

## Using the AUGIE Workflow Timer



Use these tools to gather consistent information on the time it takes to service your customer and see how a more efficient workflow using real time and download will result in a return in your investment.

When your agency uses these tools, define the parameters of your process, so that it includes the steps in addition to your system time. Keep the Timer in the corner of your desktop to find out how much time it takes you!

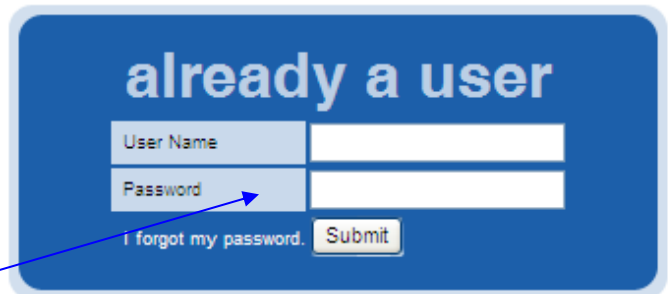
### Getting Started:

**New Users** - Please click on the pink box to get started. Your information needs to be set up once. Please use the User Name and Password you set up each time you return to the timer.



## Welcome to the AUGIE Workflow Timer

AUGIE has made this tool available for you to identify the time it takes to conduct a variety of agency-to-carrier transactions and inquiries, especially real-time versus manual. Your information will be kept completely confidential and will be aggregated with other users in summary format, to help carriers and vendors enhance their services. Thank you for using this tool.



**Already a User** - Sign in

## AUGIE Workflow Tools

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### Workflow Timer

The timer's value is in its ability to deliver data to your own agency that may be analyzed and used to make decisions in improving your workflow.

### Real Time Savings Calculator

Calculate the time and money savings your agency will realize from Real Time. You can also use the Workflow Timer data to verify your savings.

### Download Savings Calculator

Calculate what your agency could be saving if you and your carriers implemented Download. What happens when policy entry time goes away?

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#### AUGIE Leaders Council

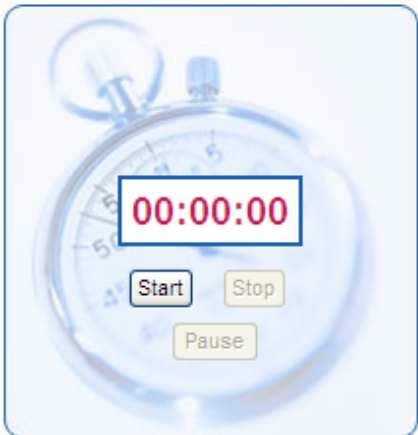


Use these tools to reach your real time and download goals.

## AUGIE Workflow Timer

### Data Collection

All information is required. Do your best to only submit times you believe are accurate for each workflow. The timer's value is in its ability to deliver data to your own agency that may be analyzed and used to make decisions in improving your workflow.

Carrier	<input type="text" value="-- Please Select --"/>	
Line of Business	<input type="text" value="-- Please Select --"/>	
Transaction	<input type="radio"/> <input type="text" value="-- Please Select --"/>	
Inquiry Type:	<input checked="" type="radio"/> <input type="text" value="-- Please Select --"/>	
Process	<input type="text" value="-- Please Select --"/>	

You may use the automatic timer or enter times manually. If you use the timer, be sure to click "Pause" if you are interrupted, then "Resume" when you return to the transaction or inquiry. If you make a mistake, you may "Stop" the automatic timer and edit the "Elapsed Time" field manually, as hh:mm:ss

Elapsed Time	<input type="text" value=""/>	(hh:mm:ss)
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[VIEW ALL RECORDED AT AGENCY](#)

Record Entry

- Select your *Carrier* from the drop down list - **For testing or training purposes select "AtestCarrier"**
- Select the *Line of Business* you are addressing
- Determine if you are handling a transaction or an inquiry
  - Transaction - click on the radio button "circle"
    - New Business - The process of entering collected information into an agency system, rating system, and carrier site or paper application in an effort to return a quote/indication. Keep in mind that non comparative systems and process should be timed separately.
    - Endorsements - The process of entering collected information as relates to a change process into an agency system, rating system, carrier site, or paper application in an effort to effect a change.
    - Renewal - The process of entering or updating client information in an agency system, rating system, carrier site, or paper application in an effort to return a quote/indication. Keep in mind that in non comparative rating systems the remarketing process should be timed separately.
    - Rewrite - The process of entering or updating client information in an agency system, rating system, carrier site, or paper application in an effort to

return a quote/indication. Keep in mind that in non comparative systems the remarketing process will be timed separately.

- Cancellation - The process of cancelling a policy, in an agency system, carrier site or paper form. If an agency is also rewriting a policy please track/note that time in the rewrite portion.

- Inquiry

- Billing Inquiry - The process of accessing billing information on behalf of a client
- Policy Inquiry - The process of accessing policy coverage or declarations pages
- Claims Inquiry - The process of accessing claim information for a specific claim
- Loss Runs - The process of accessing all claim information, policy# specific, or for a date range or line of business
- Web Login - Either the manual process of launching a browser window, navigating to a login page, entering login information, arriving at an agent portal or welcome page OR the RT process where the agency system does it for you
- First Notice of Loss - The process of gathering information and submitting a FNOL to the carrier
- Other - Any inquiry that does not match one of the previous choices

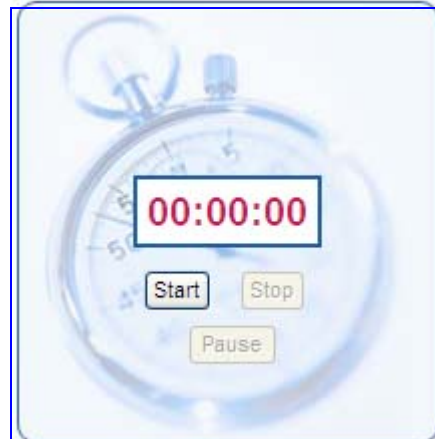
- Select the Process

- Manual: A Manual Process usually involves pulling the file, or referencing a printed copy
- Phone: Calling the carrier directly, either a service center or underwriter
- Online: Logging into a carrier website directly without the aid of an agency system or rating vendor
- Real Time Agency Management refers to real time agency management system functionality. The process begins at the Agency management system. If you are using an external rater, please see the rating definitions.
- Real Time Rating Integrated: The process begins in an agency management system and exports to comparative rater, but the comparative rater generates the **Bindable** real time quote/indication. It may gather 3rd party reports as part of the process.(e.g. MVR, Clue, Score)
- Real Time Rating Standalone (non-integrated): The process begins in a comparative rater, and the comparative rater generates the Bindable real time quote/indication. It may gather 3rd party reports as part of the process.(e.g. MVR, Clue, Score)

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- Start your Timer! This will automatically populate the Elapsed Time field.

- Or manually enter your time into the *Elapsed Time* field. (Note: if you start entering your time in this field and decide that you would rather use the timer, enter 00:00 and then click on "*Start*")



- "*Record*" your entries.
- When you want to see your results "*View all recorded at agency*". This timer will give you data that will help in your analysis of potential workflow improvements. Please run the report to see your agency's results.

Elapsed Time  (hh:mm:ss) [VIEW ALL RECORDED AT AGENCY](#)

- "**X**" to end the session, close the window. **Note:** If you close out the window prior to clicking on "Record", your information will not be logged.

# AUGIE Cost Savings Calculators



## AUGIE Workflow Tools

Workflow Timer

**Real Time Savings Calculator**

Download Savings Calculator

Home

### Real Time Savings Calculator

Agency Info

Current Workflow

Real Time Workflow

Real Time Savings

Enter information about your agency and click Save to advance to the next tab

Save

Agency Management System

Other

Internet Access Speed

Dial Up

Average CSR Cost per Hour

30

Average Hours Worked per Week per CSR

40

Average Number of Transactions per Day per CSR/Processing Staff

5

( = 105 Transactions per month )

Average Number of Inquiries per Day per CSR/Processing Staff

15

( = 315 Inquiries per month )

Number of CSR's

3

The Cost Savings Calculators have been web enabled for ease of use. After you have timed your workflows your management uses that data to calculate the savings to your agency if real time functionality is utilized.

## AUGIE Workflow Tools

Workflow Timer

Real Time Savings Calculator

Download Savings Calculator

Home

### Download Savings Calculator

Agency Info

Carrier Report

Download Savings

Enter information about your agency and click Save to advance to the next tab

Save

Agency Management System

Other

Internet Access Speed

Dial Up

Average CSR Cost per Hour

30

Average Hours Worked per Week per CSR

40

The download calculator has also been updated to allow you to enter data specific to the carrier not currently providing download functionality. This may be used by the agency and/or shared with the carrier field representative to discuss the cost of doing business.