

# Member Satisfaction with eDocs

## 2017 Survey Results



### The Survey Results Are In!

CSIO would like to thank everyone who took the time to go online and complete the *How satisfied are you with eDocs?* survey. We received great feedback from members across Canada, enabling CSIO to continue ensuring that eDocs meet your business needs. This overview will provide you with some highlights of the survey results.

### About the Survey

The volume of eDocs sent annually has grown by 45% since 2015.

The purpose of the survey, conducted in the Summer of 2017, was to obtain member broker, carrier and vendor feedback on CSIO eDocs, including member satisfaction and areas for improvement and growth. In particular, the survey provided valuable information on carrier best practices for sending eDocs, minimizing inefficiencies for brokers going forward.

### Key Findings

#### Satisfaction:

- *How Satisfied are you with your eDocs experience?* More than 85% of brokers ranked their satisfaction of the eDocs experience as “Satisfied” or “Very Satisfied”.

#### Top benefits of eDocs identified by brokers:

- 84% - Less paper
- 83% - Time and cost savings
- 72% - Increased broker productivity

#### Opportunities for growth:

20% of brokers who receive eDocs *are not set up to do so* with all available carriers.

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### Desired eDocs enhancements:

- Commercial lines eDocs
- Insured copy
- All policy docs sent as eDocs, including: cancellation and reinstatements, first notice of loss, underwriting memos, billing statements, and lienholder copy
- Standard description for naming of eDocs. Based on survey feedback, CSIO has updated its eDocs implementation guide for carriers to address this practice, including that the eDoc description contain (at minimum) the following three fields:
  1. Document type,
  2. Customer name, and
  3. Policy number.

### Other point of interest:

- 96% of members agreed that commercial downloads would improve the efficiency of commercial eDocs

### Prize draw winner:

- Winner of \$100 gift card prize draw is:

Sydni Felice  
Assistant Advocate & Owner  
ALIGNED Insurance Inc.

Congratulations, Sydni!

**CSIO thanks all its members for taking the time to complete this survey, and looks forward to working with its members to implement their feedback and suggestions on improving the eDocs standard.**

We welcome your feedback:

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