

Sutton Barnard goes for the Document Manager Archive solution

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Country: UK

Industry: Insurance

Profile: Sutton Barnard is specialists in scheme insurance.

Key drivers: To be able to store live documents. To be able to scan client files. To be able to store all live documents electronically. Integration with in-house system. Immediate access to any file or document. Reduced time in processing documents.

Specialising in scheme insurance, with specific packages for a variety of market sectors, Sutton Barnard is one of the UK's leading insurance brokers. Key business areas include Commercial Insurance packages for motor traders, printers and print specialists, hotels, public houses, offices, professional indemnity for Management Consultants, general commercial insurance and wedding insurance for private individuals.

A mature and experienced user of IT - based in Godalming, Surrey, and employing over 30 professional staff - the company is part of the Sutton Group of companies, established in 1978. The schemes are marketed through a direct sales force situated in various locations around the country and a network of regional brokers.

Office space reduced by filing cabinets

Sutton Barnard manages its entire administrative, quotation, documentation and client management processes through an in-house developed system. This is a Microsoft SQL Server based system that holds data on clients, insurance companies, and sub brokers. The process demands the generation, collection and storage of thousands of paper and electronic documents every week.

"The system had the capability to store and retrieve client records and display basic policy calculations, but all other documents were kept in paper files," says Sutton Barnard IT Director Allison Barnard. "This meant that files often went missing. We work in a competitive marketplace and we wanted to stand out from the crowd. Our system did occasionally let us down."

"Historically, we built up huge quantities of manual files," says Allison Barnard. "This was stored in scores of filing cabinets occupying most of one of the floors of our office. The business expanded very quickly and we were focused on the day-to-day processing of documents using a reasonably proficient database designed by a local software house."

Infonic's Document Manager system was selected on the basis of product performance, advanced functionality, support capability and a perceived ability to see the project through to implementation to ongoing maintenance. There was also a close match between the Document Manager technology and Sutton Barnard's in-house developed SQL server system.

CASE STUDY - Document Manager - Sutton Barnard



“For general client enquiries, our staff can call up database information instantly alongside images of associated paperwork – all on one screen, easily and quickly.”

Infonic (UK) Ltd

Infonic House
Copperhouse Court
Caldecotte
Milton Keynes MK7 8NL
t +44 (0)1908 366 388

Infonic Document Management LLC

#3721 Executive Center Drive
Suite 264
Austin, TX 78731
t +1 (512) 345-4600

Singapore

3 Temasek Ave, #34-02
Centennial Tower
Singapore 039190
t +65 6549 7022

Germany

Chilehaus A
Fischertwiete 2
D-20095 Hamburg
t +49 171 9941342

Benefits of Document Manager

- Faster production of quotes and insurance processing
- Improved access to all documentation for all staff
- Reduced use of paper in the office
- Vastly increased office space following the removal of numerous filing cabinets
- Improved customer service
- Significant time savings for staff
- Central management and storage of records

The Document Manager solution

“Document Manager ensures that all our documentation meets the standards required by market regulators. The insurance industry is tightly controlled. For example GISC and FSA (Financial Services Association) rigorously enforces rules and regulations on how to conduct business”, says Allison Barnard.

“Document Manager is ideally suited to deliver this capability” says Allison Barnard, IT Director. “It delivers a robust and reliable solution to managing the rapidly increasing volume of documents. It integrates ideally with our system and it has provided a system that we are now actively marketing to other brokers. The potential market is around 7,000 broker firms and Infonic is actively assisting us.”

“The bottom line is a system that provides reliable administration, gives us immediate access to any file or document in an intelligent and practical way, saves time and frees our professional staff to focus more effectively on sales and customer services,” says Allison Barnard.

“There are three aspects to the project’s success: the Document Manager product, Infonic’s technical ability and the partner relationship between us. Essentially, we have built a business benefit system from a mere client database. We also have a solution that we can market and make profit from.”