



CASE STUDY

Lassiter-Ware Finds a New Way to Insure Customer Care with Alchemy

"All in all, we've been very pleased! We have great savings in office space."

Industry	Insurance agencies
Challenge	Paper-based record inefficiencies; resulting in lost productivity and wasted time
Solution	Alchemy Document Management and Web system
Results	The savings in time, money and space have been tremendous.

BACKGROUND

For almost a century, Lassiter-Ware Insurance has been providing insurance consultation and protection to thousands of people and businesses in Florida and has grown to be one of the largest independent insurance agencies in the country. The agency has built a reputation based upon integrity and expertise in fulfilling the insurance and risk management needs of clients. The innovative methods of the agency's digital and paperless organization allow agents to manage risk and benefits programs for the nation's largest commercial enterprises.

THE CHALLENGE

The Errors and Omissions Reviewer for Lassiter-Ware Insurance, Nancy Burton, is responsible for training employees on how to better manage customer records, known as "reference data". First, Nancy needed to review customer files, noting room for improvement. Then, she worked with company employees to perfect the record-keeping process. Record and file review was requiring so much time, that Nancy had little time to spend actually training the staff members. Her productivity and job effectiveness had plummeted due to the increasing amounts of paper-based files and customer records.

The inefficiencies of paper-based records for Lassiter-Ware had also affected customer service response time. When a customer service representative received a client phone call, the representative would put the client on hold and walk to the other end of the building to retrieve the customer file. It could take five to ten minutes in the best case, including the assumption that it was filed correctly or another representative was not already using it. Typically, the representative would have to call the customer back or risk the customer hanging up in frustration.

THE SOLUTION

Lassiter-Ware installed the Captaris Alchemy Document Management software solution on its network, including an Alchemy Server with the Scan extension to add paper documents, the Konica-Minolta Link to integrate with their Multifunction Printers (MFPs), and the Alchemy Web Server to provide access to the information from its main office and seven branch offices. Employees now scan approximately 2,500 pages per day, and remote offices each scan about 500 pages per day onto a local machine and then add the images and data into the primary server repository located in Leesburg, Fla. Paper records are now available for search, retrieval and access from remote locations.

THE RESULT

The savings in time, money and space for the insurance agency have been tremendous.

Now, instead of driving to more than half-a-dozen offices around the state of Florida, or visiting each office every two weeks to review files, Nancy Burton simply calls files up right from her desktop. She searches the documents by keyword and quickly and easily views customer records. The significant time saved has freed her to spend more time on the crucial task of training employees.

Customer representatives are enabled to look up customer data simultaneously while talking to them on the phone. Customer representatives use the intuitive Alchemy interface and simply type a few commands into their computer, while the records appear almost instantaneously. Any customer service representative with appropriate security access, in any office can see all of the documentation associated with a client, regardless from which office the client originated.

Lassiter-Ware's marketing department, based in the company's Tampa offices, uses Alchemy to scan through company-wide records. Marketers sit at their desks and are able to look at any file, at any time, rather than driving hundreds of miles to remote offices. This helps the marketing group more strategically understand additional services they can offer to each individual customer.

Time isn't the only thing Lassiter-Ware has saved using Alchemy. The agency has also saved significantly on storage space. "We have great savings in space," says Don Campbell, Lassiter-Ware's information technology director. "In each office, we were able to add at least one new cubicle because we did not need the room for paper storage. We're able to put staff where we didn't have room for them before. "All in all, we've been very pleased," he adds.

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