

## CASE STUDY



Integrated Electronic Document Management

Productivity is where the real benefits come. You see it immediately in the reduced time people now spend handling tasks such as renewals, no more pulling client files, having to call back clients. You now have instant answers on screen.

The goal of better, faster customer service through quicker query resolution has been achieved.

It's the way to go, as the competition in the Irish insurance Broker market increases the need to be better, faster and more efficient is more and more prevalent. Adest can be utilised in lots of areas of the business and we intend to grow the system over time.

Financial Director  
Intersure Group



## INTERSURE GROUP

### **ABOUT INTERSURE GROUP**

Intersure Group are a financial advisors composite broker dealing in mortgage, life and pensions, commercial and personal lines.

### **THE CHALLENGE**

Intersure Group wanted to avoid having key people wasting their time running round looking for information to assist customers. They needed all information and relevant documents to hand; This was the main driver for seeking a document management solution. In addition there was a lot of space wasted (taken up by filing cabinets) and combined with potential compliance issues, i.e. lost or incorrectly filed documentation. The decision was taken therefore to implement a quality document management solution and thereby improve how Intersure Group did business and ensure the continued delivery of efficient services to customers.

### **THE SOLUTION**

Intersure Group evaluated three solutions however choose Adest over others as they felt Adest had the greatest experience combined with the best solution. "It was clear that they had done this before, many times and very successfully". Adest assisted the Intersure Group link remote offices and make decisions on what documents to back scan in order to optimise the return on investment in their overall document management solution. "With the help of Adest we were able to get all required documentation onto Adest and linked to our Broker management system".

Once the detailed specification of how the Intersure group wanted their business processes to operate was complete, the solution was implemented in a matter of days thereafter and all offices we were up and running within three weeks of sign off with minimal change management. "Adest just knew what we were looking for and conveyed an excellent understanding of our business."

### **THE BENEFITS**

- ✓ **Increased productivity and time savings** - considerable improvement in the dealing with customer queries
- ✓ **Cost Savings** – savings are evident in the reduced requirement for photocopying, stationery, distribution, etc.
- ✓ **Audit Trail/Tracking** - improved visibility and control of the business with tracking of status and action required for each inbound document
- ✓ **Centralised Storage** – centralised server and back up's, lowering maintenance and hardware costs and keeping document storage simple and manageable.