



ParaDM Case Study – A Leading Life Assurance Group in Hong Kong

Client Profile

The client (the Company) is one of the leading assurance companies in Hong Kong. The Company offers individual and group insurance to its customers. The Company obtained ISO 9001:2000 QMS Certification in 2001.

The Challenges

It is a requirement of the industry's compliance that the company has to keep all customers' policies in both hard copy and digital format as record.

Previously, the company scanned the originally policies and stored the digital files by the policy numbers. As each policy had its own unique policy number, a drawback of this was that users had difficulties to retrieve policies that are possessed by a particular client at a time. Searching stored policies for reference had become time consuming and not efficient, which reduced the company's level of service.

Why ParaDM

To handle such a document-intensive process, the company was looking for a reliable and robust document management system. Its main objectives were to improve their document handling process and reduce resources spent in this area. With ParaDM's solid experience and its strong references in the market, ParaDM was finally chosen among the solutions that the company had evaluated.

The Solution

ParaDM's solution to the company included ParaDoc and ParaScan. During the scanning process, auto indexing was performed based on the unique barcode printed on each policy. The index will become the indication for the system to store the digital format of policies into appropriate directories. Also, the signature cropping function in the solution can help users to retrieve their clients' signatures easily for verification.

The Solution:

ParaScan –
Imaging Solution

ParaDoc –
Document Manage
ment Solution

The Results

Improved service level

With the system, documents can be retrieved easily and quickly. As the process of document verifications is reduced, the front line staffs can respond to the clients quickly. Such streamline has greatly improved the company's service level to its clients.

Increased office productivity

Users can search for desired documents by simply keying the name of the clients. Spending hours on searching documents from different directories or folders is no longer existed. The office productivity can be smoothen and improved.

Improved security level on individual documents

The audit trail can be recorded while ParaDoc can proactively notify relevant parties if there are suspicious actions done to the document. All applications and personal information stored in ParaDoc are completely protected from unauthorized access.

Reduced Office Space and Resources

The auto indexing and document searching functions have greatly reduced the needs of referring originally policies for information verification. Office space can be released by storing the paper documents in a warehouse instead. Moreover, users may still base on the stored index to look for the exact location of hard copies when it is needed in future.

For more information, please contact:

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