

## Document Logistix ensures Document Management success at Covéa Insurance



**Company:** Covéa Insurance

**Country:** United Kingdom

**Industry:** Insurance

**Profile:** UK-based insurance group offering Life Insurance, Payment Protection, Commercial Insurance, Health and Household Insurance. Employs over 300 people at two main sites.

**Key Drivers:** Automated processing of inbound mail. Storage of customer files. Automation of internal filing processes.

Covéa Insurance is a UK insurance organisation operating across a number of market sectors with a range of insurance products and services for high street brokers, leading retail banks and building societies. Covéa needed help handling increasing volumes of paper mail.

### Piles of post were slowing Covéa down

Covéa receives a large volume of letters by post every day. This mail had to be opened, sorted and physically delivered to the appropriate departments. This sluggish process led to most correspondence remaining unaddressed until after midday. The postal process was a communications bottleneck that compromised Covéa's ability to meet the strict service standards dictated by FSA regulations.

Covéa decided to implement electronic document management (DM) to streamline its mail handling and distribution. The DM system was required to allow all types of documents to be captured, stored centrally, and made accessible to all users 24/7. This would enable the group to deliver to clients a more immediate response to their telephone queries and higher service standards overall.

### Choosing Document Manager

After a rigorous selection process, Document Manager was chosen to supply a DM suite to Covéa Insurance. Document Manager was selected for its reliability, ease of use and scalability.

Document Manager was first deployed in 2003 to facilitate document scanning and control within Covéa Life in Richmond.

Once the benefits of DM were proven, other members of the group adopted the system. The next installation was within the Finance team in Westbourne House, Folkestone. A subsequent deployment was made within the Financial Sector Products division of the group. It has now been agreed that Document Logistix Document Imaging and Workflow should be deployed group-wide. Document Manager will eventually consolidate all the Imaging and Workflow requirements across Covéa Insurance.

## CASE STUDY: Document Manager™ – Covéa Insurance



“Document Manager’s advanced security features control access to sensitive documents. They are only available for viewing by those nominated to do so”

**Paul Baker**  
Business Analyst

### Benefits of Document Manager

- High quality document image capture
- Retrieval of documents takes seconds rather than minutes
- Elimination of paper, freeing up valuable floor space
- Flexible administration tool delivers high levels of security
- Highly scalable modular software solution
- Improved information backup and disaster contingency
- Improved customer service and staff efficiency

### The Document Manager Solution

Document Manager provides the platform for an entirely new insurance document management system within Covéa Insurance. Covéa’s Household Underwriting and Claims areas are using Document Manager to capture and manage all daily items of post within their Service standard guidelines. This platform is being expanded to the Commercial Insurance area and then to the Broker and Financial operations.

Covéa worked with the development team at Document Logistix to produce a solution that met the specific requirements of Covéa’s business units. These tailored features included the ability to auto-save application (Excel and Word) documents into the document management system with little interaction from the user.

Other important features were integration with Covéa’s legacy systems that enabled diary entries to be created when an expected piece of post had arrived.

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