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CASE STUDY

INSURANCE INDUSTRY

Pillar Group Risk Management Firm Leverages eCopy™ to Streamline Business Processes

CHALLENGE

- Needed to reduce paper storage in order to recoup valuable office space
- Needed to improve inter-departmental operational efficiency when handling large amounts of documents needing annotation and compilation

STRATEGY

- Installed eCopy ShareScan® on digital copiers in main office
- Installed eCopy Desktop™ on all employee desktop PCs for document editing and sharing

RESULTS

- Storage of all business information electronically. No need for costly, inefficient offsite warehouse storage of paper documents
- Instant retrieval of information and documents
- Easy annotation and sharing of documents with a consolidated, electronic audit trail
- Easy electronic completion of forms
- Easy electronic removal of document sections and seamless updating contributes to more efficient document processing

ABOUT THE PILLAR GROUP

Originally founded in Indianapolis in 1927 as an office agent for the Aetna Casualty and Surety Company, The Pillar Group has undergone a number of transformations, both in name and in the range of services it has offered over its long history. Rebranding itself as Pillar Group Risk Management in 1999, the agency has grown in volume to \$40 million and has focused its practice on commercial risk management products, primarily serving Indiana's construction market. Presently, the agency insures and services three of Indiana's largest construction projects—the Indianapolis Airport, the Lilly corporate campus, and the Clarian Riley corporate campus. In addition to construction, the agency provides insurance products and services to all types of businesses, as well as home and auto insurance for individuals.

“For us, implementation of eCopy started out as a paper reduction initiative. To our delight and surprise, use of eCopy has exploded, resulting in eCopy becoming an integral part of our company and culture, and of our ability to efficiently serve our customers.”

— Jim Clendenin

Chief Financial Officer

Pillar Group Risk Management

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Pillar Group Case Study

“We will never be paperless, but with eCopy, we will be less paper.”

— **Jim Clendenin**
 Chief Financial Officer
 Pillar Group Risk Management

AS PART OF ITS ONGOING MISSION TO SUPPLY INSURANCE-RELATED PRODUCTS...

and services that provide outstanding value to its commercial and personal customers, The Pillar Group is constantly looking for ways to improve its operational efficiency. In addition, with its rapid growth, space is always at a premium, and reducing paper would also reduce the amount of valuable office space dedicated to paper storage. To that end, the agency determined it would be beneficial to seek a means of reducing the amount of paper it used to conduct its business.

THE PILLAR GROUP FIRST IMPLEMENTED ECOPY SHARESCAN AND...

eCopy Desktop in its main office in 2002. The learning curve for users was very short, with users achieving competency in less than a week. Within a week of the first installation, uses for eCopy exploded and a second unit was installed, followed by a third. The company plans to deploy eCopy to its satellite office as well. All Pillar departments are using eCopy — and less paper. Throughout the company, all source documents, contracts, notes, and more are scanned into electronic format for processing and/or storage and distribution, providing at-desk access to critical business information.

According to Clendenin, “We are preparing to move into new offices to accommodate our continued growth, and because of our aggressive eCopy-enabled paper reduction initiatives, we will not be moving unnecessary paper, which will

save us significant time and money in this move.” Clendenin reports that eCopy has made a significant difference across a wide array of business processes, from storage and retrieval of documents to forms fill-in and OCR.

He adds, “Another terrific benefit has been the ability to circulate lists of data requiring input from multiple staff members via e-mail, with each person adding their thoughts through annotation. It makes what would normally be a lengthy dialog into quick, easy, and well-documented e-mail communications.”

In this regard, eCopy has been a tremendous benefit to Pillar’s accounting department. Clendenin says, “Each month, we get discrepancy documents from our 25 or so insurance carriers. These discrepancies must be researched, and the research for each document could involve as many as 20 people. In the past, we made copies for each of the reviewers, had them annotate their section, and then manually compiled all of the notations onto a single document. The process was a nightmare.” Now, Clendenin reports, the document is sent electronically to all affected parties and, with eCopy, their respective responses can be layered back into a single document, cutting the time spent in half.

As a result of its aggressive eCopy deployment, The Pillar Group has saved substantial amounts of time; enjoys the benefits of better documented customer files; has significantly reduced its paper, mailing, and printing costs; and has virtually eliminated the storage of paper throughout the agency.

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