

# Using Email Management and Workflow Software to Route Information and Maximize Efficiency

By Greg Cook, Imaging Support Technician, Michigan Millers Mutual Insurance Company

At Michigan Millers Mutual Insurance Company, our number-one priority is our customers. We are constantly evaluating our processes in an effort to determine how we can provide faster turnaround time and better customer services—this has been the driver for our success for the past 125 years.

Six years ago, when we transitioned from paper-based processes to electronic document management (EDM), customers and staff realized tremendous benefits. The EDM system that we went with—DocFinity®, by Optical Image Technology—allowed us to double our claims processing load without increasing staff. Using their integrated imaging, online forms, workflow, reporting, and other software tools, we were able to streamline our 30-day medical claim review process into three days. We've been thrilled with the benefits that we've achieved with our EDM system, but we haven't become complacent. We are continually analyzing the system to discover ways in which it will allow us to provide better service. Email management is a small component of the system, but it is providing significant returns.



## Integrating Imaging with Workflow

Our Email Management module seems like a simple tool, until you start thinking about the ways in which you can push it. Email is prevalent in businesses today. Staff is comfortable using it, and it is usually the medium of choice for office communication. Prior to implementing an email management tool, we had to print email messages, then submit them to a batch to be scanned and indexed if we wanted to incorporate them into an automated workflow. The process could take hours or days, and often resulted in images of poor quality. When we incorporated an email management tool, which allowed us to import information into our EDMS, the results were impressive.

*The Claims department is able to upload hundreds of photographs into the system as email attachments. This has been a huge time-saver; our printing turnaround time went from 12-18 hours to just 5 minutes. By integrating our email management tool with digital workflow, information can be picked up and processed within 30 seconds. We can provide immediate response, and trim our processing time by 33%.*

Now, staff can upload documents into the system simply by formatting an email subject line with a policy number and an abbreviated document type. The document is then routed for processing with digital workflow. We've set it up behind the scenes so that when the policy number is entered, DocFinity Workflow allows it to query a database and to automatically populate fields with customer information. It is a tremendous time-saver for us, as we do not have to re-key customer information. Our data accuracy rate is greater than 99%, since we are no longer at the mercy of keying errors. By configuring our Email Manager module, we are able to save 1165 hours annually.

We've been using Email Manager in Personal Lines, Commercial Lines, Agribusiness, and Claims, and our users can't say enough about it. The Claims department is able to upload hundreds of photographs into the system as email attachments. This has been a huge time-saver; our printing turnaround time went from 12-18 hours to just 5 minutes. By integrating our email management tool with digital workflow, information can be picked up and processed within 30 seconds. We can provide immediate response, and trim our processing time by 33%.

### Delivering faxes as email messages

Another way that we've enhanced our email capabilities was to integrate our EDM system with Captaris RightFax. This ability allows us to deliver fax messages directly into departmental email boxes, where our email management tool retrieves them as email messages and indexes

*Our data accuracy rate is greater than 99%, since we are no longer at the mercy of keying errors. By configuring our Email Manager module, we are able to save 1165 hours annually.*

them automatically. As a result, we are able to eliminate the paper and printing costs that are associated with faxes. We're able to find information easily and more quickly. This integration has decreased turnaround time significantly. The time that it takes from receipt of a request to its placement in a workflow queue has been reduced from one day to less than an hour.

### Initiatives for the future

In the future, we're hoping to consolidate our Personal Lines Policy System and our Commercial Lines Policy System with our DocFinity EDM system. We'll use Email Manager to ensure that staff has only one queue for all work. The policy system will convert its workflow jobs, which will be re-routed as email messages and imported into our storage repository and workflow will distribute the jobs. Agency Services is also scheduled to receive the option of using Email Manager for both emails and faxes.

In addition to considerable time saving measures, our implementation of Email Manager saves the company \$3,443 annually on consumable expenditures. The 12-14 reams of paper that were consumed previously each month have been reduced to just one. The product paid for itself within the first year, and our ROI continues to increase. When you have the capability to integrate your email management tool with your workflow server, the possibilities are endless.

*To find out more about email management with workflow, or to learn more about Optical Image Technology's DocFinity software products and services, please email [info@docfinity.com](mailto:info@docfinity.com), or contact 814.238.0038 (<http://www.docfinity.com>).*

