

The Church Agency, Inc.

Integrating Software Leads to Improved Customer Service

Company Facts

Overview

- ▶ Location: Akron, Ohio
- ▶ Industry: Insurance
- ▶ Website: www.churchagency.com

Success Highlights

Challenges

- ▶ Insufficient paper file storage space
- ▶ Time-consuming file retrieval processes

Solution

- ▶ DocStar® Enterprise Content Management (ECM)

Benefits

- ▶ Improved customer service through easier file retrieval
- ▶ Saved time by allowing fax, print, and e-mail capabilities
- ▶ Added a security class to keep documents private
- ▶ Reduced confusion inherent in tracking paper document revisions
- ▶ Seamlessly integrated with an existing business management software



Customer profile

The Church Agency, Inc. was founded in 1950 by J. Donald Church and provides a variety of insurance services—auto, home, business, health, and life—in the state of Ohio.

Application

The Church Agency uses Applied Systems The Agency Manager (TAM) software to manage their business. The DocStar system is integrated with TAM to provide a seamless flow of information on clients.

“We scan between 360 to 420 pages per day using DocStar, including all client policies, endorsements, claims, etc,” said Cindy Crew, Corporate Treasurer for The Church Agency. They employ “back-end scanning” using barcode sheets to batch file documents. Scanned documents are filed automatically according to the information read from the barcode sheet.

The DocStar TAM Integration Module provides integration with TAM, making filing more convenient and allowing instant viewing of imaged documents without complicated switching between applications. “From within TAM we can access all scanned documents,” Crew said. “If we need to e-mail or fax documents we can print from TAM or send directly from DocStar.”

Scanned documents are archived using two-tier storage for secure backup. The DocStar solution automatically time and date stamps (AuthentiDate) every document and creates an unparalleled audit trail to ensure that document revisions are tracked and verified.

The problem

"We were starting to run out of storage space," said Crew. "Instead of buying more filing cabinets, we decided to look into imaging to eliminate the paper. We were also concerned with the new privacy laws. We wanted an imaging solution that integrated with TAM so we could easily access the filed documents from our desk and within the customer's TAM file," Crew continued.

The solution and the benefits

"With DocStar, the CSR (customer service representatives) no longer have to go to the file cabinet to look for documents—it's right at their fingertips," said Crew. "This saves us valuable time and improves our customer service. The faxing, printing and e-mail capability are also time savers. If a bank, or anyone else, calls requesting a copy of a document, we can bring it up quickly and fax or e-mail it immediately."

E-mailing applications directly from DocStar also saves postage, paper, and time. The Church Agency also receives faxes through DocStar. This saves money on paper and toner supplies.

Security concerns are addressed by scanning files under a security class that only the producer and CSR have access to.

The DocStar system also reduces the confusion inherent in tracking paper document revisions. "When an application is scanned for the permanent file we know exactly what was on the application at the time it was sent," said Crew. "AuthentiDate is used to verify the date, so if anything on the application was changed later, we can verify the dated copy of the original application. This eliminates costly and time-consuming errors."

Cindy Crew was particularly impressed with DocStar's support and training. "The DocStar people are wonderful," said Crew. "They answered all our questions, trained us, and are still available any time we have a question or problem."

When they first installed DocStar, The Church Agency started scanning from the current day's processing forward. They have started working on scanning permanent files and will eventually scan their employee records and accounting files.

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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