Budar Agency

DocStar®

Budar Agency Improves Document Access, Eliminates "Too Many" Filing Cabinets

Company Facts

Overview

- Location: Kailua Kona, Hawaii
- Industry: Insurance
- Number of Employees: 6
- Website: http://agents.allstate.com/ steve-budar-kailua-kona-hi.html

Success Highlights

Challenges

- Space dedicated to paper filing was growing out of control
- Paper filing created unnecessary hassles like misplaced or damaged documents

Solution

- DocStar® Enterprise Content Management (ECM)

Benefits

- Simplified document management
- Greatly reduced time spent retrieving files
- Reclaimed office space previously taken up by file cabinets
- Secured and protected document integrity

Although you can never have too many nice weather days in Hawaii, Steve Budar discovered that you really can have too much paper and too many file cabinets on the "big island." Budar, owner of the Budar Group—an Allstate Insurance agency in Kailua Kona—had an ever growing database of paper. "At one point, we had two rows of four-drawer filing cabinets and then ran out of room to add any more," Budar recalls. "Then we went to a double-capacity system that gave us more filing space, but eventually we filled all of those as well." Budar realized that the time had come for an electronic document management system.

Seven years of thousands of documents

The average insurance office handles about 20,000 documents every year. Everything from applications, policy terms, and renewal notices to claims documentation and declaration pages. Most of these records must be kept for seven years, based on state government mandates. Other offers of additional coverage must be archived for years to guard against liability claims. It's easy to see how this volume can fill multiple file cabinets quickly.

Budar's office—with 5,000+ commercial and consumer accounts—creates and receives considerably more documents than the typical agency. Once Budar made a commitment to electronic document management, he began exploring options compliant with the Allstate policy for electronic documents. One of those systems was DocStar, which bills itself as "the electronic filing system that people want to use." After being impressed with its capabilities and ease of use, Budar made the decision to go with the DocStar system and implementation began in June, 2006.

Up and scanning in no time

Budar's six-person office began with an hour of on-the-phone training from DocStar, and then they were off and scanning. "The learning curve was quite short," says Budar. "It's all gone quite smoothly and now one person does most of the scanning, but two others know the system." The agency now dedicates one person to scanning current docs into the system and working on the legacy archives. The goal is to have all older files scanned into the system by February.

The office greeted their electronic system with enthusiasm. "We're quite computer savvy and automated here," Budar notes. "So this really fits in with what we do. Everyone was weary of the paper-based system, the file cabinets, the documents that got misplaced and all those sorts of hassles."

The front end of the DocStar solution is a Kodak i40 Scanner. "We've found it very easy to use. I joked at first that it didn't look big enough to do the job," Budar says. "But it's very powerful and up to the task."

> "It's a system that's made us more efficient and improved our customer service."
>
> —Steve Budar, Owner | Budar Group

An impressive list of advantages

When asked how life has changed since e-doc came to the Budar Group, Budar ticks off a long list of positives—

- ▶ Fast access to documents
- ▶ Document searchability
- ▶ Ability to simply e-mail a requested form or document to customers
- ▶ Two or more people can access a document at the same time
- ▶ No more misfiled or missing papers
- ▶ No time wasted finding a folder, finding a document, copying it, faxing it and then refiling it
- ▶ Ability to easily make a secure back-up at the push of a button (a DocStar system feature)
- ▶ The reclamation of all the space previously taken up by file cabinets
- ▶ The security of document integrity, back-up copies and file protection

"When I think about it, I come up with other cost saving advantages," Budar says. "For example, the scanner doesn't consume toner and paper like the copier, so those supply costs have been cut. Plus, we use fewer file folders and labels. And the folks in the office appreciate not having to insert those little labels into the plastic holders and affix them to the file folders. It's a system that's made us more efficient and improved our customer service. And I have to say that our customer service was already at a very high level of performance." Budar's biggest concern is whether his hard drive is large enough to handle the volume. "But that's something that can be easily remedied through an upgrade," he notes.

To date, three other Allstate agencies in Hawaii have purchased the same solution featuring DocStar software and a Kodak i40 Scanner. "Word of mouth is the best endorsement," says Budar. "And I have nothing but good things to say about this solution and all the benefits that it's brought to the agency."

About DocStar

Helping businesses translate vision into action for more than 20 years, DocStar delivers a flexible and innovative enterprise content management and process automation platform. Easy to implement and use—both in the cloud and on premises—DocStar proven technology and global process expertise empowers organizations to operate at peak performance, navigate change, and grow.

DocStar®