

*Real-world agency results*

# USAA Elevates the Member Experience, Gains Insights for Growth with Veruna



One of the largest insurance companies in the world, USAA maintains a relentless focus on its core mission of providing excellent service for its 13 million members. Technology plays a critical role in enabling the organization's 36,000 employees to fulfill this mission by meeting members' needs today and innovating to keep pace as those needs evolve over time.

## Business Snapshot

**Headquarters:** San Antonio, TX

**Members:** 13 million

**Net Worth:** \$40 billion

**Founded:** 1922

**Focus:** Insurance and financial services for current and former U.S. armed forces personnel and their families

## Challenge

A far-reaching initiative to optimize the member experience revealed that USAA's existing AMS, which had been implemented in the previous century, was creating significant limitations, inefficiencies, and risk. The organization also saw technology as crucial to stay competitive in the marketplace and drive business growth.

"We needed to update technology so we could become more efficient and more effective," said Gary Baker, Senior Vice President, "and really lead in the insurance space as we lean into the future."

## Solution

Exploring potential solutions involved more than assessing platform capabilities, according to Jason Haines, Associate Vice President. He was impressed by Veruna's integrated relationship management tools and detailed, real-time reporting on critical customer and business metrics. More importantly, however, he saw Veruna as a true partner who shared USAA's vision of leveraging technology and innovation to deliver better experiences for both members and frontline insurance professionals.

"We're not looking at Veruna as an agency management system," he said. "We're partnering with Veruna as a conduit to transforming our technology and how we are going to market."



## Business Impact

From mid-2020 through mid-2021, USAA worked with Veruna and integration partner Sikich to transform the agency organization. Executing a phased rollout of new technology and processes in tandem, the team captured feedback and continued to optimize at each stage.

Implementing such a transformative shift on a national scale created tempered expectations for immediate impact, Haines said, but “we are on pace for a record year in terms of financial performance.”

More importantly, Baker added, USAA is better able to meet members’ needs in an era where “you’ve got the Apples and the Amazons and the Googles driving expectations. Our industry has got to keep pace with those expectations, because if it doesn’t, it’s going to get left behind.”

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Jason Haines,  
Associate Vice President  
USAA

Does your AMS have the flexibility and innovation to deliver ideal experiences for today’s consumers—and producers—while supporting agency growth and profitability? If not, you should look into Veruna today!

[www.veruna.com](http://www.veruna.com)

### Get In Touch!

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