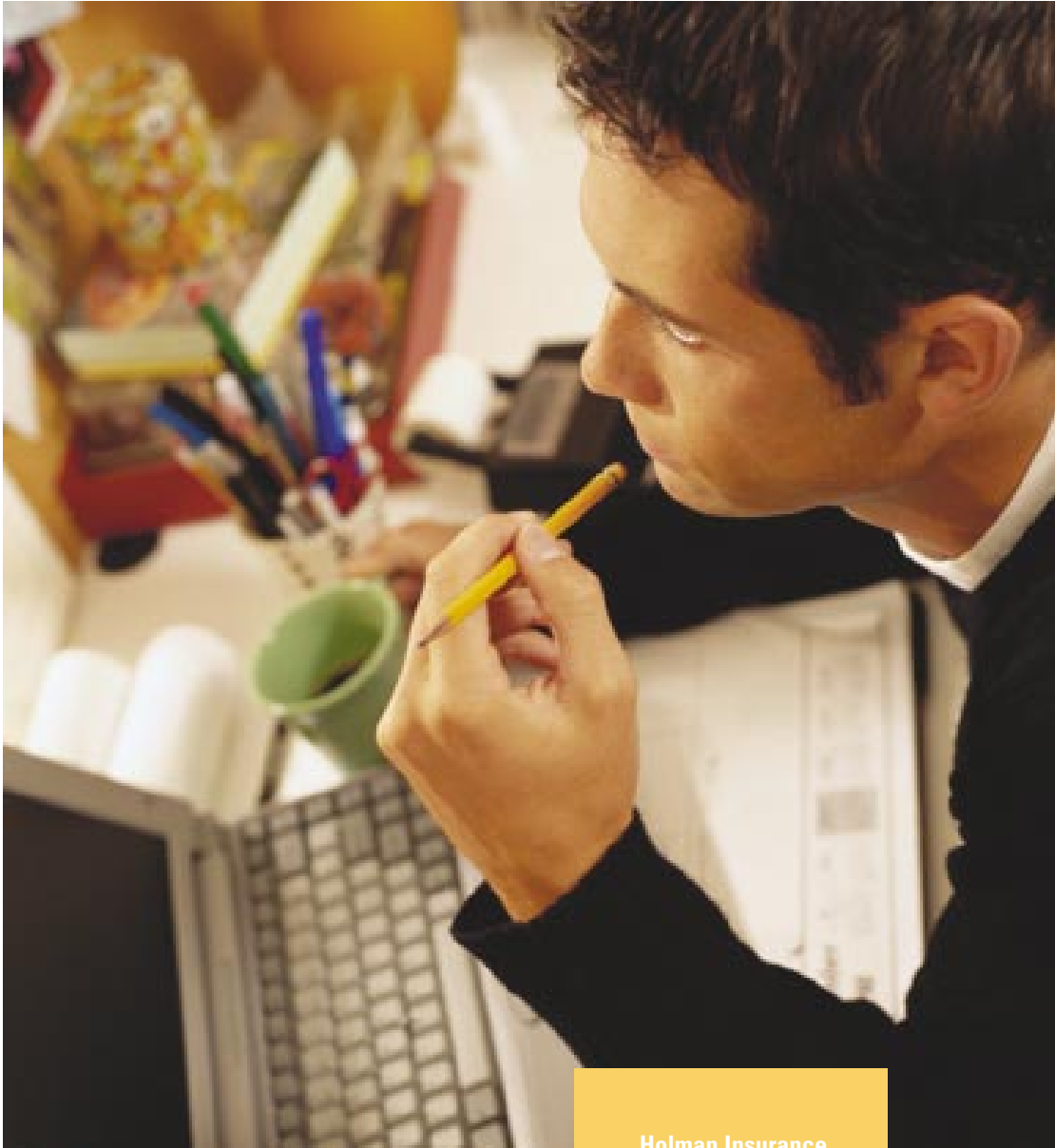# Content Management in the insurance industry:
Helping brokers get the information they need.

Holman Insurance
is refining
and redefining the way
they do business.

PROCESS WORKFLOW

In the insurance industry, a tremendous amount of paper documents is continually created, transferred, updated, reviewed, and stored for years at a time. A wide range of documents, including forms, manuals, policies, payments, applications, appraisals, are handled by brokers and administrators every day, and for most organizations in the insurance industry, managing all that paper is a constant struggle. Perhaps an even larger challenge, however, is building processes around the paper that ensure the information gets to the people who need it, when they need it, and how they need it.

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Some files need to be stored for up to 20 years—recalling a customer's policy implemented years ago can be an extremely arduous task.

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Paper files provide limited accessibility as only one broker can view a document at a time. Information sharing often means photocopying documents—a time-consuming task and a huge paper waste.

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Paper documents are often held in filing cabinets that take up a great amount of potential office space. Other documents may be archived on the other end of the office or completely off-site.

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There is no way to easily attach paper to customer files.

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Time is wasted in not only finding out where a paper document is located, but also physically going to get it. Many paper documents are also misfiled/lost.

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Staff needs a more efficient, more "21st century" way of communicating with customers and outside agencies.

The insurance policy is the lifeblood of any Insurance Brokerage, and Holman Insurance Brokers, Ltd., in Toronto is no exception. Like other members of their profession, Holman needs to quickly review, revise, approve and share tens of thousands of policies, forms and letters every month with numerous agencies, sales brokers, and policy holders.

Holman Insurance has found that by implementing a combination of Xerox hardware and software, the capture, storage, and distribution of documents is fast and easy.

> " DocuShare is the glue that binds our company productivity and success."
>
> *Paul Holman, Vice President, Holman Insurance*

The Xerox solution

Paul Holman, Vice President of Holman Insurance, recognized that to remain competitive, Holman Insurance needed a seamless, painless transition from high cost, slow moving, inflexible paper processes to a robust, Internet-based, and proven document management, capture, and distribution solution that adapts to the way Holman people and partner agencies work.

After researching different solutions in the market, Holman chose Xerox DocuShare a Web-based document management software that complements the functionality of the Xerox Document Centre multi-function device already in place at Holman Insurance.

DocuShare, coupled with Xerox FlowPort software, Xerox's unique image capture and distribution software, gave Holman Insurance the single vendor, low cost, Web-based document management and distribution solution they were seeking.

Refining and redefining

Through "single, green button scanning", DocuShare and FlowPort enabled Holman Insurance employees to transform much of their previously paper-intensive work into a digital process, cutting down on paper storage, faxing and courier costs.

With DocuShare, authorized users have instant access to view, download and edit, print, or post revisions to documents—from anywhere, anytime.

FlowPort captures images, compresses and OCRs them, and finally distributes the images to DocuShare, local or remote printers on the network, or to recipients via fax or e-mail. Unlike traditional scanning solutions that add steps to the scanning process, FlowPort eliminates the need for Holman employees to return to their desktop to OCR and distribute the scanned files.

Holman Insurance regularly needs to share paper documents with multiple recipients simultaneously. At other times, policies with signature approvals and revisions must be shared quickly with sales brokers, managers, and clients. In the past, they mailed copies or sent multiple faxes. Now, with the Xerox solution, Holman Insurance has two streamlined methods of storing, revising, and retrieving policies.

Method 1: Holman Insurance can use FlowPort's intelligent routing cover sheets to scan a document once and then distribute the digital file to multiple Internet addresses. FlowPort saves time and money by routing Holman's scanned files to the intended recipient's e-mail address or to their networked printer or Internet Fax.

Method 2: Holman Insurance staff can use FlowPort to scan directly to Docushare. When DocuShare receives the scanned image, it uses its subscription feature to notify the intended recipients by e-mail with an embedded hyperlink . This alternative allows Holman Insurance to tightly manage and maintain a document's integrity.

FlowPort cover sheet scanned into a Xerox Document Centre

FlowPort server

E-mail

I-fax/Fax

Print

DocuShare
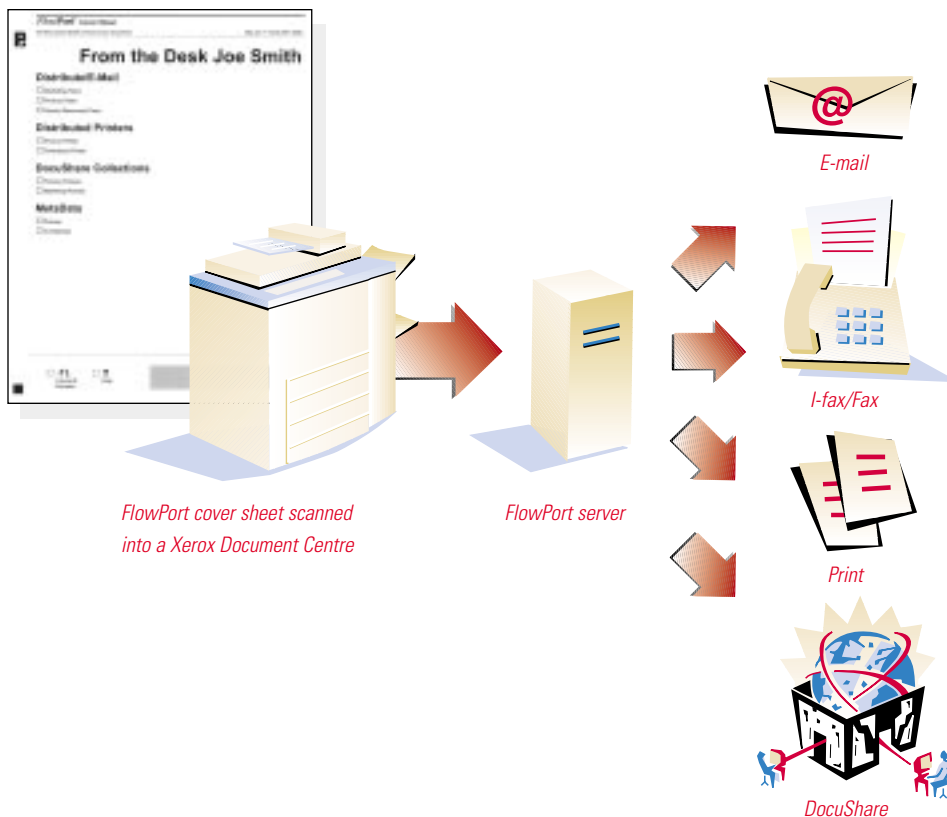
A Faster, Easier Way to Work

Xerox software solutions have empowered the Holman Insurance team to transition a worldwide business into their own system. Management is further penetrating the insurance industry market with the powerful benefits of Xerox technology. They are making a smooth transition from paper to digital in an extremely paper intensive environment. The results are impressive:

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FlowPort and the DC470ST enable staff to digitize multiple documents automatically. Users can literally walk away and perform other tasks while the technology does the work.

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Digitally editing policies and other documents stored in DocuShare is easier, more convenient, and less time-consuming than editing paper documents.

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Digital files can be accessed by any authorized user at any time, anywhere, giving clients around the world instant access. Multiple users can also view the same files at the same time.

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Brokers can share files with DocuShare guests by either posting files as unrestricted or giving temporary permission for clients to view security-sensitive documents.

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Holman uses FlowPort and DocuShare to store, search, retrieve, and manage more than 1,500 pieces of incoming mail each month, as well as maintaining and implementing thousands of policies.

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DocuShare's extensive indexing and search capabilities help brokers access documents quickly and easily—even if they don't know where the files reside.

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Holman Insurance linked DocuShare to partners' Websites, so brokers can access other agencies' documents (and Websites) through DocuShare with the click of a mouse.

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Holman is planning on using DocuShare to replace it's current Web site, eliminating third party Web maintenance costs.

THE DOCUMENT COMPANY
XEROX