

Document Manager reduces the risk

Bristol-based Sutton Special Risks Ltd, part of the Sutton Group, specialise in arranging difficult-to-place liability insurance for the Fire Protection, Security and Cleaning industries. A GISC-registered insurance broker, it is the only broking house in these sectors that has not limited the type of business written following the September 11 terrorist attacks.

Document Manager is helping Sutton Specialist Risks to streamline its business processes, improve customer care, and save space to accommodate additional staff.



sutton
specialist risks

Company: Sutton Specialist Risks Ltd

Country: United Kingdom

Industry: Insurance

Profile: Bristol-based Sutton Special Risks, part of the Sutton Group, specialise in arranging difficult-to-place liability insurance for the Fire Protection, Security and Cleaning industries.

Key Drivers: To scan historical documents at low cost. To use office space for staff and not for filing cabinets.

Paperless environment – looking to the future

“Like many companies in the broking business, we were using the traditional paper filing cabinet system, lever arches, carousels, etc,” says Sutton Special Risks Account Executive Sandy Fogg. “We originally looked at the prospect of a document management system over three years ago and looked at a number of prospective solutions. None really offered what we wanted – which was something easy and friendly to use, had an attractive look-and-feel, and would let us store information and documents the way we wanted to without being shoehorned into someone else’s idea of how we should store it. Basically, we decided that the technology we needed just wasn’t there yet.”

However, as the firm’s business continued to grow, it recruited more staff and increasingly, the pressure built up to save space to accommodate them. “We had millions of documents in files going back to the late 1980s in large cupboard filing cabinets and four-shelf carousels full of lever arch files,” says Sandy Fogg. “We didn’t want to move to new offices and so a year ago we decided to look at document management systems again.”

Choosing Document Manager

The Document Manager solution was selected for its user-friendliness, ease of use and reliability. The company formerly had no experience of document management systems and moved to the Document Manager system from a traditional paper filing cabinet environment. A key requirement was the ability to scan in millions of historical documents going back to 1989 – easily and inexpensively.

The solution will also enable the firm to be better prepared to meet Financial Services Authority (FSA) compliance regulations.

CASE STUDY: Document Manager™ – Sutton Specialist Risks Ltd



“We’ve got a system that works the way we want it to. It’s made all our jobs easier; lets us work more productively. Implementation was trouble-free and the technical support is always available and friendly.”

Sandy Fogg
Account Executive

Benefits of Document Manager

- Faster access to client details, no more rummaging through filing cabinets
- Improved customer service
- Increased job satisfaction for staff
- Reduction of filing cabinets, allowing more staff to be accommodated
- Any number of users can access any file simultaneously
- Audit trail of who has been accessing specific documents and when
- Emailing documents to clients is now easy – no more time-consuming faxing or posting of documents

The Document Manager Solution

“Our criteria were pretty much what they had been several years before when we had first looked for a solution. The user-friendliness and pleasant look-and-feel of the software we needed were not just cosmetic niceties. Our staff is computer literate – but moving from filing cabinets to full-scale Document Management System technology in one go was going to be a bit of a jump. We wanted a system that people wouldn’t be afraid of, that they would like using because it was easy and helped them work more effectively and productively.”

“Document Manager was chosen on the basis of its functionality, attractive look-and-feel, general user-friendliness and ability to integrate with our existing software. Implementation went smoothly without any surprises and took four days. Now, all our staff use it – initially twelve when we started last July; now eighteen. We just don’t use paper anymore,” says Sandy Fogg.

“Document Manager lets any number of users access any file simultaneously and the audit trail means we can track who has been at which file and when. This is important for Financial Services Authority (FSA) compliance regulations. Another major benefit is the fact that it makes sending an email much easier. Previously, a lot of the documents that needed to be sent couldn’t be emailed at all. They had to be posted or faxed. No more of that.”

“Document Manager enabled us to get rid of all the filing cabinets and lever arch carousels, which generated enough space to comfortably accommodate new staff. While this was initially the perceived main reason for getting a document management system, the other benefits are equally important and go to the heart of doing business more effectively.”

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