



O'Driscoll O'Neil Customer Case Study

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Integrated Electronic Document Management

Key Benefits

Time Savings in the Business Processes

Each team now have all mail filed by 11am as opposed to 2pm with the previous manual system. A saving of 3 hours per team

Cost Reductions

There has been a reduced requirement for copier paper, stationary, etc

Redeployment of Resources

Filing Clerks have been converted to more value added resources such as Client Service Executives.

Customer Service Productivity

Staff members are empowered to instantaneously handle client requests. Requests for copy files are now delivered directly via fax or email instantly and directly from their desktop. Reducing time spent copying and printing etc
Given that the teams receive volumes of queries on a daily basis, **Niall O'Driscoll** believes that "the savings in staff time and expense have been greatest in this area"

Customer Service Quality Levels

As a result of the changes in retrievals, audit history and other processes, Client Service executives deliver faster service to clients.

1200 sq ft Office Space re-utilised.

No More Mislaid files. Enhanced Security of confidential client information.

Why Adest

"As well as immediate productivity gains and faster distribution of documentation, which is imperative to O'Driscoll O'Neil's business, implementing Adest integrated with Bitsys has improved customer service by changing the way O'Driscoll O'Neil manages information. Overall the system has been described as very user-friendly, flexible and most importantly has resulted in quicker filing and distribution of client documentation thereby reducing costs and improving service".

Overview

O'Driscoll O'Neil is a leading Insurance Broker in the Irish market which specialises in Commercial, Personal Lines and Scheme products. Established over 16 years ago, the company has always been progressive in its approach to new ideas and new opportunities concerning the cost effective delivery of quality services.

Business Objectives

In an environment of rising costs, increasing premiums and intensive competition, O'Driscoll O'Neil realised that

- The processes to deliver their services had to be made more cost efficient
- Quality of service would be a critical differentiator in an increasingly competitive market.

Implementation Strategy

O'Driscoll O'Neil wished to implement a new Broker Management System (BMS) to manage all transactions relating to Clients, Policies and Claims. In addition, they wished to integrate it with a document management solution to allow Customer Service staff instant access to all documentation relating to Clients, Policies and Claims on screen.

Using the Adest Document Management Solution, all incoming documentation, mail or otherwise, upon receipt is opened and sent to the post room. Each document is in turn scanned and electronically routed as an image to the appropriate recipient where it is electronically attached to the relevant client file in the BMS.

Simultaneously the BMS is updated to recognise that correspondence has arrived for processing and subsequently, the item is monitored throughout its lifecycle until all actions relating to it are complete. Tracking and reporting is implemented to ensure no documents are overlooked or mislaid.