

# Barry St. Onge Agency

## The Challenge

Like many insurance agencies, the Barry St. Onge Agency in Chula Vista, CA maintains insurance products for their 10,000+ policies with numerous companies.

That made it difficult for Barry St. Onge and his staff to keep up with all of their customer paperwork. In 2003, they began using eBridge's hosted document management system, which allowed the staff to store paper and electronic files online in one central location.

700,000 scanned documents later, it was easy for the staff to find a declaration sheet from 2005, but there wasn't an easy way to look up all of the policies a customer had with the agency.

"We needed a way to organize all of our documents and the policies our clients have through different companies," explained Rachel Lebron, customer service representative at the Barry St. Onge Agency. "It was time consuming to look up different policies for the same customer on the web sites of various companies."

## The Solution

eAgent, an online agency management system that leverages the power and simplicity of eBridge's document management tool, was just what the Barry St. Onge Agency needed to track details for customers with multiple insurance policies.

"It is very convenient to view all of a customer's policies in the same place. We have many customers who have policies with



different carriers, so seeing them all at once is important when providing prompt customer service," Lebron said.

"Our biggest challenge was manually importing all of our customer and policy data, since there was so much of it," she said. "But the import feature in eAgent helped us tremendously."

## The Result

Using eAgent, the Barry St. Onge Agency has been able to increase customer service and employee productivity. "eAgent is a great tool for keeping all our files organized," said Barry St. Onge. "eAgent allows our staff to save time when working with customers by putting all their policy information in one location."

"eAgent is a lot easier to use than the other agency management systems we looked at in the past," Lebron said. "We've also been impressed with the timeliness of support that we receive from eBridge and the eAgent team. We would definitely recommend it to other insurance agents."

## About eBridge

Since 2001, eBridge has helped businesses eliminate the waste, risk and inefficiencies of paper-based records and processes by digitizing and storing documents in a central online repository. Web-based file cabinets allow users to securely access documents from any computer with an Internet connection. To explore what eBridge can do for your business, visit us online at [www.eBridge.com](http://www.eBridge.com) to read more case studies, or contact one of our industry experts at [info@eBridge.com](mailto:info@eBridge.com) or (877) 676-6067.

### Barry St. Onge Agency

**Background:** Serving Southern California  
10,000+ policies  
10 employees and 13+ carriers

**Challenges:** Getting documents to one central location  
Managing paperwork for multiple carriers

**Result:** Easier access to customer files  
Increased customer service  
Easier management of client policies