

# Adirondack Trust Insurance

## Integrating Systems Provides Greater Efficiency

### Company Facts

#### Overview

- ▶ Location: Saratoga Springs
- ▶ Industry: Insurance
- ▶ Number of Employees: 20
- ▶ Website: [adirondacktrust.com](http://adirondacktrust.com)

### Success Highlights

#### Challenges

- ▶ No integration between two core systems added unnecessary steps for employees
- ▶ Limitations created challenges for scanning and converting paper documents

#### Solution

- ▶ DocStar® Series 3

#### Benefits

- ▶ Achieved new efficiencies in work processes
- ▶ Improved responsiveness in customer service
- ▶ Linked core systems to increase productivity
- ▶ Automated document scanning to reduce manual data entry



Adirondack Trust Insurance (formerly Wise Financial Group) is an independent insurance agency based in Saratoga Springs, New York, just north of Albany. The company, which offers customized insurance programs and risk management services to businesses in the capital region, has 20 employees located in one main office and two satellite locations connected via Citrix. Adirondack Trust Insurance serves a broad portfolio of clients, ranging from municipalities and universities to large, mid-size and small commercial enterprises.

Adirondack Trust Insurance demonstrates a penchant for innovation in everything from its service offerings to operations management. The company has long recognized the value of employing advanced information and imaging technologies as a means to continually improve customer service and increase efficiency. For example, it uses Sagitta agency management software from AMS Services, Inc. to handle its financial accounting, customer account management and business development functions, among others. Many of the firm's employees spend the majority of their time working with this comprehensive application.

Seven years ago, Adirondack Trust Insurance saw tremendous potential to increase efficiency and responsiveness by automating paper-intensive work processes and eliminating the need to continually house and reference paper documents. As a result, the company became an early user of DocStar document management systems, which scan, store and retrieve documents easily through an easy-to-use PC interface that requires minimal training.

Today, the company employs a DocStar Series 3 Departmental Edition to convert their paper documents to electronic images, so that it can quickly locate critical information such as signed policy applications. Employees locate and retrieve documents over the network using View software.

“Now that the two products are seamlessly integrated, e-filing is easier and less prone to human error. Retrieving a document takes two clicks of a mouse.”

—Andrew Wise, Executive Vice President | Adirondack Trust Insurance

The firm has leveraged this system—which has been upgraded over time to keep pace with technology advancements—to reap tremendous improvements in the speed and productivity of customer services. It now handles routine customer inquiries in just seconds, whereas these activities often would take several hours using the old paper-based filing processes.

### The challenge

While achieving substantial increases in process speed and efficiency with its agency management software and imaging system, Adirondack Trust Insurance remains intensely committed to continuous improvement in its business operations. To reach the next level of productivity, the company needed to focus on integration—making its two core systems “talk” to each other, exchange data and work together.

Both the agency management software and imaging system were accessible only through their own separate user interfaces. To perform job functions such as customer service, workers frequently had to toggle back-and-forth between the systems, loading software and navigating between two “windows” on

the PC. They would check the client name and policy number in the agency management system, and then use this information to locate related documents in DocStar. Over a typical workday, this process could be repeated many times, diminishing productivity and demanding hundreds of additional mouse clicks and keystrokes.

Further, Adirondack Trust Insurance could not leverage customer data seamlessly across its entire business, creating another barrier to maximizing operational efficiency. In particular, this limitation created challenges in automating the process of scanning paper documents and converting them to searchable electronic images. Customer service representatives were required to hand-write detailed cover sheets to accompany paper documents for scanning, which included information such as the transaction type, policy number, insurance coverage code and client name. All of this information had to be entered manually into the DocStar system, adding significant time and labor to the overall work process.

### The solution

To further automate its work processes and make customer data more readily available across all activities, Adirondack Trust Insurance enhanced the capabilities of its agency management software and imaging system by implementing the following software elements:

AMS Sagitta-DocStar integration software makes the DocStar system directly accessible from the Sagitta software interface without switching applications. While using the agency management system, Adirondack Trust Insurance employees now view electronic documents stored in DocStar with a single mouse click. This functionality is made possible through the DocStar Integration Agent, a software module that enables independent software vendors, such as AMS Services, to seamlessly link their applications with the imaging system.

DocStar DataLink® draws upon databases within the Sagitta agency management system to verify or supplement information used in document storage and retrieval. This software performs two critical functions. First, it verifies that the Sagitta data used to file documents in the DocStar system—such as client name and policy sequence number—is accurate. Second, it automates the filing process by automatically filling additional data including Policy Effective Date, Coverage Code, and Date of Loss.

DocStar Barcode reads and extracts key information embedded in barcodes on the Sagitta-generated cover page. It then automatically enters this data into titles, keywords and custom fields associated with the document. The module, in conjunction with Datalink, eliminates almost all of the manual data entry previously required, thereby improving the speed and reliability of the filing process.

Deployed in tandem, these optional modules enable an automated work process that starts with an Adirondack Trust Insurance employee's request to scan a document. Instead of handwriting instructions, workers print a cover sheet from Sagitta that includes barcodes containing key data from the software's client, policy, loss, or activity log screens. In a single operation, DocStar scans this cover sheet along with the related document, automatically reads data from the barcodes, and stores this information with the document, while ensuring an accurate link to the correct Sagitta client, policy, claim, and/or memo. Filed documents are immediately accessible from the four screens in the Sagitta interface.

### The benefits

With the integrated AMS Sagitta-DocStar solution, Adirondack Trust Insurance has achieved new efficiencies in its document-intensive work processes, while improving responsiveness in customer service by making all of its critical information available through a single work process.

Adirondack Trust Insurance customer service representatives now view all documents, including signed policy applications and claim forms, from within the Sagitta software interface. They no longer need to navigate between separate applications, reducing the amount of time needed for many tasks and improving workplace ergonomics by eliminating unnecessary mouse clicks and keystrokes.

But perhaps the biggest productivity improvement for Adirondack Trust Insurance resulted from the fully automated document scanning process. To convert paper into electronic information, workers now quickly print cover sheets with all the critical information contained in barcodes, place them on top of the associated document

and forward them for scanning. The agency's filing clerk simply collects and stacks all the documents and quickly scans them in a single operation without extensive keyboard entry.

Adirondack Trust Insurance executives indicate that the integrated work processes made possible through the new AMS and DocStar software significantly increased operational efficiency across the company. Further, by creating a common way to collect and find both customer data and electronic documents, the company has improved service by unlocking easier and faster access to its complete reservoir of mission-critical information.

"We have been e-filing policies, claims, endorsements, and other documents with DocStar for seven years, and we have been a Sagitta Browser user for three years," explains

Andrew Wise, executive vice president, Adirondack Trust Insurance. "Now that the two products are seamlessly integrated, e-filing is easier and less prone to human error. Retrieving a document takes two clicks of a mouse."

As the needs of Adirondack Trust Insurance have changed and grown over the years, the DocStar solution has grown right along with them. Two years ago Adirondack Trust Insurance began scanning accounts payable into DocStar. Within the past year, the marketing departments began scanning applications into DocStar and electronically submitting them to carriers. Most recently, they have started to import digital photos of buildings and vehicles into DocStar. All of these applications have led to incredible time savings along with tremendous savings.

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## About DocStar

Helping businesses translate vision into action for more than 20 years, DocStar delivers a flexible and innovative enterprise content management and process automation platform. Easy to implement and use—both in the cloud and on premises—DocStar proven technology and global process expertise empowers organizations to operate at peak performance, navigate change, and grow.



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