



**12 Million**

documents managed electronically

**165**

staff members trained in just one week

**\$62,800**

saved annually on personnel costs, postage, and reallocated salaries



**Case Study Summary:**

**Digitech Systems Reseller:**

Daida

**Challenge:**

Insurance policies stored on microfilm slowed customer service and created inefficient business processes

**Solution:**

PaperVision® Capture, PaperVision® Enterprise and PaperVision® Enterprise Workflow

**Results:**

Electronic documents increase efficiency, save money, enhance customer service and enable stronger business continuity strategies

# PaperVision® Product Suite Saves Homesteaders Life Company \$62,800 Every Year

Homesteaders Life Company works alongside funeral homes to make difficult days a little easier. Since 1906, Homesteaders has provided insurance funding for advanced funeral plans. The company is committed to the success of its funeral home customers and to providing long-term security for policy owners, customers and employees.

Carolyn Strawn, Manager of Imaging and New Business, knows the benefits of immediate access to policy information and recognized that the company’s microfilm records system was no longer capable of delivering the speed and quality of service their customers demand and deserve.

Implementing Digitech Systems Enterprise Content Management (ECM) system saved homesteaders \$62,800 in the first year alone! It also increased efficiency and improved the customer service process.

## The Situation

Homesteaders Life Company is the nation’s leading pre-need insurance funding provider, offering funeral planning solutions to more than 3,000 funeral homes in 44 states. The 107-year-old mutual insurance company is owned by its policy holders and employs nearly 170 people. In 2010, it generated approximately \$425 million in revenue with nearly \$2 billion in assets.

Previously, Homesteaders managed its insurance policies on paper and microfilm. With millions of documents to maintain, a separate storage room was needed to house all the records. Remote paper files and shelves of microfilm made information retrieval a burden to employees. The storage room was so crowded with files and microfilm jackets stacked high and out-of reach.

Four employees were dedicated to retrieving policy records, and files took anywhere from one to 24 hours to retrieve, leaving employees and customers waiting for information. To make matters worse, some older microfilm images were fading with age.

Knowing that the company archives were bound to expire, Strawn started investigating ECM technologies that could create more permanent records and enable employees to answer customer questions and execute tasks right away. This led her to a Digitech Systems reseller who introduced her to PaperVision® Enterprise, an on-premise ECM system. Strawn decided to implement the software, because it offered a flexible solution that could change as the company's needs transformed over time. "Everything could be converted in the timeframe we needed. They were able to convert paper, microfilm and microx records and do it for a price we were willing to pay," said Strawn.

## The Solution

To get Homesteaders started, the reseller provided services to convert the stored archives to electronic records. Millions of microfilm documents were scanned and imported into PaperVision Enterprise, and new employees could then instantly search and retrieve electronic records. Homesteaders now uses PaperVision Capture, so their own employees can scan new and incoming documents. Implementation was fast, because the software is easy to use. "Training didn't take long at all—just one week for all 165 people," Strawn explained. "Even the scanning and imaging team was trained in less than a day."

## Recognized Benefits

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"We are starting to scan documents at the front end as soon as they are received. This eliminates paper documents getting passed around and gives the customer service department immediate access to information. Our PaperVision® Enterprise ECM system is so efficient that we will expand this technology to more of our document management practices."

- Carolyn Strawn, Manager of Imaging and New Business

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## Recognized Benefits

Today, the company manages 12 million electronic documents, which better serves customers, increases efficiency and cuts costs. Digital management of agent files, funeral records, bank and beneficiary information enables the customer service department and employees in four other departments to boost productivity and reduce the cost of information management.

With electronic archives, employees are not spending time retrieving, copying or faxing microfilm files. Today, only two employees are needed to scan and index 18,600 pages of incoming mail each week. Even with the company's recent growth, these two employees have been able to handle the increased workload. Using PaperVision Capture, they scan, index and export the documents to PaperVision Enterprise, where they are immediately searchable. "All new documents are available within 24 hours," said Strawn.

"We run the scanner continuously and index the documents at another desk which helps accelerate the imaging process." Barcode and match-and-merge technology also make indexing fast and precise. Employees do minimal data entry, because key index values like customer name, agent and funeral home numbers are automatically

populated using information stored in their LifePro™ database. With PaperVision Enterprise WorkFlow, imaging employees have shortened document processing times and save hundreds of hours of productivity each week. Employees see where files are in the process and see what work step they're in. Changes to customers' contact and beneficiary information are quickly processed and immediately effective.

Today, documents are safer all around. "With the Digitech Systems technology our file system is very accurate. I never hear of missing or misfiled information," Strawn noted. Plus—critical business records are permanently preserved and disaster recovery strategies have never been stronger.

If a catastrophic event occurs, the company can access their data within 48 hours. "Not only are our files effectively managed and protected, we're better positioned to serve our customers for the next hundred years," said Strawn.

Processing documents is equally as easy with automated document routing—it's also cheaper. "We just started implementing PaperVision Enterprise WorkFlow, and we're already experiencing productivity savings," said Strawn. The company saves \$45,000 in personnel costs each year. The ECM system cuts postage costs too.

## About Daida

Daida, founded in 1964, is a business process services company committed to bringing innovation and creative solutions to complex problems to organizations nationally. They offer document digitization services, Enterprise Content Management, and data storage and archiving. To learn more, please call a representative from Daida at 877-924-8680, email them at [info@daida.com](mailto:info@daida.com), or visit their website at [daida.com](http://daida.com)

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