



# Atlas Insurance Agency

## Company snapshot

Atlas is the largest and oldest agency in the state of Hawaii, as well as one that has been voted "the best place to work" three years in a row. Its owners are not only dedicated to the community but to professional development and coaching the next generation of insurance leaders through the University of Hawaii.

"For us, WorkSmart opens up many more avenues for exponential efficiency gains."

Kathy Kano,

Executive Vice President, Atlas Insurance Agency

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## Vertafore® Solutions: WorkSmart®

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### Proven results:

- Increased certificate issuance by 30%
- Enabled agency to explore back office offshoring for additional cost reduction and efficiency gains

Vertafore® solutions help Atlas Insurance increase revenue, enhance efficiency, and position for the future.

Most people think of the Hawaiian Islands as destinations for a tropical vacation. But, for Atlas Insurance Agency, it's all business. This highly successful organization, headquartered in Honolulu with offices in Maui and on the Big Island of Hawaii, is not only the largest agency in the state, but one of the most technologically advanced.

### From Paper-Based to Standardized, Paperless Workflow

In 2009, the agency purchased Vertafore's WorkSmart®, which not only eliminated reams of paper, but, more significantly, brought intelligent workflow to the entire organization. The solution improved visibility, standardized processes, and transported Atlas firmly into the digital age.

"Before WorkSmart, we were all paper, with no best practices for document management and no repository for electronic client files," Torres explained. "We were living in a paper environment when the world was going digital around us. We needed a more efficient way to access our documents, instead of filling out a form every time we needed something from the archive."

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Atlas' management knew that gaining efficiencies would take more than implementing a new system. They needed employee buy-in to get everyone on board with the change, so the agency could realize efficiency gains faster.

So, Kano created a multi-disciplined committee for WorkSmart implementation, which included a large number of the agency's more mature users.

"We made sure our older personnel had a say, bought into the change and became emotionally involved in the project," Kano said. "They became our advocates, spreading the excitement to their peers. We had a 70-year-old woman on staff, who is now retired, that loved WorkSmart as much as our younger employees now."

The agency also formed a committee to determine where documents would "live" in WorkSmart, as well as a committee that focused on workflow. According to Kano, standardizing processes and workflow was essential to the success of this project.

"We have two generations of employees, and are missing all of those in the middle. We have young people, and people who are five years to retirement. You don't have to sell young people on technology—they're waiting for it. But, we had to find a way to get our more mature users on board."

**Kathy Kano,**  
*Executive Vice President, Atlas Insurance Agency*

"We all know that people can do the same job differently from department to department, or even within the same department," she said. "Establishing roles and workflow through WorkSmart makes us more standardized and more efficient."

## Standardized Equals Streamlined

By ensuring that everyone puts work in the workflow, Atlas can better manage individual employee's workloads, and provide help if they're falling behind on specific tasks. Just as important, the agency can now provide much-needed support for its smaller locations on the Big Island and Maui.

"Our branch locations are smaller, so there was no real backup when someone was sick or on vacation. With WorkSmart, that backup is seamless," Torres said. "The main office on Oahu can pull work off WorkSmart to help the neighbor islands eliminate their backlogs."

"Establishing roles and workflow through WorkSmart makes us more standardized and more efficient." Irlene Torres, AVP, Unit Manager, IT, Atlas Insurance Agency Atlas recently took this efficiency to the next level by moving all processing functions for a remote branch to headquarters.

"By doing the work here, in one place, we simplify employee training, streamline our processes, and solidify our stand as one organization," Torres said. "Every branch is no longer an entity unto itself."

In addition to bringing Atlas new operational options, it has also delivered some measurable results.

"We measured certificate issuance and saw a 30% productivity increase from our top issuers," Kano said. "That increase is primarily due to the accessibility and mobility of the digital documents. Account managers can flag things and send to our account assistants in minutes. That's had a big impact."

"Because there's no delay in finding documents, we can respond to our clients more quickly," Torres said. "That's a huge advantage." motor vehicle report (MVR) information tied to a particular driver's license.

### **Delivering the Right Solutions for Today and the Future**

Over the years, Atlas Insurance has brought on a variety of Vertafore solutions, not only for efficiency, but to gain a competitive advantage in an ever-changing industry.

"Having come from a national broker, I can say that, to compete, independent agencies need resources at their fingertips, because the big brokers have those tools," Kano said. "With Vertafore, we have a partner that brings the new products and services that allow us to compete. They even the playing field for independents like us."

According to Kano, these Vertafore tools, particularly WorkSmart, give Atlas strategic options it didn't have before.

"As great as WorkSmart is, people can't look at just features alone. Instead, agency

executives have to ask 'what does WorkSmart mean to the future of our agency.'" she said. "For us, WorkSmart opens up many more avenues for exponential efficiency gains."

For example, the standardized, consistent processes and workflow orchestrated by WorkSmart makes it possible for Atlas to explore outsourcing as an option for its less strategic back-office processing.

For Kano, that's what technology should do: not only support physical transactions but also support an agency's strategy.

"With Vertafore, we have the technology that enables us to respond to change, and stay competitive in the process," she said. "It gives us the flexibility to think strategically and position our agency to be successful not only today, but in the future."

**Kathy Kano,**  
*Executive Vice President,  
Atlas Insurance Agency*

**Contact Us**

**or call 800.444.4813**



999 18<sup>th</sup> St | Denver, CO, 80202 | 720.787.3950 | [Vertafore.com](https://Vertafore.com)

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