

Case Study  
UniServe™ | DMS

# Boosting operational productivity and service activation with Document Management System

The insurance provider is a joint venture between one of India's leading business groups with interests in telecom, agri business and retail; and the world leader in Financial Protection and Wealth Management. Headquartered in Bangalore the company currently has 40 branches across India.

With a vision to become the leader and preferred company for financial protection in India, the insurance provider offers its customers—individuals and businesses—a wide range of products and services that meet their insurance needs.



## Challenges

The insurance company needed to store a large number of documents for a long period of time. These documents comprise of application forms, contracts and documents related to policy claims and underwriting. All these documents are paper-based and hence there was a huge dependence on manual maintenance. As a result, the company faced several challenges both on the operational and strategic fronts:

- Paper storage was running into barrage of documents causing bottlenecks while retrieval and retention
- Huge storage and manpower costs due to unorganized nature of document retention
- Due to manual handling of documents, employees/agents were losing out on approval processes while pursuing new business
- It was impossible for managers to track the status of applications or claims
- Time consuming and manual filing procedures leading to misfiling and lost documents

The problems were further compounded due to the myriad policy types and regulatory compliances. To overcome all these challenges, the insurance company was looking for a robust solution that can handle volumes of data while still performing at peak levels of productivity

The solution also resulted in reduced costs on document storage, duplication, transit and security and established a dependable disaster management system.

## Document Management System built on UniServe™

The insurance company chose Intense's Document Management System solution built on UniServe™ to automate all the processes that lead to application filing and approval. The document management solution ushered in automated processes backed by a robust electronic storage system. This eliminated the need to file and re-file customer information and also enabled business users to instantly search and retrieve information.

The solution was seamlessly integrated with the insurance company's core applications to get the customer details and the relevant policy information. Additionally, the solution helped managers to monitor employee productivity and optimize workload on resources.

- Hierarchy based storage and classification of documents for faster retrieval and response times
- Intelligent document tracking and since documents are classified are stored and indexed at the time of creation
- Process owners are enabled to maintain document repository at a centralized location which gave the insurance company the most needed flexibility to perform the integral task of handling tasks efficiently with ease
- Classification of content into files and document types helped protect business- critical content from unauthorized access
- Enabled easy search and retrieval since every document was indexed with parameters based on their type, category, subject, period, etc
- Features like Bulk Document Upload/Split and Indexing merging facilitated quick digitization and identification of documents

## Benefits

Document Management System facilitated easy retrieval based on any specific parameter making it easy for managers to take decisions dynamically. By transitioning to an electronic document management system, the company now has more agile processes, thus improving on service levels and customer delight.

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