

Case Study: Manulife financial adviser converts and organizes over 35 years of paper files using the eXadox digital filing solution



eXadox™

“For success, it is not sufficient to work hard ... you also have to work smart. Using eXadox to convert our paper files was both simple and smart.”

Pierre Deschatelets, Independent Manulife Adviser



Summary

Company: Pierre Deschatelets Inc.

Located: Montreal, Quebec, Canada

Web Site: www.pierredeschatelets.com

Activities: Investment/Insurance services

Implementation: MultiCIM, Manulife staff

Challenges

- Quickly convert 35 yrs. of paper files to digital documents.
- Semi-automate the file naming and filing process for optimum efficiency and accuracy.
- Facilitate the precise search and retrieval of both digital documents and offsite paper originals.
- Finding a simple and affordable software solution.

Solution and services

- eXadox DT Standard for staff using ScanSnap scanner.
- eXadox DT Basic for executives just requiring Search.
- Turnkey solution including installation, personalization and training by MultiCIM.
- Import of CRM contacts to auto-create eXadox folders.

Highlights

- Scanning and eXadox DT solution in full production on the same day of installation, personalization and training.
- Make provisions within eXadox for document tracking to physically locate originals in offsite storage facility.

Benefits

- Practical elimination of filing cabinets and manual filing.
- A faster and precise method to file, search, identify and retrieve files both locally and remotely.
- Disaster recovery through off-site backups.
- Easier to conform to compliancy regulations.

The adage “you can’t teach an old dog new tricks” certainly does not apply to Pierre Deschatelets, an independent Manulife financial/insurance adviser in his seventies. Pierre is quite the opposite; he has been a trailblazer when it comes to adopting new technology. He was actually the first to use eXadox to digitize and organize the thousands of client paper files that he had accumulated in his over 35 years of business.

Pierre has downplayed his gutsy decision to digitize his files and justifies it as being just practical and economical. Some of the factors that came to play were that he wanted to ease into retirement and wanted to work from home as much as possible. He realized that by digitizing his documents he can gain access to his client digital files from just about anywhere via the Internet. Another factor was that he wanted to move into a smaller office and had no interest in paying to move and house his many filing cabinets in the new office. He was not sure how to proceed so he asked Brian McLeod, a Manulife Business Technology Consultant, to help him find an affordable solution that is easy to setup and use.

Brian McLeod was an excellent resource because he had been promoting the benefits of digital documents to Manulife advisers for a number of years. He had already done some research on low cost professional quality scanners. His preferred choice was the Fujitsu ScanSnap. However, his bigger challenge was finding software that worked seamlessly with the ScanSnap. So he contacted MultiCIM Technologies, a local software developer that specializes in Fujitsu scanners. His call was timely because MultiCIM coincidentally had a development project in the works that could be used as a base to deliver a simple and affordable digital filing solution that works with any scanner. It consisted of eXadox DT coupled with a search tool that was also under development.

MultiCIM delivered eXadox DT several weeks later and managed to install and personalize it in just a couple of hours. Pierre had hired, Annik Brebner, to get trained with eXadox and to assist with the cleanup and scanning of the paper files. It took her less than 3 months to scan and index all their files using the eXadox - ScanSnap combo solution.

“eXadox helped us instantly organize our scanned files by assigning a precise structured file name to each PDF image-file and storing it in the proper client folder. Now, searching and retrieving client files is fast and we can do it from just about anywhere.”

Annik Brebner, Financial Consultant, Pierre Deschatelets Inc.

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