



If paper is still clogging up your customer service, you are losing customers and revenue

Removing paper barriers to great customer service

Customers don't like waiting while your staff locate documents

Customer service is a series of interactions that generate customer satisfaction, or potentially irritation, with a business. A dissatisfied customer will often move quickly over to a competitor and tell up to ten people about their bad service experience.

Old fashioned paper filing systems are a major offender when it comes to poor customer service. It simply takes a lot of time to work with paper. Paper-based systems are frustrating, slow and unreliable for both customers and staff.

A modern electronic document management (DM) system will streamline your business processes – enabling you to deliver a higher standard of customer service, on every occasion, without an increase in the number of your customer service staff.

DM software improves efficiency of staff and makes customers happy

To enable fast, efficient customer service, businesses require a document management solution that meets the following criteria:

- **Easy and fast for staff to use**
- **Makes capture of incoming customer documents fast, simple and accurate**
- **Securely stores all documents so information is never lost**
- **Makes document searching and retrieval instant**
- **Enables multiple staff to access any customer document at the same time**

A well designed document management solution will provide customer facing staff with instant access to any document they need right from their workstation. The system will be accessible through a simple, easy-to-use interface that requires little training. The system will provide tools that make the daily task of scanning and indexing large volumes of customer documents arriving by mail very simple. The solution will index and securely store those documents and it will give powerful search tools to make the retrieval of documents fast and simple, from anywhere in the business.

Enhancing Customer Service

Case Study: Sterling Insurance – eliminating the daily paper chase

Sterling Insurance, based in the UK and with over 300 employees at two main sites, operates across a number of insurance sectors. The company receives large volumes of letters each day. These were manually opened, sorted and physically delivered internally. Most correspondence remained unread until after midday, which compromised Sterling's ability to meet the strict service standards dictated by FSA regulations.

Sterling decided to implement electronic document management to automate mail handling and distribution. The DM system needed to enable the capture of all types of incoming documents, provide secure central storage and make the files accessible to authorised 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.

After a rigorous selection process, Document Manager was chosen for its reliability, ease of use and scalability. By improving document capture and enhancing business workflow across the group, this unique software has dramatically enabled the service delivered by Sterling Insurance to its customers.

Document Management for enhanced customer service

Document Manager is a powerful system for removing the paper and filing cabinets that frustrate your staff and disappoint customers. Document Manager enables you to automate the daily capture of all incoming customer documents and correspondence. The software indexes those documents as they are scanned and then stores them in a secure, searchable archive. From this moment on, those documents become instantly retrievable for any authorised user across your business, whenever they are required to serve a customer.

These documents could be anything... the customer's account record, an invoice, a delivery docket, a letter or an email. The Document Manager solution puts all those customer-related documents instantly at your staff's fingertips.

Features and benefits

- Centralised storage of all customer documentation
- User-definable indexing and folder setup
- Easy, high-volume capture of incoming documents and powerful full-text searching
- Manual or fully automated indexing using optical character recognition (OCR)
- Web-based access for authorised users
- Document annotation, highlighting and redacting of confidential content
- Instant, 24/7, concurrent access for authorised users
- Workflow capabilities for standardising invoice processing
- Integration with finance solutions for streamlined invoicing

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