

Gem Young Insurance

Achieving Greater Customer Service Through Improved File Management

Company Facts

Overview

- ▶ Location: Canfield, Ohio
- ▶ Industry: Insurance
- ▶ Number of Locations: 2
- ▶ Website: gemyoung.com

Success Highlights

Challenges

- ▶ Unwieldy amount of paperwork for nearly 6,000 personal lines accounts
- ▶ Necessary client information not readily available to employees

Solution

- ▶ DocStar® Series 3

Benefits

- ▶ Seamlessly integrates with existing management software
- ▶ Makes client information more readily available to employees
- ▶ Allows service personnel to focus more on clients



Gem Young Insurance is a family-owned business that began nearly 60 years ago serving the insurance needs of Ohio. Gem Young uses DocStar in conjunction with Applied Systems® TAM® (The Agency Manager) software to manage their business. The DocStar system is integrated with TAM to provide a seamless flow of information on clients. They employ “back-end scanning” where paper documents are processed by customer service representatives (CSRs) first and then scanned and filed with automated backup for security. AuthentiDate is used to guarantee the authenticity of scanned documents.

The problem

“We have almost 6,000 personal lines accounts, and the paperwork that goes along with this many clients has been enormous,” said Leo Daprile, president of Gem Young Insurance. “We wanted a way to make the necessary information readily available at each workstation to all staff members on every client.”

“We strive to service every client on the first phone call—that’s our service standard,” said Daprile. “It’s difficult to do if all of the necessary information isn’t located in one database or in a database that appears seamless to the service personnel.”

The solution and benefits

A simple mouse click from a number of TAM screens allows the DocStar Integration Agent to retrieve a list of documents by client code or policy. “The acceptance of the DocStar system has been much easier because there isn’t a new software package to learn,” said Daprile. “DocStar feels like a natural extension of TAM.”

“With all of the information available at each desktop, it’s much easier for our service personnel to have a full picture of our clients and their activity, which makes it easier for service personnel to pick up where another left off,” said Daprile. “The DocStar system enables our key service personnel to do what they do best—service the client. There is considerably less time being spent finding documents, and this saves us money.”

Gem Young started using DocStar with “back-end scanning.” They are in the process now of revising their workflows so that they can move to “front-end scanning,” where paper documents will no longer be routed to individual CSRs before scanning. Instead, documents will be scanned first, and then routed electronically for processing and filing.

“The DocStar system enables our key service personnel to do what they do best—service the client. There is considerably less time being spent finding documents, and this saves us money.”

—Leo Daprile, President | Gem Young Insurance

“I’m very excited to see the impact once we get the ‘front-end scanning’ implemented,” said Daprile. “We have two branch offices that we will begin scanning all of their pertinent paper files in the first quarter of next year. This will give us one consistent database and allow for greater workflow standardization through the whole company.”

About DocStar

Helping businesses translate vision into action for more than 20 years, DocStar delivers a flexible and innovative enterprise content management and process automation platform. Easy to implement and use—both in the cloud and on premises—DocStar proven technology and global process expertise empowers organizations to operate at peak performance, navigate change, and grow.



Contact us for more information on DocStar products and services

+1.888.362.7827 x2735 info@docstar.com www.docstar.com