

# Westfield Insurance:

FROM MANUAL PROCESSES TO PAPERLESS AUTOMATION WITH ONLINE REGISTRATION

## CASE STUDY

### PROFILE

Westfield Insurance is an Ohio-based insurance, banking and related financial services group of businesses, providing commercial and personal insurance and surety services to customers in 28 states.



### CUSTOMER CHALLENGES

- Planned 250- 300 meetings each year
- Event planning process entirely manual
- Needed a cost-effective, easy to use, online registration solution

### SOLUTION

Certain Meetings helped Westfield go online with their event planning very quickly, getting them started with templates, program and housing features that make recurring events easy to replicate. Building a new registration site for specific events is now as simple for Westfield's planners as swapping out a logo on a registration form.

### BUSINESS RESULTS

- Westfield able to organize online registration approach
- Convenient, self-service software application
- Powerful & sophisticated functionality

“Technology right now is really putting everything into the palm of meeting planners' and attendees' hands. Our guests are so much more accustomed to doing everything online in terms of registering than to do it via paper. We did a lot of research when we were trying to decide on a provider. Certain just offers exactly what we were looking for...Certain Meetings is very user friendly.”

-Kristene Hawk  
Director of Guest Services &  
Corporate Event Planner  
Westfield Insurance

In 2005, Westfield's Director of Guest Services, Kristene Hawk, and Corporate Event Planner, Sara Tester, were looking for a cost-effective, easy-to-use technology solution to tackle online registration for the 250 – 300 meetings that they plan each year. Up to that point, their event planning process had been almost entirely manual. They needed an online registration application that would allow them to get started quickly and streamline their event planning process.

Westfield compared many online registration applications, but Certain Meetings stood out because of its ease of use and ability to automate the entire registration experience. “We were going from not using any kind of online products to initiating this product with our agents, and we just wanted something very user friendly. Attendees get an automatic confirmation. That was a big part of our decision as well. We don't have to do a lot of the steps that we did before. It's all automatic,” says Hawk.

Certain Meetings helped Westfield go online with their event planning very quickly, getting them started with templates, program and housing features that make recurring events easy to replicate. Building a new registration site for specific events is now as simple for Westfield's planners as swapping out a logo on a registration form. With Certain Meetings, Westfield has been able to organize their online registration approach through the convenience of a self-service software application that brings very powerful and sophisticated functionality.