

Infonic ensures Document Management success at Sterling Insurance Group



Company: Sterling Insurance

Country: United Kingdom

Industry: Insurance

Profile: UK based insurance group offering Life Insurance, Payment Protection, Commercial Insurance, Health and Household Insurance. Employing over 300 people at 2 main sites.

Key Drivers: Automated processing of inbound mail. Storage of customer files. Automation of internal filing processes.

Sterling Insurance Group Limited is a UK insurance organisation operating across a number of market sectors with a range of insurance products and services to a range high street brokers and leading retail banks and building societies. Sterling needed help handling increasing volumes of paper mail.

Piles of post were slowing Sterling down

Sterling receives a large volume of letters by post every day. This mail had to be opened, sorted and physically delivered to the appropriate departments. This sluggish process led to most correspondence remaining unaddressed until after midday. The postal process was a communications bottleneck that compromised Sterling's ability to meet the strict service standards dictated by FSA regulations

Sterling decided to implement electronic document management to streamline its mail handling and distribution. The Document Manager system was to allow all types of documents to be captured, stored centrally, and made accessible to all users 24/7. This would enable the group to deliver clients a more immediate response to their telephone queries and higher service standards overall.

Choosing Infonic Document Manager

After a rigorous selection process, Infonic Document Manager was chosen to supply a DM suite to Sterling Insurance Group. Infonic's Document Manager was chosen for its reliability, ease of use and scalability.

Infonic software was first deployed in 2003 to facilitate document scanning and control within Sterling Life in Richmond.

Once the benefits of DM were proven other members of the Group adopted the system. The next installation was within the Finance team in Westbourne House, Folkestone. A subsequent deployment was made within the Financial Sector Products division of the Group. It has now been agreed that Infonic based Document Imaging and Workflow should be deployed group wide. Infonic's software will eventually consolidate all the Imaging and Workflow requirements across Sterling Insurance Group.

CASE STUDY - Document Manager - Sterling Insurance Group



“Document Manager’s advanced security features control access to sensitive documents. They are only available for viewing by those nominated to do so”

**Paul Baker, Business Analyst,
Sterling insurance Group**

Benefits of Document Manager

- High quality document image capture
- Retrieval of documents takes seconds rather than minutes
- Elimination of paper, freeing up valuable floor space
- Flexible administration tool delivers high levels of security
- Highly scalable modular software solution
- Improved information back-up and disaster contingency
- Improved customer service and staff efficiency

The Document Manager Solution

Infonic Document Manager provides the platform for an entirely new insurance document management system within Sterling Insurance. Sterling’s Household Underwriting and Claims areas are using Document Manager to capture and manage all daily items of post within their Service standard guidelines. This platform is being expanded to the Commercial insurance area and then to the Broker and Financial operations.

Sterling worked with the development team at Infonic to produce a solution that met the very specific requirements of Sterling’s business units. These tailored features included the ability to auto-save application (Excel and Word) documents into the Document Management system with little interaction from the user.

Other important features were an integration with Sterling’s legacy systems that enabled diary entries to be created when an expected piece of post had arrived.

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