

Success Story from Kodak

Like all insurance companies, business at Gore Mutual was traditionally very paper intensive. There were contracts, policies, applications, multi-part claim forms, and more to deal with, refer to, and store—often for the life of the insurance policy. After decades using a paper-based filing and access system, the company embarked on a gradual, orderly transition to electronic document management solution in 2001. First there were flatbed scanners and today there are two **Kodak i620** Scanners, along with a modular enterprise content management solution that has grown with the company's needs.

An orderly evolution to electronic records management

With approximately 300 people on staff at two major locations in Canada and over 300 independent brokers around the country that represent and sell their insurance products, Gore Mutual Insurance must manage a great many sources of business-related documentation. Headquartered in Cambridge, ON—50 miles southwest of Toronto—and founded in 1839, Gore is Canada's oldest property and casualty insurance company, offering complete lines of personal and commercial insurance products.

Vicky Cole, now Manager of Document Services, worked in the document services area when electronic imaging was first implemented. "We began by phasing in document management department by department," she recalls. "Starting in the personal lines area, we initiated a mirrored

From flatbeds to high-volume scanning: the evolution of document management at Gore Mutual Insurance



Vicky Cole, Manager of Document Services, Gore Mutual Insurance

workflow that paralleled our paper-based processes. We gradually added the commercial department and satellite offices, then claims, followed by accounts receivable." This process took about five years and replaced a staff of "file runners."

"We used to have these runners on each floor and three more in the mailroom," she says. "These individuals would find and transport 50 to 60 active files per day between departments. Very often an underwriter, for example, would keep a file on his desk until the policy was completed, so we often didn't always know where to find a file."

In order to provide superior customer service to brokers, internal personnel and clients, Gore worked with Microdea, a supplier of advanced document, workflow and process management technologies headquartered in Richmond Hill, a suburb of Toronto. Microdea's Synergize solution provided Gore Mutual's stakeholders with a scalable way to improve customer service, optimize business processes, and reduce operating costs.

SITUATION

Canada's oldest property and casualty insurance company is overwhelmed by paper and needs to find a way to speed the flow of information to and from customers, staff and brokers.

OBJECTIVE

Build an electronic document information system via an orderly, step-by-step process that works for all stakeholders, speeds workflow, saves money, and delivers security and compliance.

SOLUTION

Kodak i620 Scanners teamed with Microdea's **Synergize** Solution.

COMMENTS

"We have doubled our business in the past five years, yet haven't had to add any new staff for our mailroom in order to handle the business volume. That's a tribute to our **Kodak** Scanners and document management system."

~ Vicky Cole,
Manager of Document Services,
Gore Mutual Insurance

Kodak i620 Scanners ensure productive uptime

Microdea recommended Kodak i620 Scanners for Gore Mutual, and Cole says the front-end capture portion of their process works almost flawlessly. "We receive a great many multi-part documents—NCR forms and similar—and the Kodak i620 Scanners handle them beautifully," she notes.

"Jamming and double feeds are issues we rarely encounter. With some other scanners in the past we had problems with onionskin paper, for example. Now those scan through seamlessly. It's critical for us to be productive and our downtime with the Kodak Scanners is almost non-existent."

Brokers often visit Gore's Cambridge headquarters and will discuss document management systems with Cole, who often suggests Kodak Scanners as an integral part of a solution. "I tell them that the images of the documents we scan often look better than the originals in terms of contrast and legibility. The colors are clear and crisp, and unlike paper, the text density won't fade over time on a digital image," she says. Gore's scanner operators are fond of the Kodak i620 Scanners, finding the interface to be very user friendly and intuitive.

Gore Mutual scanned their legacy documents through an outsourcing arrangement. When selecting the vendor, Cole was reassured to know that these thousands of important records would be captured by Kodak Scanners (and they were), resulting in similarly exceptional image quality.

A faster, safer, less-expensive way of doing business

Today, through various modules of the Synergize Solution, Gore Mutual's customer service staff can quickly and knowledgeably respond to broker and client inquiries, thanks to this centralized system. "Brokers no longer have to wait two or three days to receive a paper copy," Cole says. "Customer service and satisfaction is at an all-time high for us."

The claims department processes multiple documents simultaneously, enhancing workflow and ensuring its completeness. Claims examiners, through real-time access to client data, can respond with the speed and accuracy clients expect.

The system also provides safety and peace-of-mind. "If there was a fire at one of our brokers, for example, we could restore their relevant files within 90 minutes," Cole says.

As electronic and paper records come into Gore, they are generally indexed by policy number and saved as TIF files, PDFs or Microsoft Word documents. For documentation purposes, JPEG images and video files are also archived. Cole estimates that about 30% of files still originate on paper, while the remainder arrive electronically.

Documentation is kept on the electronic system for the life of each policy. Gore's team assures compliance through the system, addressing the inventory of documents in the system, proper document destruction, workflow (the tracking of documents as they progress through the company), and other

key areas. There is also a secure electronic repository in place to safeguard and back-up all documents.

The savings that Kodak Scanners and their ECM system deliver to Gore come in multiple ways. Cole says document printing has been greatly reduced at their offices and brokers, as people know they can go in and find a document easily without the need for a hard copy. The amount of time searching for files has been dramatically reduced. And there's no longer the worry about misplaced or lost paper files.

"We've been able to productively use space that used to be devoted to file storage" Cole notes. "We have doubled our business in the past five years, yet haven't had to add any new staff in the mailroom in order to handle the business volume. That's a tribute to our Kodak Scanners and document management system. With a paper-based structure we'd easily need 30 people. Today we have 13 and the workflow is highly productive."



The Kodak i620 Scanner
Easy on your operators, and your bottom line—the award-winning Kodak i600 Series Scanners take scanner performance to the next level.

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