before adjuster review
- 4 Manual errors**
Documents were mislabeled or linked to wrong claims.
- 5 Security and compliance risk**
Files stored locally on devices increased data exposure

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THE CLOUD MAVEN, INC SOLUTION

Cloud Maven, Inc implemented Secure File Transport solution to transform the way documents were collected and processed. It took out all of the manual processes that consumed the majority of CCR's time and added intelligent automation to every aspect of the document's lifecycle.

CORE CAPABILITIES

- **One-Click Document Collection:** Initiate document requests directly from the Salesforce Claim Record.
- **Secure Digital Upload:** Claimants receive a secure email or SMS link to upload required documents.
- **Automated Classification:** Documents are automatically assigned & tagged to document type based on intelligent envelope configuration.
- **AI-Powered Routing:** OCR, AI, and metadata route submitted documents to the correct claim account.
- **Automated Claim Progression:** Completed claims automatically move to adjuster review with stakeholder notifications.
- **Real-Time Image Validation:** Image authentication technology, such as Truepic, verifies claim photos and helps identify fraudulent submissions.

IMPLEMENTATION APPROACH

The deployment was planned to ensure that there would be no disruption in the workflow when transitioning from manual to automated process.

The team at Cloud Maven, Inc worked closely with the client to configure document upload templates, establish notification protocols, and train CCR staff on the new streamlined process.

With this solution, what once had been a multi-system, manual, and weeks long document processing task was now an automated document collection process initiated directly from Salesforce claim record.

BUSINESS RESULTS

Our solution has changed the way our client collects documents and prepares claims. It moved the organization away from a labor-intensive manual process to automated document handling that produced measurable improvements.

\$400K

annual cost savings

7 days to 1 day

claim preparation turnaround

10 to 2 FTE

document-processing staff

- Customer status inquiries dropped by **90%** due to automated triggers and dashboard visibility
- Secure document handling eliminated local file storage and reduced compliance risk
- OCR-enabled document classification eliminated routing errors and mis-categorization issues
- Real-time image validation helped identify manipulated or fraudulent submissions earlier

Learn more: solutions@cloudmaveninc.com | +1 (740) 470-0000 | [Book a demo](#)