



Case Study

Policy Renewal & Account Maintenance

The Client

A premier property insurance services company in the U.S. (Midwest). Company manages policies for numerous clients.

The Issues

- Clients need to know current status of their insured portfolios at any time
- Because of a wide range of insurers sending notices with widely varying form types, data capture staff needs to be well-trained
- Cost of capturing data promptly is escalating
- Unstructured form OCR has proven expensive and unsuccessful

The Requirements

- Reduce cost per “status change” to remain competitive
- Reduce data capture processing staff headcount
- Outsourcing vendor must be reliable, responsive, knowledgeable and offer proof of performance / quality
- Able to process incoming policy notices promptly, regardless of seasonal volume fluctuation

The Solution

CompuPacific arranged for on-site scanning of the incoming documents. The client required 5 FTEs to manage the document preparation and scanning process. Project management personnel met with the customer to develop a training manual for key capture rules and specifications. The production team developed proprietary software, including data entry screens as well as field validations and edits for the project. Tests using sample documents were completed. When live production began, images were loaded to a secured FTP site each afternoon. CompuPacific staff downloaded the image file and entered the designated data into a .txt format as arranged with the customer. Resulting output was sent via the Internet using the latest encryption technology early the following day. The entire process, from receipt of the status change to entry of specified data components into the client system, took less than 24 hours.

The Results

- The client was able to provide data to its customers within 24 hours of receipt from the insurers
- Data capture staff was reduced to less than one dedicated employee and processing cost was reduced by over 50%
- CompuPacific provides a sophisticated staff that can handle seasonal volume fluctuations and not create a back-up
- Customer satisfaction has been dramatically improved

For further information, please contact:

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