

A Lindenhouse Case Study

Clark Thomson Insurance Brokers Ltd, Perth.



One of the largest independent general insurance brokers in Scotland, Clark Thomson has its head office in Perth and branches in Dundee, Edinburgh, Elgin, Inverness, Keith, Kirkwall and Oban. The company's remarkable expansion over the past four decades has been achieved mainly through client recommendations prompted by a consistently high level of service. It has built a reputation for providing an informed and professional service to industrial, agricultural, commercial and private clients throughout Scotland.

Clark Thomson has attained Chartered Insurance Broker status. This prestigious title conferred by the Chartered Insurance Institute requires a commitment to maintaining a qualified and professional workforce and to ethical good practice. Professionally qualified commercial insurance personnel have an in-depth understanding of all aspects of commercial cover, whilst personal lines staff are able to provide competitive terms for home, private motor and other insurance requirements.

Commercial insurance categories catered for include: office & retail, property & property owners, construction & allied trades, hospitality & leisure, agriculture, manufacturing & engineering as well as motor & associated trades. Personal insurance offered includes cherished & collector's car, motorcycle, breakdown cover, private home, holiday home, boat, caravan, single trip & annual travel.

"As our website proclaims, great emphasis is placed on the close relationship between Clark Thomson and its clients," comments company IT manager Stewart Hunter. **"Our network of branch offices, with over 150 staff based at eight locations, exists to support this ethos. Inter-branch communication and rapid authorized access to client records are crucial in such an operation.**

"We opted for a computerized document management system some years ago but, more recently, felt that this needed replacement with a system with added functionality better suited to the needs of a substantial but cost-conscious business

like ours. Our search led us to the door of Lindenhouse Software, whose Virtual Cabinet document management system offered the capabilities we needed, including full integration with our existing software systems, at an attractive price.

"Like many insurance brokers, we use Open GI software systems from the leading provider Open International Group. We knew from experience that any upgraded document management system we selected would need to integrate well with Open GI. The Lindenhouse team demonstrated an understanding of this and had clearly amassed huge experience of integration with Open GI and other systems used by intermediaries. Their package really stood out for us and we liked the way it could be rolled out in stages so that we could, for example, bring in the human resources function later on with Version 2 of Virtual Cabinet."

Virtual Cabinet is proving to be the ideal upgraded system for Clark Thomson. It is a complete information management solution that stores, tracks and manages all office paperwork and allows information to be held and shared securely. Clark Thomson can now enjoy substantial benefits, achieving even better client service and satisfaction. A clear audit trail is provided and regulatory compliance is enhanced. The system also improves archive security, allowing the destruction of hard copies of documents as records in Virtual Cabinet may be accessed efficiently and compliantly.

Lindenhouse Software is one of the UK's leading document management system providers and its Virtual Cabinet product enables all users to benefit from an affordable solution. For a very modest cost per individual user per month, Virtual Cabinet offers the essential features of expensive systems, and much more. Insurance brokers such as Clark Thomson, financial advisers and other businesses gain valuable competitive advantage. Company personnel may be enabled to access information whenever or wherever they may be talking to a client and information is easily shared between authorized personnel. Furthermore, de-cluttered office space can be used more productively and profitably.

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.

For more information, please contact Mark Woolley at Lindenhouse.

Telephone: 01223 492266 Email: info@lindenhouse.co.uk Or visit: www.lindenhouse.co.uk