

A Lindenhouse Case Study

**Alan Boswell Insurance,
Norfolk**



The Alan Boswell Group offers insurance, risk management, investment and other financial services to clients throughout the UK. Formed over 20 years ago, the company is now one of the UK's leading regional insurance brokers, with over 110 staff based in East Anglia at its Norwich and Attleborough offices.

Alan Boswell Group attributes its successful growth to a track record of providing innovative and high quality products coupled with the very best in personal service for its clients - be they private individuals or companies large and small.

The rigours of regulation

As with most successful, forward-looking companies, the Alan Boswell Group likes to plan ahead. For this reason, the company spent some time in 2003 investigating document management systems. Richard Hartley, IT manager explained why:

"We were aware that regulatory changes were on the way which would affect operations within the general insurance industry. We anticipated that one of the things that the regulators would be looking for was a clear audit trail in respect of each client, each claim and each policy."

"Insurance is a 'virtual product' and sometimes it seems that the only way it is made tangible to people is through the generation of vast amounts of paper. We didn't want regulation to mean more paper. We wanted it to mean less."

The company began to investigate a number of document management systems, but as soon as they met up with Lindenhouse, they knew that they had found what they were looking for. Richard Hartley explained why it was such an obvious decision:

"The thing about Lindenhouse is that they didn't just want to sell a document management system in isolation. They wanted it to work for us as seamlessly as possible."

"Very cleverly, Lindenhouse have spent a lot of time working to ensure that INVU, the system they supply, integrates with as many leading back office systems as possible. As soon as they told us that they could set up INVU so that it integrated completely with Misys, the back office system that we use, the proposition became unbeatable"

The joys of integration!

Lindenhouse began the process of installing INVU in September of 2003. The integration with Misys meant that the new system was 'housed' within a familiar framework for staff, meaning that the need for training was kept to a minimum and met with little of the resistance that sometimes accompanies systems innovations.

So what impact has the introduction of INVU had on the Alan Boswell Group?

"It's fantastic, we love it", says Richard Hartley. **"We used to**

have departments where there were more filing cabinets than there were people. Now, everything is scanned electronically and we have no need to keep the paper. We now have over 700,000 documents scanned into the system and are adding to that number at a rate of 1,000 a day, including back-scanning. We've disposed of the filing cabinets and freed up a lot of office space!"

Prior to their involvement with Lindenhouse, the staff at the Alan Boswell Group would store all paper in date order. Although most proposals were electronically submitted, the Insurers would still carry out random spot checks where they could demand to see all the accompanying paperwork for a selection of proposals. This presented a nightmare for staff trying to work through the chronologically filed paper store. It was a process that could take hours. Now, using the INVU system, there is a proper audit trail for each case and each item of paper. What's more, documents are filed using 10-12 separate index values (specified by Alan Boswell Group staff and set up by Lindenhouse). This means that scanned documents are cross-filed and can therefore be retrieved by client name; by policy number, by claim number, by insurer or whatever search criterion best suits the administrator. Insurer spot checks can now be dealt with in a matter of seconds.

The new system also saves a lot of research time. For example, stray cheques that come in without adequate explanation attached can be traced back to the relevant case by searching the system for a matching payment amount. Another example is where the Commercial Department gets a case which is an unusual risk type such as a window-cleaner; all they need to do is type "window-cleaner" into the system and it will call up documents relating to any other window- cleaners in the client base and thereby create a short-cut to find the relevant insurance market.

Any outbound documentation from Misys goes "ccINVU" which means that a copy is automatically stored using one of Lindenhouse's exclusive integration products- CcInvu: Print. And that's not just a blank word document but a true copy of the letter, complete with overlays of logos. This means that if ever there is a dispute in any case; Alan Boswell Group can supply true copies of all correspondence relating to it.

Richard Hartley sums up:

"We used to keep more paper, now we keep more useful information without the need for keeping paper. The system saves us space, improves workflow and provides enhanced customer service. It's delivering exactly what Lindenhouse promised us that it would."

Now we are looking at INVU as the replacement for another document management system for 20 users in our ABCO financial services division where it will be used in conjunction with 1st Software's Adviser Office product."

About Lindenhouse

Lindenhouse provides quality IT products and services to a wide range of clients. The company is focused on document management solution provision and develops bespoke software to provide integration to all insurance and financial services back-office systems and to practice management systems in both the Accountancy and Legal sectors. Lindenhouse have installed 1700 document management systems to date and are rightly proud that it retains 95% of its support contracts – a testimony to the dedication and professionalism of the company's technical staff and help desk.

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INVU