

Top Insurance Provider Underwrites Success with the Power of etfile and Canon

Organization:

Heffernan Insurance Brokers, one of the largest full-service, independent insurance brokerage firms in the United States

Industry:

Insurance

Solution:

Etfile Enterprise Content Management (ECM) and Automated Workflow



HEFFERNAN INSURANCE BROKERS

A Member of the Heffernan Group



“The etfile application and Canon scanners are performing better than we anticipated and have enabled us to be more responsive to customers through faster service times and reduced errors.”

– **John Petersen**
Chief Information Officer,
Heffernan Insurance Brokers

The Customer

With more than 20 years of experience, Heffernan Insurance Brokers is one of the largest independent insurance brokerage firms in the United States. The company provides insurance and financial services products to a range of businesses and individuals. Heffernan was named the “Top Mid-Sized Broker in the United States to Work For” in 2009 by Business Insurance Magazine.

“Since 1998, we’ve steadily built a reputation as one of the nation’s top insurers -- specializing in non-profits, healthcare, hospitality, construction, and real estate. With nearly 400 staff members, it’s our commitment to quality service that drives our success. Essential to making this happen is seamless and efficient management of critical information,” said John Petersen, Chief Information Officer at Heffernan Insurance Brokers.

The Challenge

Heffernan is a market leader and one of the fastest-growing businesses of its kind. Having experienced double-digit revenue growth each year since its founding two decades ago, the company steadily built its portfolio of services. This increased business also meant more paper to manage across headquarters and seven remote offices. Unfortunately, the highly manual process in place was causing issues.

Continued Petersen: “Synchronizing the flow of information between our headquarters and seven remote offices became increasingly difficult because of our rapid growth. Our business processes were heavily reliant upon paper-based applications, forms and original documentation – causing delays in filing and managing. This directly impacted customer service.”

The Approach

In 2002, the company realized there must be a

CASE STUDY | Heffernan Insurance Brokers

better way. The firm embarked on a journey to transition all paper-based documents to electronic form using an existing client database application. To bridge manual and online workflows, they turned to Enterprise Document Management (ECM) and Automated Workflow from etfile.

The etfile solution is built from the ground-up to provide a robust Enterprise Content Management (ECM) and Automated Workflow solution for any sized business. More than document archiving, etfile's flagship client/server file sharing and document storage and retrieval system consistently delivers the highest levels of efficiency and productivity for global customers. The business solution is easily integrated into leading ERP and CRM systems – as well as any external client, customer, or reseller offering.

etfile can also be integrated with nearly any back-end system using Canon's high-quality scanning solutions. This made it extremely easy for Heffernan employees to scan, label, classify and store paper documents, photos, and e-mails. This information is then automatically routed to the correct person in the workflow chain. etfile's robust search, find, and verify capability also helped Heffernan easily retrieve and share documents.

“We work exclusively with Canon scanning products because they are among the highest quality and most reliable on the market.”

– *Mark Linton, President at etfile.*

“By integrating our solution with Canon scanners, customers can achieve high productivity with minimal training costs – resulting in faster return on investment and lower total cost of ownership.” Mark concluded.

For Heffernan, etfile implemented three Canon imageFORMULA DR-7580 production scanners for headquarters and an imageFORMULA DR-5020 production scanner at each of its seven remote sites. The 7580 is capable of capturing double-sided originals at speeds of 75 images per minute. The 5020 can scan duplex documents at speeds of up to 105 ipm.

The Benefits

Upon installation, Heffernan noticed immediate results. The company can now easily scan and route batches of documents as large as 200 sheets between offices in under five minutes. During a typical week, the staff scans 10,000 pages or more. Today, Heffernan's paperless strategy continues to pay off with capacity to spare. Nearly doubling in size since the initiative began, Heffernan manages 400 people and writes more than \$627 million in property and casualty premiums.

“The etfile application and Canon scanners are performing better than we anticipated and have enabled us to be more responsive to customers through faster service times and reduced errors,” concluded Petersen. “Our experience has been so positive that we plan on adding a new Canon DR-7580 as our growth continues.”

About etfile

Founded in 1996, Westborough, MA-based etfile is a leading provider of custom integrated, electronic document imaging, filing and retrieval systems. At the cutting edge of content management and automated workflow technology for the paperless office, the company's flagship product offering is a modular suite of capture, distribution, process management, and integration tools. Etfile's product portfolio includes scalable client/server and cloud-based content management and automated workflow management software solutions for enterprises and small-to-medium businesses across all industries. Enabling organizations to harness the power and ease-of-use of the cloud for web-based file sharing, online collaboration, automated workflows, and advanced business analytics, etfile's strategic partnerships with the world's most innovative automation vendors ensure its solutions are in full compliance with the latest industry standards for compatibility and security. For more information, please visit us at www.etfile.com.