

Switching to Windward helped us **reduce the time it takes to create document templates by about 80%**. Overall it provided a great advantage to us in this competitive landscape.

—Anil Annadata, CEO, CodeObjects

CodeObjects Significantly Shortens DocGen Cycle with Windward

Summary

An insurance process management software company updated its document generation tool from Adobe LiveCycle® to the Windward Embedded Solution and **saw the time required to create document templates slashed from about 3 weeks to a mere 2-3 days**. In addition, the amount of time needed to **configure complex form generation rules was reduced by more than 80%**.

The Company

[CodeObjects](#) is a cloud-based SaaS solution for insurance process management that provides complete automation, from quote to renewal, and goes beyond the core of policy, billing and claims to include all the ancillary functions.

Founded by Anil Annadata in 2006, CodeObjects's mission is to level the competitive playing field for small- to mid-size insurance carriers.

The Challenge

Insurance applications are extremely complex. Not only must insurance companies meet state and federal regulations, they must also create hundreds of lengthy documents to send to customers. The generation of so many documents can be an expensive and complicated process.





Many smaller insurance companies do not have the technical expertise or staffing to do this in-house, so in order to meet regulatory and customer needs they rely on one of the ancillary services that CodeObjects provides as part of its InsuranceEnterprise solution: insurance document generation.

CodeObjects had been using Adobe LiveCycle to create each template. But many of the original documents they were receiving were in Microsoft® Word. CodeObjects had to convert all of these documents from Word to Adobe.

In addition, because many of the documents contained linking and dynamic fields, programmers were spending inordinate amounts of time writing complex scripts for calculators.

The Solution

CodeObjects began looking for alternatives. The technical team researched the market and discovered several Word-based document generation solutions. After downloading evaluation copies and creating sample documents, they sent CEO Anil Annadata a report with their recommendation to select Windward.

“We chose Windward because of its integration with Microsoft Word,” Annadata said. “You don’t have to be a coder to create templates. That is the most critical aspect and Windward does it great.”

“The ability to create the business rules within the document is really nice,” he continued. “Template designers create rules, for example, that say that if field A has data X, then field B has data Y. Windward has the best solution for this because it is easy to implement these rules.”

Windward offers many different forms of licensing to its OEM partners to help fit with the specific needs of their customers, and CodeObjects opted for license keys that allowed use based on report quantity.

Windward’s engineers worked closely with CodeObjects’ developers to support the integration of the solution into their SaaS product.

NEW DECLARATION EFFECTIVE 11/14/2014				ACME INSURANCE	
POLICY NUMBER	POLICY PERIOD	PREVIOUS COVERAGE	COVERAGE PROVIDED BY	AGENCY	
AUTO-00001416-00	11/14/2014 - 11/14/2015	NEW	ACME INS.	ACME Insurance Agency	
NAME AND ADDRESS OF INSURED			AGENT		
Anil Annadata 816 Cameron Cir Milpitas, CA 95035			Agent1 Smith 2600 Kenmore Ct Austin, TX 78703		
VEHICLE : BUICK/LACROSSE CX					
State	CA	VIN	2G4WC532151234567	Vehicle Use	Pleasure Use
Year	2005	Annual Miles	12000		
Coverage		Limit and/or Deductibles		Premium	
Bodily Injury Liability		\$25,000/50,000		\$614.00	
Property Damage Liability		\$25,000		\$533.00	
Medical Payments Limit		\$3,000		\$121.00	
Uninsured Motorist Bodily Injury		\$25,000/50,000		\$190.00	
Comprehensive Deductible		\$950 DED		\$47.00	
Collision Deductible		\$950 DED		\$513.00	
Rental Car Reimbursement		Yes		\$52.00	
		Total Premium		\$2,070.00	
DRIVER : Anil Annadata					
Date of Birth	01/01/1971	Date Licensed	01/01/1990	License Number	D1383138
Marital Status	Unmarried	Gender	Male		
Accidents / Violations					
Type Code		Date			
FAILURE TO OBEY PEACE OFFICER		05/28/2013			
CLAIM DUE TO COMPREHENSIVE		06/23/2013			
CLAIM DUE TO COLLISION		03/26/2013			
POLICY PRICING DETAILS					
TOTAL BY UNIT		\$2,070.00			
POLICY FEES		\$16.80			
TOTAL TERM PREMIUM		\$2,086.80			
POLICY DISCOUNTS					
Passive Restraint Discount					

A sample insurance document that CodeObjects created with Windward.



The Results

Since implementing Windward, CodeObjects has saved quantifiable time in key document generation processes, benefiting both the insurance solutions provider and its customers.

- **Faster document template creation by about 80%.** Annadata notes that prior to Windward, it would take an average of 3 weeks to create a single template. That process now takes roughly just 2-3 days.
- **Faster, less complicated dynamic field creation.** The time needed to configure complex form generation rules was *reduced by more than 80%* because of AutoTag's built-in tags and equations.
- **Faster customer deployment by roughly a factor of 3.** Annadata estimates that prior to Windward, customer deployment took an average of 1 month. Today, deployment can occur in 5-10 days.
- **Shorter customer learning curve.** Customers are able to *learn the Windward tool by about 70% faster, on average, compared to the Adobe product.* Not only do customers save money because initial template development costs are lower, but once the system is live, customers can modify the templates themselves in a familiar Word-based interface, further saving time and money.

“Switching to Windward helped us tremendously,” Annadata summed up. “Overall it provided a great advantage to us in this competitive landscape.”

About Windward

For businesses in document-intensive industries, Windward Studios is the document generation and reporting software company that empowers business professionals to create beautiful, professional reports. Create custom reports with Microsoft Office as your design tool and a Java or .NET engine that connects to virtually any data source. Windward has been delighting customers since 2004.

Add Reporting and Document Generation to Your Software Application

[Download a free trial of Windward's products](#) or [request a live demonstration](#).