

# The Tassey Group

## Life Insurance Underwriters Find Cost and Time Savings With Electronic Document Management



### Company Facts

#### Overview

- ▶ Location: Berlin, New Hampshire
- ▶ Industry: Insurance
- ▶ Employees: 300
- ▶ Website: [www.tasseygroupinsurance.com](http://www.tasseygroupinsurance.com)

### Success Highlights

#### Challenges

- ▶ Needed greater control over high paper volume
- ▶ Lacked digital document search and retrieval capabilities
- ▶ Wanted to improve service by providing quick answers to inquiries

#### Solution

- ▶ DocStar® ECM

#### Benefits

- ▶ Lower operating expenses and greater efficiency
- ▶ Deliver customer quotes in minutes rather than hours
- ▶ Answer customer inquiries immediately without searching paper files



Acting as general managing agent for one of the country's largest and most innovative life insurance underwriters is a demanding challenge for The Tassey Group of Berlin, New Hampshire.

The agency serves as the sole representative for the insurance carrier over a wide swath of territory that includes New Hampshire, Vermont and parts of Maine and Massachusetts. In essence, the Tassey Group is the face of the insurance company for the 300 independent brokers that sell the policies, providing a host of marketing, education, and application processing services that brokers need to be effective.

#### Application

The Tassey Group installed DocStar to gain greater control over their volumes of paper. The system electronically files and retrieves key documents, including signed policy applications and medical reports.

Its powerful, automated search and retrieval capabilities—accessible through easy-to-use Microsoft® Windows®-based software—allow agency staff to locate and view documents within seconds. Through the facsimile function, copies can be distributed quickly to brokers or applicants. The system is connected to the agency's office network, so that multiple employees can use the system simultaneously.

#### The problem

According to Michael N. Chambers, a principal of the agency, "An incredible amount of followup goes on during processing policy applications. We're always going back to the broker for more information, such as medical records and child ages, and they're calling us to check the status. So we're always referring to the application file, and a day rarely goes by when we don't pull 20 to 25 files."

Before DocStar, The Tasse Group navigated this mound of paper by hand. Applications and other information were photocopied and filed, with original documents sent either to the insurance company or back to the applicant. Files often included large documents, such as medical reports up to 80 pages long. Many documents consisted of hard-to-decipher handwriting and poor-quality photocopies.

## The solution

With the help of DocStar partner PIF Technologies, Tasse redesigned their process. Signed applications and other original documents are now scanned into DocStar and the originals are stored randomly in a box for bulk shipping at a later date. Copies of these documents are sent immediately via fax to the insurance company, without the manual steps of printing are hard copy and dialing the fax machine.

## The benefits

"We immediately saw how DocStar saved time in responding to customer requests, as well as headaches," Chambers said.

**"While competitors boast about one-day turnaround, we can deliver quotes by fax within two to three minutes."**

—Michael N. Chambers, Agency Principal | The Tasse Group

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DocStar has produced substantial increases in efficiency and reduced operating expenses. Simplified filing enabled the agency to eliminate one clerical position and shrink copying expenses—previously running at an annual volume of about 40,000 copies—to almost nothing.

Perhaps the greatest benefit is the ability to respond quickly to customer inquiries, which builds further momentum behind The Tasse Group's customer service-oriented business strategy.

"If someone calls to check an application status, we electronically search for the information and give the person an instant answer," Chambers said. "We used to sift

through the paper files, which took an average of three minutes."

"Most of the time, we wouldn't keep a customer on hold while we looked—they're busy people so we'd take a message and call them back after we found the information. Sometimes, this resulted in 'phone tag,' so the customer didn't get an answer for a couple of days."

Installing the DocStar system and migrating to new filing processes also was painless for 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®

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