

SMARTSEARCH FOR INSURANCE



Where is SmartSearch used?

- Policy Forms
- Enrollment Applications
- Change Requests
- Benefits Packages
- Accounts Payable/ Receivable
- Human Resources



How is SmartSearch unique?

- Supports easy adoption for all users
- Advanced technology platform
- Streamlined administration
- Value driven price point

Is Your Policy Paperwork no Longer at a Premium?

Affordable, easy-to-use and reliable, **SmartSearch** can quickly transform your company into a totally digital, virtually paperless carrier.

“**SmartSearch** really impresses our clients! When a client calls and we need to find a document, I can often retrieve it in just a few seconds and then e-mail it to them while we’re still talking. It’s very satisfying to hear them exclaim ‘How did you get that so fast?’”

- Mary Bishop, Senior Client Manager, Construction Risk Partners

How will SmartSearch insure efficiency within your organization?

- Through powerful tools to manage policyholder insurance cards, coverage policies, and preprinted forms
- By streamlining business processes and providing fast, company-wide access to policy information
- With decreased administrative labor costs by eliminating paper based filing
- By automating internal policy management and enforcing document based business rules

SmartSearch provides insurers with a secure means to eliminate paper-based filing as you manage your policies with far greater efficiency. **SmartSearch** securely stores all your documents including scanned records, emails and Microsoft Office files where they can be instantly accessed from your Policy Management software, desktop or even from email. Now staff members can recall records based on a variety of search methods, including Policy Number, Carrier, or Enrollment Date just to name a few. The unique flexibility allows you to easily customize your database to the individual needs of your organization.

Leading commercial insurance and risk management firm adopts SmartSearch to insure against operational inefficiencies and critical document losses

Documents are as crucial for construction projects as steel. Whether a building or a bridge, no project ever goes forward without contracts and engineering drawings—or insurance policies. While Construction Risk Partners excels at helping clients insure against risk, doing so was flooding its offices with cumbersome paper documents. Designed for value and easy to use, learn and support, SmartSearch is helping the firm to operate more efficiently and profitably, while at the same time guarding against document losses and delivering improved client service.

“Adopting SmartSearch allowed us to manage hundreds of thousands of paper documents quickly and efficiently,” said Bill Linney, one of Construction Risk Partners’ founders and a principal with the firm. “As a result of streamlining our business processes with SmartSearch, we are benefiting from substantial savings in annual labor costs,” he added. “Important documents are now

stored securely in SmartSearch and cannot be misplaced or lost,” said Mary Bishop, senior client manager. “They are literally ‘at our fingertips’ and our clients are impressed with how quickly we can access them. SmartSearch is truly incredible. We have become enthusiastic advocates!”

Construction Risk Partners is an insurance brokerage and risk management firm dedicated to the needs of the construction industry. The firm matches contractors and other clients with insurance carriers and provides clients with a full suite of related services that include reviewing their insurance coverage and evaluating their operations and construction projects. The principals and staff of Construction Risk Partners function as business advisors, helping clients make the best insurance choices for

their individual needs and collaborating with them to achieve optimal surety solutions.

“We work with our clients on a daily basis, effectively becoming an extension of their staff, and the partnerships we build with them form the foundation of our business,” Linney explained. “We care deeply about each of our clients,” Bishop added. “This differentiates us from our competitors, most of which are huge corporations that cannot exhibit the same level of personal concern for their clients that we do.” While Construction Risk Partners works with contractors engaged in all kinds of construction projects, from office buildings to infrastructure projects like highways and bridges, the firm’s primary clientele are larger organizations with sizeable insurance requirements. The founding partners have bonded and insured billions of dollars of construction projects and the firm is growing rapidly.

For years, Construction Risk Partners had been successfully filing, storing and retrieving a variety of documents using a sophisticated, paper-based system. When the firm began working in a new business discipline, however, this manual system was quickly overwhelmed. “The new discipline required us to manage massive volumes of documents for 20 different construction projects,” Bishop said. “Insurance certificates, payroll reports and enrollment applications for about 800 subcontractors were arriving daily by e-mail, fax and regular mail.”

“Filing these paper documents became very burdensome for our staff,” Bishop continued, “and they occupied a lot of valuable storage space that could be used more productively. As the volume of paper documents increased, finding individual documents could sometimes be like looking for the proverbial ‘needle in a haystack.’ Also, many of them could not be replaced if they were ever damaged or lost. We realized that only an advanced electronic content management solution would solve these challenges, and that’s when we turned to SmartSearch.”

Now, Construction Risk Partners is using SmartSearch to manage documents electronically. As new documents are received each day, most as PDF files, they are entered directly into a SmartSearch Inbox and quickly indexed by contract number and other key reference data for reliable, nearly instantaneous retrieval when needed. Incoming paper documents are first scanned and then entered into SmartSearch. The solution proved so successful for Construction Risk Partners in the first year that the firm chose to expand its use of SmartSearch throughout the entire organization.

Hundreds of thousands of critical documents are now stored securely in SmartSearch and backed up routinely, guarding against loss. “In the insurance industry, it’s critical to have documents memorialized because claims can be filed at any time in the future,” Bishop explained. “We must be able to find the necessary information quickly and SmartSearch ensures that we can do that.”

The firm’s increased efficiency is translating into measurable cost savings and improved customer service. “I estimate that SmartSearch is saving our firm the cost of one employee day per week,” Linney reported. “Based on our clerical-level salary and benefits, this works out to more than \$14,500 in cost savings annually because that valuable time is now being utilized to perform other tasks.” “SmartSearch really impresses our clients,” Bishop said. “When a client calls and we need to find a document, I can often retrieve it in just a few seconds and then e-mail it to them while we’re still talking. It’s very satisfying to hear them exclaim ‘How did you get that so fast?’”

“I would highly recommend SmartSearch,” Linney extolled. “SmartSearch helped us eliminate paper, streamline our operations and store documents safely. If you have to manage thousands of documents efficiently and securely and you want to be able to retrieve them in just seconds, SmartSearch could be a tremendous asset to your organization.”

SOLUTION PROFILE:

BUSINESS:

Commercial insurance and risk management

COMPANY:

Construction Risk Partners

OBJECTIVES:

Eliminate paper-based filing system, streamline business operations and prevent document losses