



CASE STUDY

ABBIE MURPHY (LONGFORD) INSURANCE BROKERS



Integrated Electronic Document Management

"The Adest Document Management System really is a God send – believe it or not, it is true!!!"

Gone are the days of trekking around the office looking for a file only to find that somebody else is using it. Now more than one person can view the file at the same time. This is a 100% improvement on efficiency in the workplace. Staff now have all the files in the office at their fingertips 24/7 but without the clutter!

Previously if one Account Handler is working on a file and another needed access to it, both had to waste valuable time passing it over and back to each other, thus time is now being used effectively and productively.

When Adest were installing the software they worked with us and matched our specific requirements in order that the system was virtually tailor made for Abbey Murphy Longford. It is hard to believe that a system that does so much can be so easy to use.

The simplicity and clarity of the system means that it integrates with and improves work practices immediately. And of course the peace of mind of knowing that all current and past client files are always to hand and safely backed up is very reassuring.

We now cannot imagine what life was like before Adest!"

Celine Gill,
Abbey Murphy
Insurance Brokers

ABOUT ABBIE MURPHY INSURANCE BROKERS

Abbey Murohy are a Life & General Insurance Brokers based in the thriving Midlands town of Longford since 1986, with a varied (and ever increasing) client base. They have an extensive portfolio of Motor, Household, Liability, Commercial Life, Pensions and Healthcare, yet still succeed in giving personal, well informed, quality advice and service.

THE CHALLENGE

In an environment of rising costs, increasing premiums and intense competition, Abbey Murphy Insurance Brokers realised that the processes to deliver their insurance services had to be made more efficient. Quality of service was also a critical differentiator, with the ability to respond to customer queries in real time a necessity. Existing operating costs had to be reduced in order to remain competitive and improved security and, in the event of a fire or flood, business resumption to include originally paper based documents was essential.

THE SOLUTION

Abbey Murphy chose the Adest iFile Solution integrated with the Relay Broker application as it is designed specifically to meet all the document management requirements of brokers using this application. The Adest application seamlessly integrates with the Relay WorkCentre thereby providing added value for investment in their existing IT infrastructure.

The Adest solution significantly enhances productivity and reduces costs through the capture, storage, organisation and retrieval of all Client, Policy and Claim related files and documents, i.e. both paper and electronic. The direct link to Relay's broker management system allows staff immediate access to documentation relating to clients, policies and claims without the need to search through numerous paper files.

Abbey Murphy now scan and capture all incoming paper based documents including client policies, claims, correspondence, application forms, certificates, endorsements, etc. Once captured electronically, they are attached directly to the relevant client, policy or claim record within Adest and/or routed electronically to the appropriate account executive to handle. Incoming e-mails or faxes are dealt with in a similar manner. In addition, as documents are processed, the Relay Diary is seamlessly updated so no documents are mislaid and all incoming documents are tracked ensuring no oversight in the provision of client service.

THE BENEFITS

- ✓ **Increased productivity and time savings** - considerable improvement in the process of receiving/distributing incoming correspondence. Time spent filing, retrieving and replacing files is minimised
- ✓ **Customer Service Productivity** - since implementing Adest, staff instantaneously handle client queries and requests for copy documents from files are now delivered (fax, e-mail, etc.) directly from their desktop
- ✓ **Cost Savings** – savings are evident in the reduced requirement for paper, stationery, etc.
- ✓ **Mislaid Files** - mislaid Files are a thing of the past as original files never get taken out of the system and are always available irrespective of whether they are in use or not
- ✓ **Office Space** - reduced pressure on office space as paper generation is drastically reduced
- ✓ **Audit Trail/Tracking** - improved visibility and control of the business with tracking of status and action required for each inbound document

FUTURE PLANS

Current plans are to further automate document capture and indexing in areas such as insurance renewal and post room.