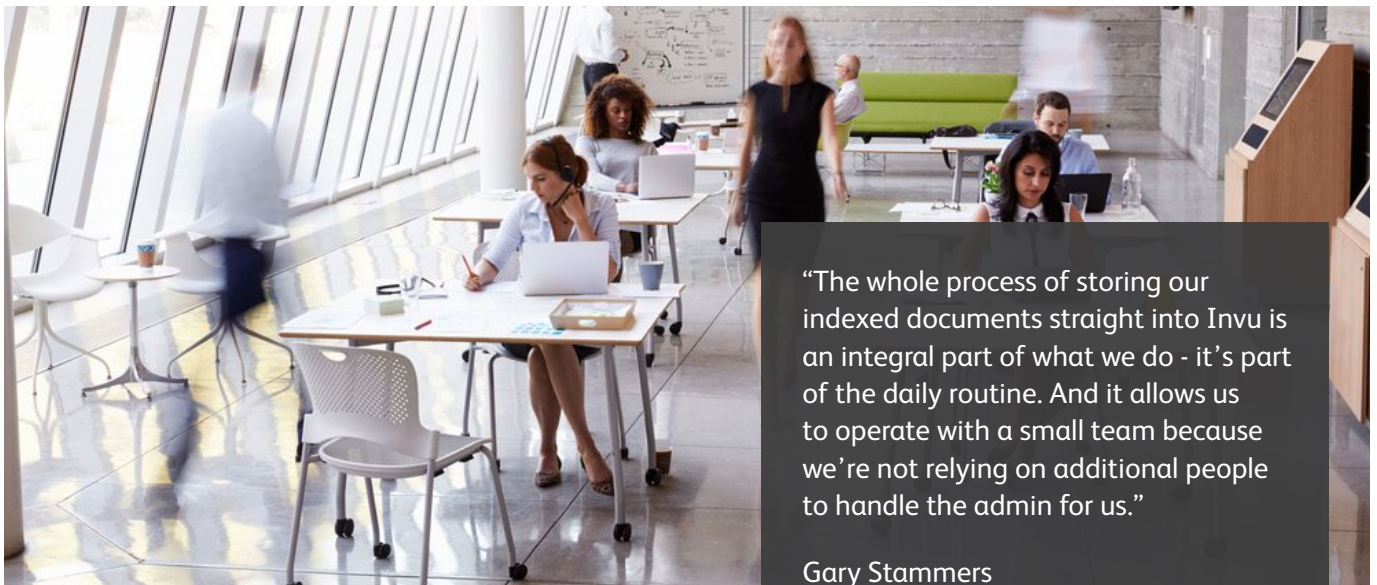


## SOLAR INSURANCE SERVICES CASE STUDY

Solar Insurance Services are a Kent based insurance broker specialising in niche products, alongside more traditional insurance needs. They work hard to deliver the best products at the best prices, including Tax Investigation Cover, Professional Indemnity Insurance, Public & Employers Liability Insurance, and a variety of Motor related products.



“The whole process of storing our indexed documents straight into Invu is an integral part of what we do - it’s part of the daily routine. And it allows us to operate with a small team because we’re not relying on additional people to handle the admin for us.”

Gary Stammers  
OFFICE MANAGER AT SOLAR INSURANCE SERVICES

### ANALYSIS

Solar Insurance Services were continually generating new documents and storing them in filing cabinets. This caused problems not only in the amount of space they took up, but also in the amount of time it was taking employees to search for and retrieve the files they required. If a document was misfiled, it was nearly impossible to find it again.

They were required to keep some policy documents for up to 40 years. As the business grew, so did the number of documents that needed to be stored securely.

With 24 filing cabinets in the office already, Solar Insurance Services needed to find a better system to file and retrieve their documents that would also free up valuable office space for their team.

### YourDMS SOLUTION

YourDMS proposed a two stage approach to solving Solar’s document storage and filing challenges.

Stage One would be the implementation of an Invu Document Management system that would securely store all digital files, with indexes, in one central place that could be easily accessed by the whole team. Storing files with indexes would allow employees to quickly search for and find the document they needed in a few seconds, and would reduce, if not eliminate the possibility of a document being misfiled.

Stage Two would be to undertake the scanning and indexing all of Solar’s existing paper documents before importing them into Invu. Solar chose to manage this in-house.

The Invu Document Management system complies with government and industry legislation for digital record keeping. Once the original paper documents had been scanned, indexed and imported into Invu, they could be securely destroyed.

## RESULT

Solar are now storing all of their archive and current documents in the Invu Document Management system. Invu has become an integral part of how Solar works with employees now managing scanning and digitising of any paper documents as and when they occur. Digital files are created and saved within Invu too. This allows the whole team to easily share and collaborate on documents.

“When we moved to our new office, we were set up and running within 90 minutes of arriving. Invu played a big part in that because we didn’t have to worry about moving thousands of paper documents. It was all electronic and portable, which made the move so much easier.”

Gary Stammers  
OFFICE MANAGER AT SOLAR INSURANCE SERVICES



As Gary Stammers, Office Manager comments, “Managing our documents properly is now part of our daily routine. It’s an ideal situation - the document goes into Invu, they index it and then they can search for it very quickly!”

Solar also store and index other types of business documents in Invu including emails.

Invu’s powerful search functions allow staff to search for and retrieve the documents they need in seconds so the team have more time to focus on core business tasks.

Storing files in Invu has allowed Solar to free up valuable space in the office which was previously taken up by filing cabinets. Managing their documents more efficiently has also meant that they haven’t had to employ more people to help with admin tasks as everything can be dealt with by the existing team.

### Moving Office With Ease

When Solar moved to a new office, Invu played a big part in ensuring it was a smooth transition. With all of their documents in a digital format, they didn’t need extra (and expensive) space for filing cabinets. Without thousands of paper files to transport, the team were up and running, able to retrieve info and operate normally within 90 minutes of arrival with minimal down time or disruption for their customers.

### After Sales Support

Solar are pleased with the after sales support and relationship they have with YourDMS. As Gary explains, “Everything has been excellent! In the past, if there has been anything we’re not sure about, YourDMS have always come up with the answer, and solved the issues for us very, very quickly. We’re very happy with the product and the service that we get.”

*The implementation of Invu Document Management has helped Solar Insurance Services to save time and money, free up valuable office space, grow the business without increasing the size of the team, operate more efficiently and improve their customer service.*