

Case Study: C.I. Financial uses eXadox to leap from their paper filing system to a new digital document filing system



eXadox™

“Over the years we developed a very sophisticated and effective paper filing system. We are very pleased that we were able to replicate our filing structure using eXadox and now we can pursue our strategic plans to go paperless.”

Jean-Marc L'Abbé, President, CI Financial



Summary

Company: CI Financial
Located: Sherwood Park, Alberta, Canada
Web Site: www.cifinancial.com
Industry: Investment/Insurance services
Implementation: MultiCIM, CI Financial staff

Challenges

- Precise modeling of their paper filing system by the prospective digital filing system.
- Integration with portable, desktop and departmental scanners to name and store the digital image pdf files.
- Semi-automate the file naming and filing process for optimum efficiency and accuracy.
- Facilitate the precise search and easy identification /retrieval of digital documents.
- Finding a low risk and affordable software solution that does not require huge IT resources to setup.

Solution and services

- eXadox DT Advanced edition for management staff to create profiles.
- eXadox DT Standard for staff using scanners.
- eXadox DT Basic for executives just requiring Search.
- Initial installation, personalization and training by MultiCIM and subsequent efforts by CI Financial staff.

Highlights

- Pilot project deployed for several months to study electronic filing and to evaluate eXadox functionality.
- Upgrade of eXadox DT Advanced to handle very sophisticated model of existing paper filing system.
- CI Financial builds an amalgamated eXadox Profile template to support both Financial and Insurance filing.
- MultiCIM deployed the pilot project. CI Financial executed all the refinements and deployed the production system with direct hands-on support from of MultiCIM staff.

Benefits

- Gradual elimination of manual-intensive paper filing.
- A faster and precise method to file, search, identify and retrieve critical financial and insurance documents.
- Disaster recovery through off-site backups.
- Ability to work and retrieve client files remotely.
- Easier to conform to compliancy regulations.

The investment and insurance business is very document-intensive and is still heavily paper-based. In order for companies such as CI Financial to serve their clients well and survive the enormous paper burden, they devise filing schemes that complement the way they work. As president and senior advisor of CI Financial, Jean-Marc L'Abbé used his over 20 years of experience in the industry to create a filing system that was rather unique. He took advantage of color coding and also managed to devise a method of using his filing system for tracking customer activities and managing office workflow. Although their filing system was well-designed and was the life-blood that enabled the organization to thrive, he came to the realization that best practices require paperless office initiatives. The question was how to get started?

After doing some research he discovered that eXadox was a paperless solution used by other organizations in his type of industry. However, he was not able to find any references that had a filing system that was like his. Could eXadox do the job?

He put his IT savvy son, Jean-Philippe L'Abbé, in charge of a pilot project to help evaluate the eXadox file management system in context to their operation. The pilot included one eXadox DT Standard edition and one Fujitsu ScanSnap scanner. MultiCIM, the eXadox software developer, was responsible for setup and training. Although the pilot project was going reasonably well, they decided that they would not use it in production unless they can comfortably replicate their current manual filing system and operation using eXadox. For this reason they decided that they needed the flexibility of the Advanced edition.

Jean-Philippe was not formally trained with the Advanced edition but with some minor orientation by MultiCIM and by referring to the documentation he managed to personalize eXadox and model their existing filing system. Of course, they had to change their process because they would immediately have to scan their paper documents upon arrival, index the resulting PDF image files and store them using the eXadox semi-automated file naming and storage feature. After several weeks of testing they purchased more licences and scanners and they were ready to take the leap into the digital document filing world. It took vision and leadership but today they are now realizing the many benefits.

“The reason we love eXadox so much is that it allows us to do to exactly what we want, when we want, in a matter of seconds. And to top it off, using eXadox is a breeze.”

Jean-Philippe L'Abbé, manager, CI Financial

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