Pease-Kerr-Canfield Insurance Agency

DocStar®

Secure and Accessible Documentation Boosts Employee and Client Satisfaction

Company Facts

Overview
▶ Location: Chardon, Ohio
▶ Industry: Insurance
▶ Number of Locations: 2
▶ Website: inspartners.com

Success Highlights

Challenges
▶ Paper files consumed significant office space and employee time
▶ Customer service suffered from delays locating files
▶ Offices had to share information by sending documents via fax

Solution
▶ DocStar® Enterprise Content Management (ECM)

Benefits
▶ Boosted employee morale and productivity
▶ Improved customer service
▶ Streamlined workflows by eliminating paper document processes
▶ Expedited document search capabilities through integration with existing software

Established in 1886, Pease-Kerr-Canfield Insurance Agency is one of the largest insurance agencies in Northeastern Ohio.

Application

On average, Pease-Kerr-Canfield scans about 30 documents a day using DocStar. They employ "back-end scanning" using barcode sheets to batch file documents. Terri Dull, Vice President, Personal Lines Division at Pease-Kerr-Canfield, sites an example: "When we file renewal documents in batch, we use a separate page and a barcode sheet at the start of each document. The DocStar solution reads each barcode with the document's file name, policy number, and transaction information. Scanned documents are filed automatically according to the information read from the barcode sheet. This allows for unattended scanning and filing after hours. Our scanner can read up to 70 pages and should any error occur, the scanning will stop until it can be attended to the next business day."

They use AFW from AMS as their management system, with DocStar integrated to expedite document search capabilities.

The problem

Pease-Kerr-Canfield—like many other agencies—was being run out of their offices by paper. A sizable amount of room was lost to banks of file drawers for both active and inactive clients. This created delays in locating paper and had an adverse effect on customer service.

The Pease-Kerr-Canfield management team works between two offices. Routing paper between offices created delays and sometimes resulted in lost files.

The solution and benefits

The DocStar solution makes it extremely convenient for Pease-Kerr-Canfield to manage their departments effectively. The DocStar integration with AMS allows scanned documents to be associated with AMS files by client name, ensuring quick access to all the information for a specific account. "We do not have to open DocStar and look up items," said Dull. "We can view them quickly and easily while working within our management system."

Customer service agents (CSAs) now have "instant" access to reports and confidential records stored securely online, with none of the delays of paper routing. "We can all see correspondence in a timely manner," added Dull. "We can share information between offices online versus faxing and reproducing paper. This allows us to better manage our desks and clutter, which boosts morale, improving employee attitudes and productivity."

Dull continues, "DocStar also allows us to distribute reading material and company updates through individual online folders rather than routing paper, which saves us a great deal of time."

The DocStar solution has helped eliminate errors and omissions at

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> —Terri Dull, Vice President, Personal Lines Division | Pease-Kerr-Canfield Insurance Agency

Pease-Kerr-Canfield. "The DocStar solution allows us to store signed documents for immediate recall," stated Dull. "And with AuthentiDate to verify authenticity, we have documents which can be recognized in court for use as legal evidence."

Scanning and storing originals has reduced the cost of copying for Pease-Kerr-Canfield.

"We are anticipating a savings on copy paper and toner in the first year of about $500," said Dull. "And of course, there will also be a return on this investment through the improved productivity and staffing relations."

Dull also believes that DocStar is helping to generate more business at Pease-Kerr-Canfield. "Prompt retrieval of information means that our CSAs can answer customers questions on the first call, eliminating the need for call backs," she said. "This allows us to service more clients in a day. With improved service abilities, we expect that the "word of mouth"

and referrals will further increase our new business. In addition, we are now able to store quotes by month, so we can call each customer a year later to ask for more business."

Dull is very impressed with the attention and knowledge displayed by DocStar representatives. "They have followed through to be sure that every goal becomes an accomplishment," she said. "They are also eager to help us find innovative ways that DocStar can work for us. They are always available to our staff to answer questions promptly and fully."

In the future Pease-Kerr-Canfield wants to bring their commercial lines and life departments into the new "paperless" environment. They also want to use DocStar to manage their marketing campaigns and for quote storage.

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.

DocStar®

Contact us for more information on DocStar products and services

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