

CASE STUDY: Document Manager™ – Self Assured

Document Manager helps streamline Self Assured



Company: Self Assured

Country: United Kingdom

Industry: Insurance

Profile: Underwriters on behalf of Lloyds of London on life and accident products. Employs 13 people, working from three offices.

Key Drivers: Reduction in lost files, greater efficiency in responsiveness to client requests.

Self Assured are underwriters on behalf of Lloyds of London specialising in the broking of Life and Personal Accident Cover insurance products. The company was established in 1977 and its staff work out of three UK offices.

Self Assured was originally established to act as a conduit between the major sellers of employee insurance products and a number of Lloyds' underwriting syndicates.

Self Assured has built its business by offering a high level of customer service, with fast turnaround of quotations and insurance documentation.

Seasonal periods caused huge paperwork backlogs

Because of the business cycles of their customers, 80 percent of Self Assured's business takes place from January 1st to 6th April. This means that extremely large volumes of post are received during those months. This post would historically build up in employees' in-trays until time was found to process it all. This situation led to significant backlogs of paperwork.

Self Assured also needed to provide high levels of confidentiality for the medical records and personal paperwork that it routinely handles. There was a risk in the handling of this information (in the form of piles of paper documentation) that it could be misplaced.

The paper-based system also did not make it easy for staff to retrieve or share client files. This made it difficult to handle incoming customer queries. It could take a significant amount of time before the relevant documents and emails relating to the query could be found and customer issues resolved. All of this led to employee frustration.

Choosing Document Manager

Self Assured realised they needed to move toward automated digital document management. The system they required included a large number of specific features that were relevant to the insurance sector. They chose Document Manager because it was flexible and scalable enough to deliver exactly the solution the business required. "We took the basic building blocks that Document Manager provides, and designed a system that totally meets what we wanted. Overall it was a very fast implementation once that design was completed", said Katherine Bushell, IT Manager at Self Assured.

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“Normally this time of year, staff are pulling their hair out. We obviously still have our seasonal periods, but now the backlog can be managed”

Katherine Bushell
IT Manager

Benefits of Document Manager

- Reduction in mail backlogs
- Improved staff efficiency
- Secure retrieval of information from remote locations
- Reduced use of paper
- Enquiries can be dealt with more quickly
- Seasonal period backlogs are able to be managed
- Highlights work that is urgent

The Document Manager Solution

Document Manager has enabled the staff at Self Assured to access important information from any location, both in the company's offices and when they are working remotely over the Web, whilst also ensuring that the company's information is secure at all times. With Document Manager, Self Assured are now able to tightly control who has access to client documentation, helping them to deliver even higher levels of client confidentiality.

The Document Manager system allows all documents to be stored centrally, which means that clients now receive a more immediate response to their queries.

Document Manager has also helped Self Assured meet its requirements under FSA regulations. The software helps the company meet these by providing an accurate record of the personnel that have accessed each of its files and documents.

Prior to the deployment of Document Manager, the desks at Self Assured were routinely under large piles of post and paperwork. The Document Manager system has meant that storage space requirements have been virtually eliminated, and stationery costs reduced as links to documents can now be emailed between staff.

Document Logistix Ltd
8 Copperhouse Court
Caldecotte Business Park
Milton Keynes, MK7 8NL
Tel: +44 (0)1908 366 388
Fax: +44 (0)1908 760 672