



Eastern Aviation Takes to the Sky with FileVision

Aviation Insurance Provider in Competitive Niche Market Finds Complete Information Organization & Performance Benefits with Information Relationship Management Solution

Customer Profile

Eastern Aviation Insurance Services, LLC, founded in 2004 by Terry Britt and Robert L. "Buddy" Stallings, III, provides a complete range of insurance services to the aviation industry. The company and its leaders have deep roots in the airline industry, starting originally as Eastern Aviation Fuels in 1975 in New Bern, North Carolina. For over a quarter century, the company has been exclusively dedicated to the aviation industry. Eastern Aviation Fuels is also the exclusive marketer of Shell Aviation Fuel in the US.

Eastern Aviation represents more than 75 airplane industry clients, including large corporate flight departments, fixed bases of operation (FBOs), manufacturers, flight schools, charter companies, private aircraft owners and pilots. Located at Peachtree DeKalb Airport in metro Atlanta, Georgia, Eastern Aviation Insurance Services' brokers and staff are focused on cutting edge creativity, market relationships and superior customer service.

Business Case

Like many small- and medium-sized businesses, when Eastern Aviation Insurance Services first began operations, the main software application it utilized was Microsoft Office. Terry, the company president, came from an organizational leadership background, having previously served as Chairman of the Gwinnett County Airport Authority, the third busiest airport in Georgia as Vice-President, and as General Manager of Hawthorne Gwinnett, an FBO now owned by Piedmont-Hawthorne. Despite Eastern Aviation's smaller size in comparison to other companies where Terry had worked, he was still dealing with the same level of large, important aviation clients and their complicated insurance needs. Terry also was compelled to make his mark in the competitive niche market of the aviation insurance business.

To solve these business challenges, Eastern Aviation needed a comprehensive technology solution that would manage the company's data, documents and effectively organize the information. Always a proponent of the values of scanning and imaging paper documents, Terry turned to FileVision to address his information management needs. As a small business owner, he looked for a vendor that fit the following key requirements:

- offered an affordable solution;
- could implement the solution seamlessly with new company procedures;
- offered training; and
- provided a quick implementation of the solution.

The Solution

Implementing FileVision as the business' core technology



Founder and President, Terry Britt and Vice President, Cindy Rozar discuss Eastern Aviation's expansion and future plans for FileVision.

solution provided more benefits than Terry originally anticipated. It immediately gave the company a way to manage policy information, organize the many contacts Terry acquired from more than 20 years in the aviation industry, and obtain a handle on the growing number of documents and new customer files.

First and foremost, the FileVision solution fulfilled a new small business' need to have an affordable solution that also provided end-to-end information management. Internally, the solution also solved a major challenge found in insurance offices, which is the storing and retrieving of customer files. Aviation insurance policies stored as paper files are very detailed, and in most cases, are large, bulky and difficult to navigate due to information that is organized by multiple criteria, including serial or model number, client name, and additional equipment detail-related information. Many clients also have multiple files if the company provides insurance to them for more than one airplane, or multiple pilots under different policies.

By digitizing all documents with FileVision, which included policies, customer files, and records and merging it with the company's electronic versions of other documents and information, like email, Eastern Aviation no longer has to deal with cumbersome, thick storage files for everyday use. FileVision afforded the company the ability to quickly and readily search and track a file by any selection criteria that is available regardless of how it's stored, whether that be a model number or policy detail. The solution also proved to be a time saver and helped eliminate errors by making it easier to look up the electronic version of the file in the system and locate information in a policy.

Cindy Rozar, company vice president and long time associate of Terry's, is responsible for managing the many internal office



procedures. Prior to using FileVision, she says, "If I had a customer call with a question that required me to look up a file, I had to physically search for it in our filing cabinets, then I would have to page through several sections of each file to find the specific policy information I needed. That could take up to 20 minutes at a time. With FileVision, I can find the information I need in seconds by entering a search term. That makes a huge difference - especially when I get those typical last minute calls late on a Friday afternoon."

Another key business challenge for the company, as one of the few aviation insurance companies in the southeast, is staying ahead of the competition. With insurance policies being its only product, retaining customers at every renewal period is a crucial component to the company's stability and profitable growth. Up to 60 to 90 days in advance of a policy expiring, FileVision gives Eastern Aviation auto-alerts to update customers on renewing their insurance. This has two key benefits for Eastern Aviation and its customers. One, the client must maintain continuous insurance coverage to meet aviation standards and to operate their businesses. And secondly, Eastern Aviation has a two- to three-month lead over competitors to retain and renew a continuous flow of business with its existing customers, and more time to spend on winning new business.

Another FileVision benefit relates to the varied locations the company's most active employees find themselves in on a day to day basis. While Cindy is in the main office location most of the time, Terry is often on the road. FileVision gives Terry the ability to look up contact and policy information, update new business prospect files, and have complete remote access to his business operations from any Internet connection. This plays a key role in facilitating a continuous workflow between Terry and his employees regardless of when he is in the office.

"When I enter information about a new prospect I've just met with or spoken to on the road, I'll input that information into FileVision. Before I've even returned to the office, Cindy sees the addition to the system, obtains the necessary quote information and updates it in the prospect's file. So, without having a face-to-face meeting or a telephone conversation with her, she uses FileVision to routinely provide me with the information I need to give the prospect," says Terry.

Training and Implementation

FileVision provided Eastern Aviation employees with onsite training and step-by-step involvement in the implementation process. Both Terry and Cindy, as primary users of the software, received training, and within a quick turnaround time, went from searching for a solution that would improve their business processes to identifying new ways FileVision could be utilized beyond their initial goals for the technology.

"We needed a system that would basically replace our filing and retrieving of information and documents," says Cindy. "But with FileVision's training, every step of the way we focused on how to use the software in tasks I completed every day, which helped me to see I could use FileVision not only as an information management tool, but more as a business process in itself in terms of how I organize my goals for each day, update all aspects of client policies, communicate with Terry and handle my work."

For example, FileVision recognized that Cindy customized invoices, memos and faxes for each client every time a communication was generated. With the ability to set up standard templates, FileVision enabled Cindy to automate this process by reusing the same documents, instead of recreating them each time. She uses it for all customer-facing scheduled communications, resulting in consistency, efficiency, and a more logical, simplified work process.

Future Plans

By solving business challenges and enhancing Eastern Aviation's internal processes, FileVision also provided the company with a significant benefit - saved time - which equates to saved money, improved customer service and ultimately, increased profitability.

"Our clients are responsible for transporting influential individuals in a short period of time and often with little notice. So, when I get a call from a client who needs insurance policy details to facilitate a timely flight departure, and information they require to book a charter. I need to obtain that information immediately," says Cindy. "FileVision gives me that quick, easy access. We'll continuously look for ways to incorporate additional improvements to other company processes using FileVision."

With a growing staff and new office building expanding the company's space to 5,000 square feet in the near future, FileVision will continue to play a key role in all business process aspects - from simplifying process changes that occur as the company grows, to helping delegate new employees' responsibilities and providing additional remote access capabilities to all Eastern Aviation producers, brokers and representatives.

About FileVision

FileVision is a global software company that develops information relationship management software. Our solution, FileVision, empowers organizations to bridge the gap between digital content and paper documents by intelligently linking and matching documents and information to important data objects such as people, companies, processes and assets. Government, healthcare and financial services organizations worldwide rely on our technology to help them improve communications, enhance customer service and immediately access information and relationships within data. FileVision is headquartered in Atlanta, GA with offices in Europe, New Zealand and Australia. For more information, please visit us at www.filevision.com.



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