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## CASE STUDY

### Euro Insurances

*Car insurer makes substantial cost savings and improves operational efficiency by contracting out its file storage, scanning and shredding needs to DMG Group, which includes Filestores, Scan Image Services and Shred-it.*

**Euro Insurances was established in 1994. Based in Leopardstown, Co Dublin it is a motor insurance subsidiary of LeasePlan Corporation, and provides insurance services across 18 European countries. In recent years, the company has outsourced its file storage, scanning and shredding requirements to DMG Group. This has yielded substantial cost savings in terms of management time, made the business more responsive and given it full visibility of its documentation, both historical and current, thus ensuring it can meet its auditing and regulatory compliance obligations. In addition, the company's staff have been able to focus on their specialist roles, with further commercial benefits for the company. What began as a range of services for one department is now being evaluated for deployment throughout the company.**

#### Business Situation

Insurance is a highly paper-intensive industry, much of it sensitive and confidential in nature. For pan-European motor insurer Euro Insurances, the rapid build up of documentation was creating a major storage headache. As it did not have capacity within its offices at Leopardstown, this meant finding a storage provider that could handle this task. In 2000, DMG Group, a document management and storage specialist, was awarded a contract to store Euro Insurances' backlog of documents at its secure storage facility at Park West in Dublin.

As time went on and its business grew, Euro Insurances found that offsite storage was only part of a wider solution that was needed. Its staff were spending an increasing amount of time on simple administrative tasks and the company realised it needed a better way of managing the rising tide of documentation in its business.





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“We are a company of specialists – actuaries, accountants, auditors, insurance relationship managers etc – and every hour our staff spend doing something that doesn’t tap into those specialist skills is time poorly invested,” explains Oelia Rossi, risk and compliance manager, Euro Insurances.

There was also another issue urgently needing to be addressed. As part of its business continuity strategy, the company needed to store its critical legal and contractual documentation in a safe and secure off-site location, such that if anything happened to its main office, these documents would be protected.

## Solution

Given these new challenges, Euro Insurances realised it would have to fundamentally reappraise the way it viewed its documentation. As it did so, its relationship with DMG quickly began to evolve.

Having initially used DMG as an overflow facility for boxes of old files, Euro Insurances decided to place its most commercially sensitive documents within DMG’s top-security data vault at Park West.

“The business continuity requirement triggered a move of the sensitive documentation to a specialty supplier that could do it in a much better and more dedicated way than we could,” recounts Rossi.

DMG was then also asked to provide off-site shredding services through its Shred-It business unit. This allows Euro Insurances to comply with its obligations in terms of data protection and confidentiality. As part of its service, Shred-It manages the company’s document retention policy. This involves implementing a shredding schedule to ensure each confidential document is shredded once its retention period has ended. The company also handles the recycling of shredded paper afterwards.

But that was not all. In 2007, Euro Insurances also selected DMG for a far-reaching scanning project. Due to the complexity of its documentation, the Risk & Compliance Department was elected to kick-start the project, with other departments to follow at a later stage once the system’s potential had been proven.





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“The initial need was for storage but we realised that scanning documents and converting them to digital form would allow us to access them without having to retrieve the original copy, and several users could view the same document at the same time,” explains Rossi, who has become the de facto champion for digital document management within the company over the past two years.

“One of their requirements was that the content of everyday records would be made available as quickly as possible. But they also wanted the comfort of knowing that not only were hard copies of their documents in a safe but they would be available to view within a document management system that was compliant to good records management standards and that was backed up efficiently and reliably,” adds Stephen Mackey, business development manager at Scan Image Services (SIS), DMG’s specialist scanning company.

The scanning process, which went live in December 2007, works as follows. DMG collects boxes of documents from Euro Insurances’ offices weekly and transports them to its facility at Park West where the bound documents are broken down and indexed. After the document is scanned onto the system, it is barcoded for storage purposes so it can quickly be retrieved. It is then stored in the appropriate area – the high-security deeds vault for contracts; the media vault in the case of CDs and general storage if it’s a standard document. Finally, all of the scanned files are uploaded to a CD which is sent to Euro Insurances. The contents of the CD are uploaded for quality checking and transferred into ADOS, a document management system from Canon Business Solutions that enables files to be searched for and viewed by users.

Stephen Mackey describes ADOS, which was recommended by SIS as “a reliable and cost-effective solution that delivers what Euro Insurances wanted in terms of workflow and retrieval”.

The quality of the indexing system used by DMG has been crucial to the success of the project. Euro Insurances wanted to index documents in over a dozen different ways, reflecting the wide variety of roles within the company, and the system had to be able to support that.

The system allows the Risk & Compliance Department to, among other things, enforce company policies through exception reporting. “I can run exception reports from my system to find anomalies. For example, if our standard contract is for three years and I see an expiry date on the system that’s five years away I know there’s either an error or





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a compliance issue. It's much more efficient. I don't have to look at everything; I simply check the indexing to find problems," says Rossi.

With thousands of documents now stored off-site as well, Euro Insurances also needed a way to access original documents as they were needed. DMG has provided a web-based application, RWeb, for this purpose, free of charge. This allows Euro Insurances staff to recall files from storage simply by entering a unique document identifier – the barcode. In the case of files stored before the scanning project began, a box can be retrieved; where a document has been scanned, files can be retrieved on an individual basis.

DMG also provides activity reports for all the documents that have been recalled by Euro Insurances staff – essential for auditing purposes.

## Benefits

- **Cost savings/business efficiency**

Document management was not a core competency for Euro Insurances and so the company received a poor return on the amount of staff time spent on this activity. Handing over the task to a document management expert has resulted in tremendous time savings. Rossi estimates that Risk & Compliance Department staff spends 25pc less time every week managing paper since DMG's services were engaged, enabling them to focus on more productive work.

"It has transformed my department into one that's efficient, transparent and progressive and one that is seen as leading the way because it has made a complex process more streamlined."

- **Full audit trail**

DMG provides activity reports for all the documents that have been recalled by Euro Insurances staff. This means it can comply fully with compliance and data protection legislation. Says Rossi: "It's important to have a full audit trail for your documentation. The Risk & Compliance Department is no longer involved in the requesting, receiving and tracking of documents so we no longer need to worry about the security of documents, and documents going through many hands. The audit trail is rock solid."





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- **Peace of mind**

Knowing that critical documents are securely stored in an offsite location gives Euro Insurances the comfort of knowing that its business can survive in the event of a major disruption. Furthermore, the fact that DMG operates to the highest document management quality standards reflects very well on Euro Insurances in the eyes of its customers and becomes a key differentiator in the insurance marketplace.

“There is great peace of mind that comes from knowing that you’re in the hands of experts in the field and that you will never fail a standard, because DMG themselves are subject to many,” says Rossi.

- **Better process management**

Given their complexity, document management projects can be very challenging and difficult to manage. DMG recognises this in its approach, which is very gradual and modular rather than being ‘big bang’, says Rossi. “In terms of the number of documents, we are a relatively small company but, to us, those documents are the most important thing that we have and I think DMG understand that. They see that their relevance and value is not necessarily related to their volume. For someone to recognise that is rare, but DMG does it.”

Another key requirement for Euro Insurances was working with appropriately trained people within DMG who understood its business processes and document workflow. Rossi is satisfied that DMG has ticked that box as well.

“They came here to design a training plan for their staff, so we have people we know are looking after our documentation properly.”

- **Visionary partner**

Euro Insurances was not looking for a ‘cheap and cheerful’ solution. The quality of the service provided and the deep specialist knowledge of the partner were far more important. The company was looking to eventually become a fully paperless operation and the partner had to be equipped to undertake that journey with it.

Says Rossi: “We are used to setting standards in many ways but in terms of document





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management we could see that DMG was the standards-setting company. We like to use top-quality suppliers wherever possible.”

DMG is also willing to learn from its clients and further refine and improve its solutions based on that learning, she notes approvingly. “They are able to see the big picture. They have clients who are market leaders in their own right so they see how things are done and improve their own practices. They are a learning organisation, like we are. I think we’ve partnered well in that regard.”

Stephen Mackey agrees. “Only by sharing a degree of knowledge was it possible for them to successfully outsource part of their business to us. Partnership has been crucial in terms of everyone understanding their responsibilities and involvement with the project.”

## The Future

What began as a simple offsite storage solution has evolved into a full document lifecycle management effort, involved storage, scanning and shredding components – one that lays the foundation for a full paperless office. The systems that have been put in place with the Risk & Compliance Department are now being evaluated by various other departments throughout the company. Some departments have gone further. For example, the Claims Department has begun scanning its claim files and plan to complete the task by the year end.

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**Clelia Rossi, risk and compliance manager, Euro Insurances**

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## Customer & Solution Overview

### Organisation profile

Based in Leopardstown, Co Dublin, Euro Insurances is a motor insurance subsidiary of LeasePlan Corporation, the international fleet management specialist, headquartered in the Netherlands. It has revenues of €200m annually and 32 employees.

### Industry sector

Insurance

### Business situation

Staff were spending a growing amount of time handling, organising and managing paper and this was diverting them from more useful tasks. The company was also putting a business continuity strategy in place and needed to store key documents offsite.

### Solution

DMG provides a one-stop-shop of document management service covering file storage and retrieval, scanning and shredding – all done in an offsite location but in a way that gives Euro Insurances full visibility of and access to documentation.

### Benefits

- Delivers substantial cost savings in terms of employees' time
- Boosts business efficiency – staff have more time to focus on core activities
- Improves process management e.g. around data protection and security
- Frees up office space
- Provides peace of mind that comes from working with industry expert
- Sets template for future development via a partnership approach

