



California Casualty improves employee productivity and customer experience with Tridion Docs

California Casualty provides individuals with auto and property insurance through affinity groups, in particular in the education, law enforcement, firefighting and nursing sectors.

Founded: 1914

Based: San Mateo, California, US

Employees: 700

Solution elements:

Tridion® Docs

RWS Translation Management

Antenna House Formatter

Tridion Docs helps eliminate information chaos and ensures content consistency with efficient document management solution

California Casualty expanded rapidly – from doing business in 13 US states to 44 states – and the number of documents they had to manage grew significantly. They introduced a document management system, but after using it for a decade, their Knowledge Management Team of three was struggling with the management of 35,000 documents.

Challenges - Document overload and lack of trust

The staff was struggling to find the information they needed quickly:

- 75% of the staff felt that the information was difficult to find.
- 90% spent 30 minutes and up to an hour or more searching for information every day.

Many would give up and call the help desk instead. California Casualty had to maintain a help desk of four to address the information demand of their employees.

To add to these challenges, California Casualty's content authors ended up re-writing material that already existed, simply because there was no way to locate the right information.

California Casualty improves employee productivity and customer experience with Tridion Docs

“Adopting Tridion Docs helped me and my team greatly reduce the number of documents we curate and ensured that we could maintain consistency across all our content. It saves our staff a huge amount of time – helping them provide high-quality customer service and do their jobs more efficiently.”

Susan Lalor
Knowledge Management
Team Manager,
California Casualty

Furthermore, it was difficult to apply changes across all documents – for example, one change meant over 300 documents had to be updated, and five years later documents were being found that still hadn't been changed. Such scenarios caused a lack of trust among the employees in the information they found, failing the very purpose of their existing content management solution.

If that wasn't enough to contend with, despite the Knowledge Management Team's best efforts, there were discrepancies between the material in the 700 page printed training manuals and the information on their intranet, leading to confusion, and resulting in a huge information governance risk for the organization as a whole.

All of this had a negative impact on California Casualty's ability to deliver a great customer experience. Staff were unsure if the information they found was correct and customers were often kept waiting until staff located the right information for them.

They needed help.

Objectives – Single source of truth

California Casualty wanted to get the “right information to the right people at the right time”.

They wanted faster content creation, easier maintenance and increased usability – their staff wanted the interface to be like Google.

Above all, they wanted to reinstate the knowledge workers trust in the information they found to be accurate, timely and precise.

California Casualty also wanted to increase the productivity of their help desk representatives by reducing their call handling time, reduce queues and the abandon rate, and improve their reps talk time with customers.

They needed a content management system which would have one “single source of truth”.



California Casualty improves employee productivity and customer experience with Tridion Docs

What California Casualty needed was a system that allows content to be broken down into components, modules and topics so these can be reused in multiple places and updated easily.

The Solution – A radically new approach to content management

Initially, California Casualty looked to a web content management (WCM) system to solve their problems.

They considered various suppliers, but soon realized they needed help identifying critical system capabilities that were needed to solve their content challenges. Together with content strategy consultants, it became clear that a WCM system was not the right solution for them. The consultants helped establish the right criteria for managing business-critical information.

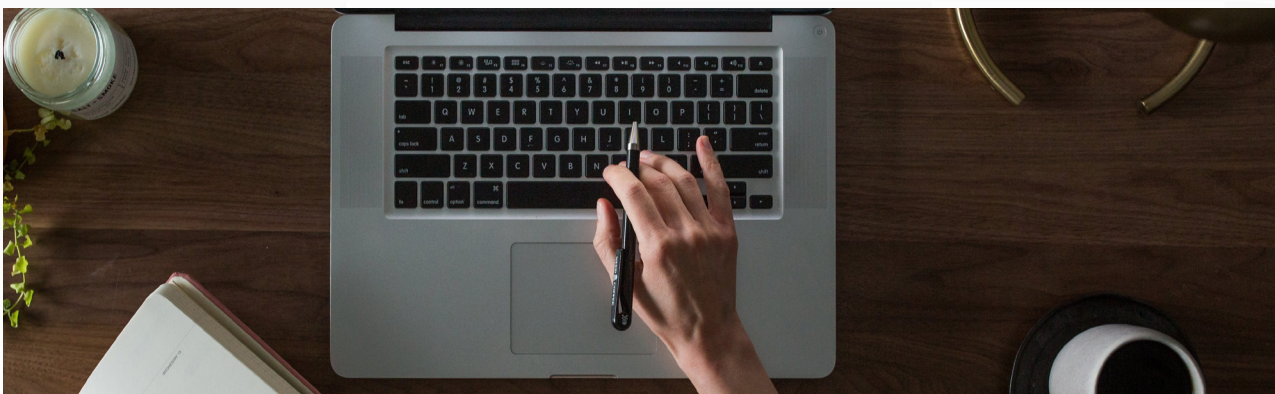
What they needed was a system that allows content to be broken down into components, modules and topics so these can be reused in multiple places and updated easily. A Component Content Management System (CCMS) based on Darwin Information Typing Architecture (DITA) allows that and more.

The vendor evaluation criteria used by California Casualty consisted of capabilities to:

1. Manage content at a granular, topic-based level.
2. Modify old topic versions automatically, even after publishing newer versions.
3. Locate existing content, both for daily use and for reuse scenarios.
4. Locate all documents where a particular bit of content is reused. This helps tremendously in updating a certain set of documents because of changes in rules, regulations or policies.
5. Isolate and compile all documents in effect within a specific time period.
6. Select a particular version of a topic at publish time.

The above capabilities are specific to a Component Content Management System (CCMS) and sets it apart from a Web Content Management system.

During the vendor selection process it became clear that only one product on the market met all their requirements – Tridion Docs.



California Casualty improves employee productivity and customer experience with Tridion Docs

Key benefits of adopting Tridion Docs

- More efficient and accurate information retrieval
- Improve the quality of information provided to customers
- Improve training through consistency of information
- Reduce the number of days to issue a policy
- Reduce coverage questions and DOI (Department of Insurance) complaints
- Mitigate risks through improved information governance

The Results – Business benefits

California Casualty chose Tridion Docs (branded as Reach internally) as an on-premises solution for centrally managing their policies and procedures. It took approximately nine months to implement the solution.

Having implemented Tridion Docs, California Casualty has been able to deliver on a wide range of business objectives:

Knowledge centralization

By centralizing their information, California Casualty has been able to unify their operations – empowering every employee with the right information to do their jobs faster and easier. They have finally established the single source of truth they were looking for.

Better employee experience

Employees are now empowered with the right information when they need it. By bringing down search time, inaccuracies, and inconsistencies, California Casualty achieved operational excellence. This dramatically improved their employee experience and employees were found to use the self-help portal independently, causing the help desk to be eliminated.

Business agility

Knowledge creation has moved from authoring at a department level to collaboration on a broader, organization-wide level. California Casualty can now involve Subject Matter Experts (SMEs) and field agents and are better able to stay on top of all the content and implement the necessary changes.

Tridion Docs enables everyone to contribute to the content creation and review process for business-critical content. Every professional in the company can collaborate with the content authors in a unified environment using a simple browser interface.



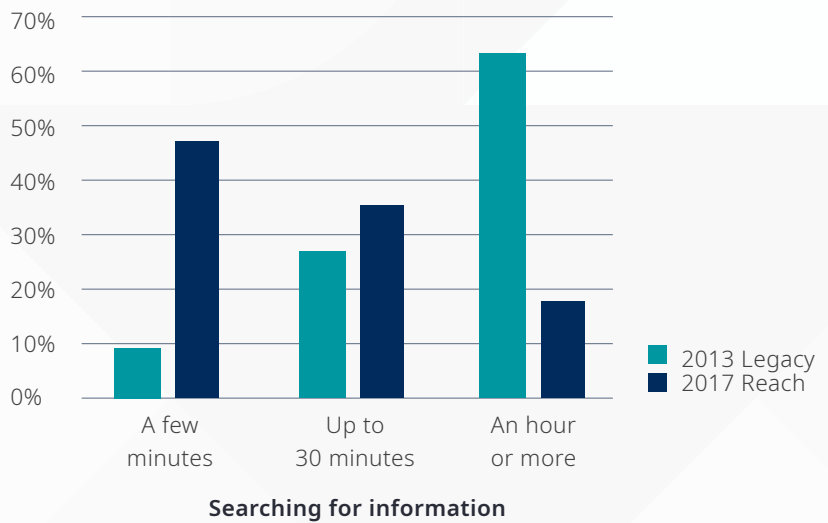
California Casualty improves employee productivity and customer experience with Tridion Docs

“Reach (the internal name for Tridion Docs) is more concise, relevant and user friendly and I am also impressed at how often it is reviewed and how quickly feedback is received and updated.”

Jason R
Customer Care Specialist

The Results – Quantified

- California Casualty reduced 35,000 documents down to 6,500 documents – an 81% decrease in the amount of content.
- Their 700 page training manual was reduced to 200 pages – a remarkable 71% decrease.
- The amount of time spent searching for information dropped significantly – their four person help desk was discontinued since information findability improved by 75%.
- In addition, the quality of content navigation improved by 57% – users are now navigating to the content because there is no need to search anymore.
- Instead of a team of six people spending a week searching for everything related to a down payment percentage, one member of staff could resolve the query in a few minutes.
- On usability, interface and overall impression, staff scored Tridion Docs an average of 8.71 out of 10.



Using Tridion Docs enabled California Casualty to reduce the number of days it took to issue a policy and by making sure that staff could access the most up-to-date information, “single source of truth”, they were able to decrease the number of DOI complaints.

California Casualty improves employee productivity and customer experience with Tridion Docs

Key benefits quantified:

- 81% reduction in overall content
- 71% reduction in training content
- 75% improved information findability
- 57% improved information navigation

Commenting – A blessing or a curse?

Initially, California Casualty wasn't sure whether the commenting feature on Tridion Docs would be of any use to them. This feature allows existing content to be annotated with comments, so readers can suggest changes or indicate inaccuracies. California Casualty had concerns that it would be a free-for-all and their Knowledge Management Team of three would be swamped, becoming a de facto help desk. Or that incorrect information would be posted, confusing users.

The contrary turned out to be the case. The commenting feature was easy for users to use – much easier than having to remember to send an email to an author and digging out the right email address to send it to. As a result, information quality is now maintained by everyone rather than a few.

Reviewing information is open to the entire organization of 700+ knowledge workers versus just a handful of people as in the past. This unified collaboration, in a structured manner, has brought tremendous benefits previously unthought of.

Discover more of our customer stories:

[rws.com/customers](https://www.rws.com/customers)

About RWS

RWS Holdings plc is the world's leading provider of technology-enabled language, content management and intellectual property services. We help our customers to connect with and bring new ideas to people globally by communicating business critical content at scale and enabling the protection and realization of their innovations.

Our vision is to help organizations interact effectively with people anywhere in the world by solving their language, content and market access challenges through our collective global intelligence, deep expertise and smart technology.

Customers include 90 of the globe's top 100 brands, the top 10 pharmaceutical companies and approximately half of the top 20 patent filers worldwide. Our client base spans Europe, Asia Pacific, and North and South America across the technology, pharmaceutical, medical, legal, chemical, automotive, government and telecommunications sectors, which we serve from offices across five continents.

Founded in 1958, RWS is headquartered in the UK and publicly listed on AIM, the London Stock Exchange regulated market (RWS.L).

For further information, please visit: www.rws.com

© All Rights Reserved. Information contained herein is deemed confidential and the proprietary information of RWS Group*.

*RWS Group shall mean RWS Holdings PLC for and on behalf of its affiliates and subsidiaries.