

Insurance Company Eliminates Mailing Policies to Agents

It Cut One FTE and Additionally Saves Over \$2,000 per Month on Mailing and Printing

Using OctoTools™ PDF Extract

Case Study 24

Problem:

The insurance company was printing and mailing policies and endorsements back to its agents on a daily basis. Each document also had to be manually indexed (approximately 500 per day) and fed into the company's DocuWare Document Management System. One full-time and several part-time salaries were devoted to these services. Additionally, the costs of printing and mailing exceeded \$2,000 per month.

Solution:

OctoTools™ PDF Extract was chosen to eliminate most manual effort. The cover pages and policies, normally printed using insurance-industry proprietary printing software, were converted to PDF. A 'cover page' was added, containing the distribution information, including e-mail addresses, network directory for saving, printing instructions and DocuWare indexing information. When reading the cover pages for document distribution and archiving, for the customer wanted an error free environment. OctoTools extracts the ASCII characters directly out of PDF documents, delivering **100% accuracy**, while OCR tools would have read errors and would have to be corrected manually. OctoTools PDF Extract was able to automatically email the document as well as store the indexed documents in Docuware without any manual intervention

Benefits:

1. Improved turnaround to agents by eliminating mail delay.
2. Eliminated one FTE and additionally cut out over \$2,000 per month in printing and mailing expense.
3. Eliminated manually scanning, indexing and filing processes.
4. Improved accuracy to 100%.

Products Required: [OctoTools PDF Extractor](#) , Docuware, OctoTools Docustore Connector, PDF995