



*PaperWise for Insurance*

## SUCCESS STORY | BAILEY, HASKELL, & LALONDE

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*Vice President of Insurance Systems*

### OVERVIEW

- [www.bhlinsurance.com](http://www.bhlinsurance.com)
- BHL’s portfolio includes risk management, employee benefit, and wealth-building as well as broker and consulting services.
- Seamless integration between PaperWise and Sagitta by Vertafore as well as Microsoft ACT and Microsoft Access.



Scalability is essential to the continued success of a document management solution. This is something that insurance broker Bailey Haskell, and LaLonde (BHL) realized as they experienced corporate growth. When BHL first heard of PaperWise, a competitive document management system had already been in place for approximately 7 years. However, over time, the agency found they were beginning to outgrow their system.

With roots going back over 100 years, BHL is headquartered in Oneida, New York. They currently employ a team of nearly 100 people at ten different locations throughout the east coast. This leading regional insurance broker’s primary initiative is to reduce risk for individuals and businesses while assisting them in the success of their personal and commercial endeavors. BHL clients enjoy the advantage of one of the most comprehensive portfolios of risk management, employee benefit and wealth-building, and risk products and services available. Through their own specialists and those of their affiliated company Benefit Consulting Group (BCG) they provide complete broker and consulting services.

Between the two divisions, BHL and BCG boast 16 million dollars in annual revenue. In 2006, BCG was acquired by Oneida Financial Corporation (ONFC), parent company to BHL. Together the conglomerate makes up the most comprehensive combination of talent and expertise in their region.

### READY FOR A NEW SOLUTION

With over 100 years in business, BHL was no stranger to change initiated by growth. When they were first introduced to PaperWise, BHL was already utilizing a document management solution. “For lack of a better word, we had just ‘outgrown’ our existing system,” said Linda Findlay, Vice President of Insurance Systems. “When we found PaperWise, we were looking for a solution that would be easier to use and give us the features to make certain processes more automated. Ease of use and better productivity were key in our decision.”

Since an integration with the agency management system Sagitta by Vertafore was already built, BHL was confident that PaperWise could tailor its Suite of Applications to meet their specific needs. In addition, PaperWise holds an accreditation as a Microsoft Gold Certified Partner. This qualification gave PaperWise an upper hand when it came to working with Microsoft technologies used by BHL, including Microsoft ACT and Microsoft Access. “The ability to

integrate with our existing infrastructure was an extremely important part of our decision to use PaperWise. We needed a complete solution instead of having two stand-alone programs to meet all of our needs,” explained Findlay.

All of BHL’s existing systems were used in conjunction with Fujitsu Scanners that were located strategically throughout the company. Using the structure already in place PaperWise began building BHL’s solution. For several weeks prior to installation, the PaperWise team worked with the agency to minimize the possibility of complications during implementation. Preparation paid off and during the week of August 16th, 2010, PaperWise was installed at BHL. According to Findlay, everything went very smoothly. “Having an engineer assigned to our agency that was able to be onsite during the install process kept everything moving forward, and any questions or issues that came up were immediately taken care of,” she said.

#### TAILORED TO MEET THEIR NEEDS

Through customizations, PaperWise was able to cater to the unique requirements of BHL. Their Property and Casualty business uses a Vertafore Sagitta database solution which is crucial to the day-to-day processing of business. At the request of BHL, PaperWise designed custom features and functionality that suited the unique needs of Property and Casualty. Additional integrations were necessary for their Benefits and Financial Services departments, both of which use Microsoft ACT and Access databases. As experts in Microsoft technologies, PaperWise was able to write seamless integration pieces with both programs.

“This solution allows us to provide better service to our clients as everything is easily accessible with the touch of a button,” stated Findlay. “We are able to view documents that have been stored in PaperWise while working from our existing databases by pushing a button or hot key. This allows us quicker access to a document while interacting with a client, and in turn, enhances the level of service we are able to provide our clients.”

#### A SUCCESSFUL INSTALLMENT

When PaperWise was installed, the only setback was a connectivity and speed glitch between two of BHL’s primary offices. The issue stemmed from the PaperWise server being

located in BHL’s headquarters. Problems occurred when one of their larger offices needed to access the program and documents through a WAN connection. To resolve the issue, PaperWise created a solution that placed a complete copy of the database in the location with separate access to file cabinets to improve the speed.

Now that BHL is fully utilizing PaperWise, the agency is experiencing several returns on their investment. “The major business solution we have experienced is our ability to continue in an ongoing journey of becoming a paperless environment throughout our entire organization. The major service benefit is the ease of access to all documents which enables us to provide better customer service to clients,” Findlay explained. “Another obvious benefit is that we can now free up real estate within our offices while removing risks involved with keeping paper files. Storing documents electronically, with a backup of all our data, significantly reduces our overall risk in the event of some sort of disaster.”

#### UP AND RUNNING

Today BHL and BCG are operating efficiently with their new solutions. According to Findlay, the staff throughout the entire company is extremely happy with the product and the smooth transition. BHL found productivity has increased due to the user friendly nature of the product as well as how quickly documents can be indexed or attached to their management systems – a great improvement from how things were previously.

“I feel that PaperWise integrates extremely well with our systems,” said Findlay. “We have experienced so many benefits already.”

BHL and BCG plan to continually evaluate any other areas that may benefit from incorporating PaperWise. In fact, PaperWise Business Analysts are preparing to do an analysis of BHL’s sister company in the near future to examine the possibility of implementing a solution across their entire organization. As BHL continues to use their system, they will look into even more automation and customization. The agency anticipates setting up more PaperWise engineered workflows that will only further their ability to be more efficient and productive.