

# SDL Brokerage Inc. and Group Health Solutions Inc.

## Boosting Productivity With DocStar File Management Solutions

### Company Facts

#### Overview

- ▶ Location: New York, New York
- ▶ Industry: Insurance
- ▶ Number of Locations: 2
- ▶ Website: [sdlbrokerage.com](http://sdlbrokerage.com) and [grouphealthsolutions.com](http://grouphealthsolutions.com)

### Success Highlights

#### Challenges

- ▶ Growing paper file storage needs required additional space
- ▶ Unable to quickly locate client information

#### Solution

- ▶ DocStar® Enterprise Content Management (ECM)

#### Benefits

- ▶ Reduced file storage space and maximized office space
- ▶ Improved customer service and response time



SDL and GHS is a combined full service insurance agency located in New York, New York. The agencies are comprised of four departments—Accounting, Commercial Lines, Personal Lines, and Life Insurance and Employee Benefits. Employee Benefits employs their own house producers as well as servicing the producers of several large national P&C underwriters.

### Application

Initial installation of InStar Imaging, powered by DocStar, included scanning Commercial Lines and Personal Lines files. Upon an office location move, the agency then included their Employee Benefits files. SDL and GHS use a scanning process where once a project has been completed, the file is scanned immediately and the hard copy is then able to be shredded.

### The problem

SDL and GHS were encountering three main concerns with regards to their files. First, they were outgrowing their office space. More storage was needed, and the space simply was not available. Second, the Employee Benefits department was growing faster than they could maintain the increased paper and files being produced. The third important concern for SDL Brokerage, Inc. was they needed to find a way to quickly find client file information when requested.

### The solution and benefits

Physical space savings have proven to be a valued benefit of adapting InStar Imaging. Prior to document management, SDL and GHS stored 33 file cabinets of information. That number is now down to 13 file cabinets, with expectations to have only two file cabinets of storage by year's end.

To put a financial perspective on the agencies' experience, prior to scanning and document management, they used about 100 square feet of storage space at \$32 per foot in rent. Storage savings are expected to be over \$3,000.

"A client recently called in—the producer they needed to speak with was not in the office. While staying on the phone with the customer, I was able to retrieve the archived file, quickly scan through the document, and find the information they needed. I never had to leave my desk or have another employee spend time searching through a file cabinet for the document," says the manager of SDL Brokerage, Inc.

In addition to storage costs, response time and customer service have also improved. The time saved in not having to run around the office looking for a file cabinet or misplaced document has been invaluable to SDL Brokerage, Inc.

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—Agency Manager | SDL

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### 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.

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Contact us for more information on DocStar products and services

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