

## AAA

### COUPA DRIVES DOWN RISK FOR AAA INSURANCE WITH BETTER SPEND MANAGEMENT PRACTICES



#### CUSTOMER

AAA



#### LOCATION

Walnut Creek, CA



#### INDUSTRY

Banking & Financial Services



#### COMPANY SIZE

1,001 - 5,000

AAA Northern California, Nevada & Utah is a trade association that provides its members with an array of automotive, travel, insurance, and financial products and services. The association was formerly known as California State Automobile Association Inter-Insurance Bureau. AAA Northern California, Nevada & Utah was founded in 1907 and is based in Walnut Creek, California.

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**KATHY STONE, SENIOR MANAGER, STRATEGIC SOURCING**

**Coupa:** We’d love to learn a little bit about CSAA. They’ve recently undergone a name change, right?

**Kathy:** While CSAA is still marketed as AAA insurance, we’ve split off the AAA Club travel and roadside assistance operations into a separate company. CSAA maintains a business focus exclusively on the insurance side for auto, home and other products. With the change, our goal is to expand the business coast-to-coast



#### SUCCESS METRICS

- ▶ Reduced rule exceptions from 300 to 25
- ▶ Engaged rapid company-wide adoption through intuitive interface and mobile access
- ▶ New ability to provide data to quantify savings year over year

*"Coupa gives us easy reporting and data that we just couldn't get our fingertips on before. It's been a lifesaver."*

**KATHY STONE, AAA**

across the United States. In fact, that expansion is one of the key reasons we started looking for management solutions that could help us improve our process while building the organization.

**Coupa:** So it was about having better visibility into spend?

**Kathy:** Once we saw what the tools were capable of doing, that's what got us really excited. Just being able to demonstrate that we could quantify the savings we were getting year over year was huge. Because one of the things that really gets people's attention is data and we had a great way to show it. Just with the press of a button, we could start seeing things that we couldn't see before.

**Coupa:** Was Coupa's ability to operate in the cloud important to that objective?

**Kathy:** With Coupa, our ability to use mobile devices for approvals changed things significantly. We were able to get our executives and everybody on board right away. Turnaround time for approvals and getting things pushed through the system improved immediately. And with some of the other features, like automatic escalations, we no longer have invoices just sitting in someone's work queue. Now people get constant reminders, so that is a huge benefit to us.

**Coupa:** Can you give us a sense of how much you accomplished?

**Kathy:** Well, one example I can give you is what we used to call the "just in cases". In other words, we used to manually manage a database of over 300 exceptions to the approval process and now it's reduced to less than 25. Now, we let Coupa handle that for us. While that's an enormous procedural change, the real advantage is that the entire chain of approval is much more streamlined. Now, approval chains provide so much flexibility that the system is doing the work for us.

**Coupa:** When you made the sourcing decision to move to Coupa, what were the one or two things that put them over the top of the other suppliers you were looking at?

**Kathy:** First, Coupa's SaaS service model gave us much greater control over configuration - how the system is used and how it supports the business. The ability to make little tweaks as needed without involving the IT department was a real advantage. But one of the things we like most about Coupa is the fact that they are there with great support. When I'm trying to come up with a creative way of processing something, I can always reach out to someone at Coupa to help me. And it's not like they come back and charge me every time I make a phone call. I feel like Coupa really cares about us and our success with the system.

**Coupa:** How about user adoption and ease of use?

**Kathy:** CSAA chose Coupa because one of the highest priorities we set as we were looking at different tools was ease of use. Coupa was so intuitive that with just some very basic training, people were able to figure it out and be able to do some things we've never been able to do before.

It's the ability to see more that has gotten people excited and engaged. The proof of that was that we actually got the system configured and trained everyone faster that it took to do the contract itself. It was awesome.

**Coupa:** How would you compare pre-Coupa with post-Coupa? We always like to talk about customer success and impact on the business.

**Kathy:** For us, it's been relatively easy to see results right away. The visibility has been phenomenal. The approval chains are providing so much flexibility that the system is doing the work for us. It gives us easy reporting and data that we just couldn't get our fingertips on before. It's been a lifesaver.