

# Delivering Superior Customer Service

In a highly competitive market, the quality of customer service is a critical factor that determines an Insurance Agency's success in capturing market share and growing revenues. Insurance documents must be managed efficiently and accurately, and quickly made available to facilitate timely customer service. Any delays caused by lost or unavailable records can result in serious customer dissatisfaction and could result in lost future business.

The typical medium-size insurance agent with about \$3 million in sales handles a minimum of 20,000 documents per year. This volume taxes the firm's resources: physical space must be allocated for storage of paper documents in file cabinets; full or part time personnel are required to sort, file, manage, and retrieve information, and copiers and fax machines are needed to duplicate and distribute original documents. All these demands add costs and shrink agent's profits.

The laborious process of sifting through large volumes of paper to retrieve information can take several minutes or even longer - in many cases while a customer waits impatiently on the phone. Often, these situations require a return phone call, which results in the inevitable "phone tag" so that the customer inquiry goes unfulfilled for hours, or even days. For agents and brokers, fast information access is fundamental to offering responsive customer service, a capability that will differentiate them from competitors.

## **Stop the Paper Madness!**

Put an end to the paper with a document management solution. Document management gives you the ability to work a file faster than if you had the actual paper in your hand. When a call comes in users will have the file right in front of them instantly rather than wasting time looking them up or searching through file cabinets. Customer service will increase, the CSR's time will be made more efficient, and paper costs will be at a minimum.

## **Improve Customer Service and the Perception of the Agency through Imaging.**

The ability to retrieve every document pertaining to a customer within seconds, thus eliminating the need to place customers on hold or call the customer back is a major step forward for the agency. The immediate printing, faxing and emailing of any document at any time completes a change in expectations for customer service efficiency from both the agency's and the customer's perspective.

Producers and Management can learn how to retrieve documents after only a few minutes of training instead of going to CSR's for assistance.

Document management will also enable your Customer Service personnel to handle more accounts without increasing staff to handle your growth. This is especially true when the document management system is tightly integrated with the agency management system being used by your insurance agency. In this scenario, your Customer Service personnel can retrieve



documents directly from the agency management system

**Eliminate File Cabinets and Paper Files.**

Document management allows an agency to eliminate the creation and retrieval of Paper Files. The time and space savings will be quite remarkable when evaluating the cost and benefits of implementing a document management solution.

