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Cavnac & Associates

CAVIGNAC & ASSOCIATES
INSURANCE BROKERS

Company

Cavnac & Associates

Industry

Insurance

Location

San Diego, Calif.

Number of Employees

40

Business Challenge

- + Firm needed a manageable system.
- + Other products were not easy to use.
- + Shipping documents was expensive.

Business Results

- + Firm is a paperless business.
- + Firm saves money by not shipping documents.
- + Interface is easy to use.
- + Communications are more efficient.

How Cavnac & Associates uses Citrix ShareFile to significantly reduce shipping costs

Cavnac & Associates is an independent commercial insurance broker that manages risk and negotiates insurance on behalf of its clients.

The firm has been paperless since 2003, but prior to using ShareFile, the firm had to print and mail all necessary documents because not all its clients and vendors were paperless.

In its initial search for a secure file-transfer solution, the firm tried several products. None was easy to use or manage.

It was not until Cavnac & Associates found ShareFile that it was able to stop printing and mailing documents completely. Now all clients, carriers and vendors can upload and download documents with ShareFile, saving the firm money on stamps, envelopes, overnight shipping and paper.

"All policies, endorsements, audits and certificates of insurance that we would have to previously mail are now being distributed through ShareFile," says Dahlia Tuupo, systems administrator at Cavnac & Associates. "ShareFile has allowed us to streamline our communication with our clients, carriers and vendors."