

O'Loughlin Insurance Group – Feb 2012

Challenge:

To move to 'all electronic' in order to

- further streamline a growing company's existing electronic workflow and document capture process, and make information retrieval and sharing easier
- optimise the efficiency of document capture processes, saving time and boosting customer service

Strategy:

- Nuance eCopy ShareScan
- eCopy Connector for Open GI

Results:

Batch scanning process makes document archiving quick and easy

Scanned documents are now fully searchable

Information retrieval is faster and easier

Audit trail ensures compliance with regulatory guidelines

Volume of hardcopy paper has been slashed; all filing cabinets will be disposed of before the end of the year

About O'Loughlin Insurance Group

With almost three decades servicing the insurance needs of commercial and private customers, Dublin-based O'Loughlin Insurance Group has become synonymous with high quality, professional service in the field of commercial insurance and wealth management. Consulting on both the underwriting and brokerage sides of the commercial insurance divide, the company's growth has been driven not just by its commercial success, but also through a diligent mergers and acquisition strategy. Today, its commercial clients account for 80% of its customer base, and private insurance and investments make up the remaining 20%. Serving these customers to the professional standards they expect is, therefore, imperative.

Closing a chapter on paper

By its nature, insurance is a document-intensive industry. For the essential task of document capture, printing and copying, the company uses a Ricoh multifunction printer (MFP), supplied by Digicom Office Technology. The MFP works in conjunction with Nuance eCopy ShareScan - with Scan to Folder and Scan to Mail functionality - and Open GI, the leading software provider for insurance brokers in the UK and Ireland. eCopy ShareScan and Open GI were introduced to enable the company to streamline business processes, and to take its first steps toward a paperless office by facilitating the digital capture of proposal forms, statements, policy documents, policy schedules and correspondence with clients.

eCopy ShareScan also captures evidence used to support claims, such as photographs. To give an idea of the scale of the documentation the solution manages, O'Loughlin Insurance Group's director, Derek Balfe, explains: "Our MFP prints 10,000 documents a month, and captures 25,000 per month. Therefore, making this process as efficient as possible is essential."

Smooth integrator

Although the eCopy ShareScan worked well for document capture, documents were saved as image files, so searching electronic content was not always as efficient as it could be. The need to address this challenge was further spurred by O'Loughlin Insurance Group's acquisition of a company that had fully embraced an electronic workflow, and was enjoying the benefits it delivered. O'Loughlin Insurance Group decided the time was right to reflect on how it could further improve its electronic document capture, storage and retrieval processes. It commissioned Connectorworks to develop a ShareScan connector with customised functionality to deliver a more seamless integration between ShareScan and Open GI, thus enhancing efficiency and productivity. Critically, it also had to make it far easier for the group to search data and information in scanned documents.

Plug and play

Since deployment, the company has started to fulfill a long-standing wish; to scan all client files, and store them in an electronic library. The solution's batch scanning capability is playing a key role in the process of capturing large volumes of client files by automating and streamlining the process, turning what would ordinarily be an arduous and time consuming task, into a straightforward one. The value of the ShareScan connector solution isn't just in the ability to batch scan, but also on how it has simplified content searches, making it far easier to search for content within electronic documents. Document retrieval is quicker too, thanks to barcode, client code, and policy code features. From a regulatory perspective, all documents are now time-stamped, so it is easy to tell when they were last amended and by who. Real evidence of how the eCopy ShareScan and Open GI solution have transformed the workplace is explained by Derek: "Previously, we had eight filing cabinets. Today, we're down to four, and by the end of the year, we won't have any in the office."

A framework for a better way of working

Following a brief training session that took less than an hour to equip the staff with the skills they need to get familiar with the technology, today all of the company's staff use the solution. With three months' worth of user experience to reflect on, Derek is able to comment with authority on eCopy ShareScan and the Open GI Connector. "It underpins our drive to a paperless office, while freeing up space so we can fulfil our 2012 business and staff expansion plans. Perhaps more importantly, it's a key driver for enabling us to continue to deliver the service and speed of response people have come to expect from O'Loughlin Insurance Group."