

The Philadelphia Contributionship Implements Workflow Automation and Enjoys a 300% Efficiency Boost in Customer Service



THE PHILADELPHIA CONTRIBUTIONSHIP

CLIENT

The Philadelphia Contributionship

PROBLEM

There was no way to measure how many change requests came in, how long they took to process and if they were completed.

SOLUTION

ECM Toolbox's Workflow

EXECUTIVE SUMMARY

The Philadelphia Contributionship (TPC) is a truly unique company: it was founded by Benjamin Franklin and began issuing fire insurance policies to homeowners in 1752.

Many TPC employees have been with the company for 10-20 years and some of the procedures are just as old. Manual, paper-based processes with in-boxes on people's desks were par for the course. TPC's IT Leadership was mandated to implement solutions to increase efficiency, improve control and save money. CASO was brought in to implement ECM Toolbox's Workflow with EMC ApplicationXtender document management software for use in both the Customer Service and Underwriting Departments. Two major results were achieved from this work:

- Policy change requests are now completed within 24 hours (300% faster) without having to hire any additional employees
- The productivity of managing underwriting inspections has improved by 250%, while reducing the team from 5 to 2 people

As the oldest property insurance company in the United States still doing business, implementing change at such a vaunted institution can be a challenge. According to one of their IT managers and primary change agents, "CASO has helped us get over the 'change hump.' Not only can we get things done quicker with the electronic workflow implemented by CASO, but we can also now measure productivity for staffing models and customer satisfaction."

Policy change requests
are now completed
within 24 hours



Productivity of
managing underwriting
inspections improved
by 250%



Reducing the team
from 5 to 2 people



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Richard Tamaro. I
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-TPC's Lead IT
Change Agent

A 300% EFFICIENCY BOOST IN CUSTOMER SERVICE

Change requests from 120,000 policyholders arrived by email and were manually routed using Microsoft Outlook. Before ECM Toolbox Workflow, there was no way to measure how many change requests came in, how long they took to process and if they were completed. Changes took between 3-10 days. Policyholders and 500 third-party insurance agents demanded a higher level of customer service.

Change requests are now completed within 24 hours, a productivity improvement exceeding 300% and without having to add a single employee. The number of incoming change requests, and the time needed to process them, are now measured. Service Level Agreements have been established and measured against so the right staffing levels are in place. This is especially useful for capacity planning during peak periods to avoid having to "throw bodies at it" as was done in the past.

A 250% PRODUCTIVITY INCREASE IN UNDERWRITING

TPC Underwriting uses email and Outlook to manage tasks. ECM Toolbox Workflow allows TPC to measure incoming emails, manage email threads and to measure the department's responsiveness to over 500 agents.

More importantly, TPC now effectively manages 400 property inspection requests per day. Third-party inspectors visiting the property conduct an inspection and now submit a report with photos electronically.

Before ECM Toolbox Workflow, inspections were manually reviewed and put in a "done" folder on a file server. Today, TPC measures how many come in and are completed per day. The team of five people once needed to process all inspections is now completed by a team of two - a 250% productivity improvement.

THE INTANGIBLE IMPACT

"Because we're not a big company, CASO really had to roll their sleeves up to understand what we're doing. There wasn't a whole lot of margin on either side, so they really had to hit the nail on the head," said TPC's lead IT change agent.

"CASO's developers were phenomenal from project management to the development team to their CEO, Richard Tamaro. I don't know if could've gotten what we needed without them."

ABOUT THE PHILADELPHIA CONTRIBUTIONSHIP

The Philadelphia Contributionship for the Insurance of Houses from Loss by Fire was founded by Benjamin Franklin and his fellow firefighters to provide fire insurance to homeowners in Philadelphia and the surrounding region. The company issued its first policies in 1752.

ABOUT CASO DOCUMENT MANAGEMENT

CASO has been an innovator in developing practical, cost-effective imaging services and document management systems since 1994. With a management team that has more than 100 years of experience between them, they have a proven track record with even the largest commercial and government customers. CASO offers a full-range of imaging services or a comprehensive custom solution tailored to each company, industry or specific project. Their New York and Texas offices support hundreds of regional and national clients in government, finance, education, healthcare, manufacturing and other sectors. To learn more about CASO, call 888.388.CASO or go to www.caso.com.