

# Heffernan Insurance Brokers

Case Study

**TUNGSTEN**  
AUTOMATION



## Case Study

# Heffernan Insurance Brokers Removes Barriers to Growth with Automation from Tungsten TotalAgility®

With its insurance tracking business growing by 30% year-on-year, Heffernan Insurance Brokers recognized that manually re-keying data from customers' policy documents would soon become a bottleneck. To serve more customers within its strict service-level agreements, the company worked with Tungsten Platinum Partner Windmill to streamline its document capture workflow with Tungsten TotalAgility. The company has tripled the number of documents it can process each day while keeping headcount flat—enabling it to seize every new business opportunity.

**3x**

More Documents  
Processed Daily with  
Tungsten TotalAgility

**25%**

Shorter Turnaround  
Times for Customers with  
Tungsten TotalAgility

**Zero**

Increase in Employee  
Headcount with  
Tungsten TotalAgility

“Employees who were previously spending up to 75% of their time on document processing and data entry are now spending just 25% of their time or less on these tasks.”

**Boots Del Biaggio,**  
President and CEO, QuieTrack, a subsidiary of Heffernan Insurance Brokers

## ABOUT HEFFERNAN INSURANCE BROKERS

A leading independent insurance brokerage, Heffernan Insurance Brokers offers comprehensive business insurance, personal insurance, employee benefits and financial services products.

## REQUIREMENTS

- Extract information from hundreds of insurance documents a day
- Accommodate ~30% year-on-year growth in inbound document volumes
- Mitigate business risk by ensuring high levels of data capture accuracy
- Transfer captured data to a custom-built software platform

## PRODUCTS IN USE

- Tungsten TotalAgility®
- Tungsten Transformation
- Tungsten Process Intelligence

## Challenge

Headquartered in Walnut Creek, California, Heffernan Insurance Brokers is one of the nation's largest independent insurance brokerages.

**“Tungsten TotalAgility is extremely user friendly. Getting our team up to speed was very straightforward—it only takes a couple of hours of training to become fully proficient with the new solution.”**

**Julia Klein,**  
Document Processing and  
Automation Supervisor,  
QuieTrack, a subsidiary of  
Heffernan Insurance  
Brokers

The company's subsidiary, QuieTrack, offers innovative digital solutions that help banks and credit unions save time on insurance tracking processes and enhance the borrower experience.

Boots Del Biaggio, President and CEO of QuieTrack, explains: “We work with customers across the country to help them verify that products such as mortgages are properly insured. Every day, we receive around 1,000 new insurance policies in a variety of paper and digital formats. To serve our customers effectively, we need to process that documentation quickly and accurately.”

In the past, QuieTrack relied heavily on manual work to process insurance documents. The company's data processing team would sort through paper and electronic records by hand and then key the relevant information—such as policy numbers, coverage amounts, lender names, and much more—into the company's custom-built insurance tracking system.

“In recent years, we've had great success in growing our business,” continues Del Biaggio. “With our business volumes increasing by around 30% year-on-year, it was becoming more and more difficult to get an ever-growing stack of information into our tracking platform.”

QuieTrack recognized that automation would be a highly effective way to streamline its document-driven processes. The aim was to reduce manual data entry tasks as much as possible: enabling the same number of employees to process a higher volume of documents.

“Efficiency isn’t the only advantage we saw from process automation,” adds Del Biaggio. “In our industry, even small mistakes can have a big impact on the bottom line. For example, if we were to accept an insurance policy on a property in error, then both our business and our customer could be exposed to substantial financial risk. We were confident that automation would help us minimize the chances of human error when bringing information into our insurance tracking system.”

### **Solution**

After a rigorous evaluation of several leading automation vendors, QuieTrack selected Tungsten Automation to help it transform its approach to document processing. Using Tungsten TotalAgility, Tungsten Transformation and Tungsten Process Intelligence, the company has streamlined and accelerated a key stage of its business process.

“Unlike many of the vendors we considered, Tungsten invested a great deal of time to understand our business and design a tailored solution,” recalls Del Biaggio. “Another key factor in our decision was Tungsten’s strong track record of success on similar projects in our sector. Tungsten’s proven experience in the insurance industry gave us even more confidence that they were the right choice.”

Working with Tungsten Platinum Partner Windmill, QuieTrack developed a comprehensive automation solution to help it accurately capture data from insurance documents and bring it seamlessly into its custom-built tracking software.

“The Windmill team was fantastic—they worked hand-in-glove with Tungsten and supported us throughout the development process,” says Del Biaggio. “We continue to work with Windmill to maintain and enhance the capabilities of our Tungsten solutions.”

Kate Grasman, CIO of Heffernan Insurance Brokers, adds: “Tungsten is a great partner to work with from the technical side. They have a great account manager team that supports us with questions and needs. We appreciate being able to grow and partner with such a great company and team.”

**“One of the best things about working with Tungsten is that they’re always ready to listen to our needs and have a dedicated network of partners who can help us achieve our goals.”**

**Boots Del Biaggio,**  
President and CEO,  
QuieTrack, a subsidiary of Heffernan Insurance Brokers

## BENEFITS

- Reduces time spent on document processing from 75% to 25% per person
- 3x increase in documents processed per day without increasing headcount
- 24-hour reduction in average turnaround times for customers
- Empowers employees to focus on value-added work, boosting satisfaction

Today, QuieTrack uses Tungsten TotalAgility to automatically extract data from over half of all inbound documents. With the new workflow, substantial portions of the document sorting and capture processes are now entirely automated. Rather than painstakingly re-keying information, employees simply verify that the solution has captured data correctly with a single click. At the end of the process, Tungsten Transformation transfers the information to QuieTrack's insurance tracking software for onward processing.

Julia Klein, Document Processing and Automation Supervisor at QuieTrack, says: "Tungsten TotalAgility is extremely user friendly. Getting our team up to speed was very straightforward—it only takes a couple of hours of training to become fully proficient with the new solution."

### Results

By embracing intelligent automation from Tungsten, QuieTrack has dramatically reduced the time and effort it spends on repetitive data-entry tasks. Across the company's contact center, account management and data-entry teams, the streamlined capture process frees up time for value-added, customer-facing work.

"Employees who were previously spending up to 75% of their time on document processing and data entry are now spending just 25% of their time or less on these tasks," confirms Del Biaggio. "As a result, we've tripled the number of documents we can process per day without increasing our headcount or compromising on accuracy. We recently integrated the Tungsten platform with generative AI models from OpenAI, helping us cut document processing times from one minute to just 20 seconds."

For QuieTrack, intelligent automation from Tungsten creates a virtuous cycle. Employees can now process higher volumes of inbound insurance documents faster and with less risk of error. This frees employees to spend more time on customer service and business development, which in turn accelerates growth.

"Activities like communicating with customers, building relationships and solving problems are much more rewarding than doing paperwork," says Del Biaggio. "In this way, Tungsten is also helping us to improve employee satisfaction."

Through its partnership with Tungsten and Windmill, QuieTrack is continuing to build on its success with intelligent automation. QuieTrack is currently working with Windmill to set up new document types and increase the rate of straight-through processing: allowing it to process some insurance policies with zero human involvement.

“We have already reduced our turnaround time for customers from four days to three days,” says Del Biaggio. “In the long-term, we aim to handle new requests from our customers within 24 hours, and our Tungsten solutions will be the key to reaching that milestone.”

He concludes: “One of the best things about working with Tungsten is that they’re always ready to listen to our needs and have a dedicated network of partners who can help us achieve our goals. We recently signed a new three-year agreement with Tungsten and Windmill, and we’re already looking ahead to future automation opportunities—including our accounts payable and claims handling processes.”

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## About Tungsten Automation

Tungsten Automation, formerly Kofax, is the global leader in intelligent automation solutions with a trusted legacy of nearly 40 years, with a team of 2,000+ employees in 40 countries, serving 25,000+ global customers. Our dedication to innovation and customer success has earned us industry recognition, including being named a leader in Intelligent Automation (IA), Intelligent Document Processing (IDP) and Process Orchestration by top analysts. We are trusted to help businesses gain unprecedented efficiencies and reduce costs through AI-powered workflow.

To learn more, visit [www.TungstenAutomation.com](http://www.TungstenAutomation.com)

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