



**Rick Nay Insurance
Services**

**Commercial
Transportation
Insurance**

AT A GLANCE:

- >> Company:**
Rick Nay Insurance Services
- >> Location:**
Corona, CA
- >> Industry:**
Commercial Transportation Insurance
- >> Business Challenge:**
Transform paperbound insurance policy underwriting process into an efficient electronic workflow
- >> Solution:**
Consolidate all insurance company data (customer and corporate) into an organized and easy-to-use information repository
- >> Results:**
Better business processes with CNG-SAFE's highly organized paperless filing

Affordable, flexible and secure electronic document management enables specialty insurer to improve underwriting process.

Cabinet NG Helps Rick Nay Insurance Services Keep on Truckin'

Rick Nay Insurance Services, a family-owned business located in Corona, CA, specializes in commercial transportation insurance for both single truck operations as well as fleets. The firm recently expanded to 8 employees, and has been a very enthusiastic user of Cabinet NG's Shared Access Filing Environment (CNG-SAFE) system for almost two years. The CNG-SAFE document and workflow software program is scalable and robust, perfect for small-to-medium businesses' (SMBs) need for flexible, customizable document management.

The insurance services industry is characterized by a great deal of information and corresponding paper documentation. By eliminating paper at its source and replacing it with digital file cabinets and folders, Cabinet NG helps address the challenge of physical storage space, misplaced documents and incorrect information that plague paper-based processes. For Rick Nay, president of Rick Nay Insurance Services, Cabinet NG was able to offer automated electronic document management that helped the insurer's

auto liability, physical damage, cargo, refrigeration breakdown, trailer interchange and general liability protection services business run smoothly and efficiently with the elimination of paper documents.

Making Electronic Document Management Accessible to SMBs

Rick Nay test drove multiple electronic management programs and discovered most other vendors could not scale and would cost his firm between \$25,000 and \$40,000 just to get started. In stark contrast, he

found he could purchase the CNG-SAFE solution for about \$1,000 per user. Rick Nay noted, "Cabinet NG looked economical, easy to use, and the base configuration included everything I needed".

Rick Nay found the files and file cabinets concept able to support the firm's

existing insurance policy underwriting processes for truck driver customers. Insurance agencies often run agency management systems software which contain all customer records, A/P, financial and paycheck programs. Rick Nay was able to ensure all this integral data was safely and easily

"With Cabinet NG there are no missing files. We can talk to customers on the phone while pulling up their files. We have received a real productivity boost."

Rick Nay, President,
Rick Nay Insurance Services

accessible using Cabinet NG's central information repository. The result was significant time savings spent accessing and maintaining customer documentation while preserving familiar filing structures. Rick Nay identified document and file retrieval in the CNG-SAFE system as the true time saver for his firm. He said, "With Cabinet NG there are no missing files. We can talk to customers on the phone while pulling up their files. We have received a real productivity boost."

Added Rick Nay, "The more we used Cabinet NG, the more advantages we gained from electronic document management. We get unlimited cabinets – it does not cost any extra to add more. We now have cabinets for our vendors, each insurance policy, HR, current customers, former customers and prospects. It is all up to date, and

"The alternative to CNG-SAFE is storing paper. If you do not have physical space for lots of file cabinets on-site, then you have to pay a document storage facility over \$100 a trip to come and get your paper files, and pay them again to retrieve them, in addition to paying them to store your papers in the first place."

*Rick Nay, President,
Rick Nay Insurance Services*

the system helps us meet compliance regulations by retaining all information from the last 7 years and instantly locating it when necessary."

Rick Nay also added: "You cannot truly imagine the benefits until you actually use Cabinet NG".

At Rick Nay Insurance Services, everyone has a scanner at their desk. The reduction of actual stored documents has been hugely beneficial. As Rick Nay observed, "The alternative to CNG-SAFE is storing paper. If you do not have physical space for lots of file cabinets on site, you have to pay a document storage facility over \$100 a trip to come and get your paper files and pay them again to retrieve them, in addition to paying them to store your papers in the first place." With Cabinet NG, the company is no

longer producing too much paper that languishes in expensive physical file cabinets.

CNG-SAFE at Work: Simple to Use and Safe for Sensitive Data

Rick Nay has been operating under extremely stringent California insurance regulations in place for the last seven years. In addition, insurance carriers typically have different guidelines. With CNG-SAFE, Rick Nay is able to access 30 plus individual insurance companies and their unique guidelines and policy procedures, quickly and easily scanning the information into a copy of an individual insurance policy.

At Rick Nay, several employees routinely work remotely. Previously, paper files stayed in the office, which limited productivity until the employee was actually in the office. Digital filing plus Cabinet NG's password-protection and access rights ensures documents are both available (locally and remotely) and accessible only to users with proper authority.

Cabinet NG is simply a safer solution for sensitive customer information that is part and parcel of insurance policy underwriting. Electronic documents are much better protected in the event of a catastrophe or break-in. Rick Nay Insurance is also protected in the event of an audit – individual truck driver's policies are organized and easily accessible, with no need to hunt down missing pieces of information.

Customer Service Always a 10-4

Rick Nay has been thrilled to discover how responsive Cabinet NG's customer service and technical support personnel are to his firm's needs. Rick Nay enthused, "These guys are fantastic – like family. The person who answers the phone often helps me and if not, then someone who can is immediately available." Rick Nay noted that Cabinet NG's famed customer service is clearly an attitude cultivated from the top down. The head of Cabinet NG, President Andrew Bailey, regularly responds to customer inquiries, as well as working one-on-one with Cabinet NG users at company conferences. Those, like Rick Nay, who run businesses themselves, fully understand the value of such an approach.

© Cabinet NG, Inc. 2007

