



## **CASE STUDY**



Integrated Electronic Document Management

*"The implementation of the Adest Document Management software allows O'Driscoll O'Neil to handle client requests immediately, for example, requests for copies of documents are now available on screen so staff don't need to go to a filing cabinet and manually retrieve, copy, post or documents. This has allowed us to transfer three filing clerks to Customer Services.*

*Given our daily volumes of queries, Adest has dramatically improved customer service and delivered immediate productivity gains."*

- **Niall O'Driscoll**  
**Managing Director**  
**O'Driscoll O'Neil**



## **O'DRISCOLL O'NEILL INSURANCE BROKERS**

### **ABOUT O'DRISCOLL O'NEILL INSURANCE BROKERS**

O'Driscoll O'Neil, established in 1987 and employing now some 40 members of staff is one of Irelands most successful insurance brokers and the First brokerage in Ireland to obtain the ISO9002 and Q Mark

### **THE CHALLENGE**

O'Driscoll O'Neil identified rising costs, increased competition and demand for better service as crucial issues that needed to be addressed in order to remain a leading insurance broker. While they did not want the turmoil of introducing new business processes, they recognised that to become more responsive and efficient meant an easy and effective solution was needed to replicate their existing administrative processes yet radically reduce the volume of physical paper used.

### **THE SOLUTION**

O'Driscoll O'Neil use broker management systems from both Insight and Broker CRM so integration with the Adest iFile document management software was key to giving customer service staff immediate access, from their desktop, to all documentation relating to clients, policies and claims. This enabled enquiries that previously took 15 minutes to address were reduced to 3 minutes!

O'Driscoll O'Neil receive 300+ pieces of mail per day, previously some post was often not all dealt with until the following day. Using Adest post is opened on receipt in the post room and within hours all documents are scanned, electronically routed to the appropriate recipient and filed against the relevant client file in the Broker Management system. The post and paper does not leave the post room!

Simultaneously the Adest iFile Solution informs the recipient that correspondence has arrived for processing. The tracking and reporting capabilities means that no document is ever overlooked or mislaid, helping O'Driscoll O'Neil meet regulatory business process requirements. Reports (Internal Quality Audits) can then be generated that prove it!

### **THE BENEFITS**

- ✓ Greatly reduced savings in filing costs, estimated to be over €40,000 per annum
- ✓ Dramatic reduction in paper usage - stationery savings of circa €5,000 per annum
- ✓ No more filing cabinets - 1200 sq feet of office space released worth €20,000 p.a.
- ✓ Time saved retrieving documents - estimated value €10,000 p.a.
- ✓ No more mislaid documents
- ✓ Customer response time dramatically reduced
- ✓ Secure storage, archive and backup of all client files
- ✓ Enhances compliance with regulatory requirements

### **FUTURE PLANS**

Having originally implemented the Adest solution over 10 years ago, O'Driscoll O'Neil has been continuously enhancing and improving their business processes with the Adest software. Current plans are to further automate document capture and indexing in areas such as insurance renewal and post room.