



Case Study Facts:

CLIENT: Teague Financial Insurance Services, Inc.

DIGITECH SYSTEMS RESELLER: Docusure

PROBLEM: Implement an ECM system that would improve document security, increase staff productivity and require no IT resources

SOLUTION: ImageSilo and PaperVision® Enterprise Tools

RECOGNIZED BENEFIT: Improved document security without additional IT resources and provided the productivity and process efficiency needed to gain a competitive advantage

Teague Financial Insurance Services Assists Customers Faster with ImageSilo®

Teague Financial Insurance Services (TFIS) was becoming increasingly frustrated with their paper-based filing system. Retrieving, copying and sending files was time consuming. Misplaced files were always a problem and slowed document processing. Employees didn't want to share in the filing responsibilities, because it was tedious, clerical work. Plus, federal regulations required their health and life insurance applications to be secured at all times. President of TFIS, Jean Strouf could see their paper processing delay was becoming a risk to the business, and this risk was one she couldn't insure.

After implementing ImageSilo, TFIS has a new advantage over its competitors. They turn insurance applications into coverage faster than others. They have 319 more hours of productivity every year for selling and serving customers, and they save \$24,000 each year in file management.

The Situation

Founded in 1986 by two top insurance professionals, Jean Strouf and Walt Johnston, TFIS (www.teaguefs.com) has grown into a leading independent agency for medical and dental insurance, employee benefits and financial services in California. As a full-service agency, TFIS assists businesses, families and individuals in finding the most appropriate and affordable health insurance.

The Health Insurance Portability and Accountability Act (HIPAA) was the driving force behind their search for a new way to manage information. HIPAA requires companies to provide administrative, physical and technical safeguards for protected health information, and violations can result in severe civil and criminal penalties. TFIS' compliance strategy was simple but not comprehensive. A locked file room protected files from unauthorized access, but once documents left the room, they were hard to secure and copies of documents were equally as difficult to protect.

File system accuracy, document retrieval and record sharing were the biggest frustrations of the paper system. On average, employees spent more than 300 hours every year searching, retrieving and returning documents to the file room. Forty of those hours were spent searching for misplaced files. When it was time to send insurance applications to underwriters, TFIS couldn't fax documents because of image distortion. They had to copy and expedite files via mail, which cost the company \$1,200 each year.

Strouf was reluctant to investigate an Enterprise Content Management (ECM) system, because she thought it would require IT resources to manage a server and data storage. As a small company, TFIS did not have an IT department, nor the time and resources needed to take on new IT responsibilities. They wanted a system that could convert paper documents to electronic files and help them manage records efficiently—without all the IT burdens.

"I was terrified of the maintenance, time, and cost needed to manage our own data storage, because I have seen what happens to companies when they don't have access to the information they need to run their business. I was so relieved to find out ImageSilo could manage it all for us with a secure and reliable system."

-Jean Strouf, President

Key Benefits

- Conserves more than 300 hours in file management each year
- Grows the business 10-15% annually without hiring more administrative personnel
- Saves \$24,000 in filing costs and \$1,200 in mailing costs every year
- Improves document processing time and customer service

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The Solution

In 2006, Docusure, a Digitech Systems top reseller, met with TFIS to evaluate their problems and recommend solutions. Strouf was surprised that she could outsource ECM services and achieve company goals without costly capital investments in hardware, software or IT personnel. "We chose ImageSilo, because it could help us comply with HIPAA and keep the weight of data management off our shoulders," she said.

With an on-demand system, implementation took no time at all. Docusure set up ImageSilo and trained all 10 users in less than a day. TFIS is charged based on how much storage space they use, and the monthly operating expense is tax-deductible. Plus, TFIS never has to worry about running out of storage space, because it automatically scales to meet their needs.

Recognized Benefits

Today, TFIS employees return from a client meeting with a handful of signed insurance applications and scan them at the office. PaperVision Enterprise Tools provides out-of-the-box integration with Microsoft® Windows Explorer and enables them to upload files directly into ImageSilo. Then, users access the internet from anywhere, log into ImageSilo and use powerful search capabilities to retrieve documents in an instant. As a result, employees save more than 300 hours of filing time and \$24,000 in labor costs every year.

Documents stored inside the system are protected by five levels of system security, helping TFIS comply with HIPAA regulations. Users must log in to access protected health information and a session timeout feature requires users to log in again after a set period of inactivity. In addition, encryption ensures security while documents are transmitted over the internet. "ImageSilo helps us protect client privacy and confidentiality and enables us to carry out company compliance strategies," said Strouf.

With the option to email documents, TFIS can share information with general agents and underwriters quickly and affordably. Instead of copying and mailing applications, they securely email them using document grant technology that allows third parties limited access to specific documents. Applications are no longer mailed, saving \$100 every month.

The new system has provided a competitive advantage and benefited customer service. "With ImageSilo, we can move documents more quickly," said Strouf. "As a result, we get a faster turnaround than our competitors."

With the speed of an electronic system, TFIS is able to initiate insurance coverage and issue insurance ID card information earlier.

By outsourcing ECM, TFIS has avoided capital and IT personnel

costs required by an in-house solution. With the time and money savings, Strouf is able to delegate more resources to serving customers and bringing in new business. Thus, TFIS has experienced a 10-15% revenue and volume growth each year. "We have grown faster since the implementation of ImageSilo. With our efficient system, we have been able to increase business without hiring new people," said Strouf.

"In insurance, the price is fixed. It's the service that distinguishes one company from the next. ImageSilo saves us 319 labor hours and \$24,000 each year, allowing us to better serve customers and grow our business without hiring more administrative personnel."

-Jean Strouf, President

About Docusure

Founded in 1993, Docusure is a top performing Digitech Systems' reseller and 2008 Circle of Excellence member. Docusure enables organizations to reduce paper storage, minimize costs and improve customer satisfaction. By converting paper documents to digital images, indexing and storing documents, Docusure manages the complete document lifecycle. For more information call 877.722.6646 or visit www.docusure.com.

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