

## CASE STUDY

# A New Zealand Insurance Services Provider

## Modernizing insurance services with improved data access

When a major New Zealand-based insurance provider was having issues accessing important client files, they turned to Rocket® Software to modernize their document management system.

### Challenge

Insurance providers have the important task of protecting customers in case of an accident, whether that's an issue with their property, or if their health is impacted. This means that customers need quick and flexible access to their policy documents. This New Zealand insurance company needed to modernize their existing IT infrastructure to support growing accessibility demands. With customer documents stored across different systems and files, the provider needed to streamline their document management process to store customer policy information in a central location. This would enable the insurance provider to easily print documents at any time. To provide the best service for their customers, they also needed to build a mobile application to increase their customers' ability to access personal information and important documents.

### Results

The provider selected Rocket® Folders to help manage their growing data management demands. Rocket Folders is a software platform that centralizes large volumes of data to streamline access and provide readability on any platform. Since Folders works with any format or source, there was no need for the insurance provider to recreate documents, as the past ten years of information could be transferred and archived onto the system. By modernizing their document management system, the insurance company could provide efficient online access to both clients and employees. Now, there are over 3 million policy documents stored on Folders, accounting for approximately 55 million pages.

The Rocket Folders API also enables document access through a highly secure mobile app. With around 8,000 users, clients can now easily access their policy information, no matter where they are. The switch to Rocket Folders reduced calls to the help desk by 32 percent, as clients were able to address queries themselves.

// Rocket Folders provides highly secure, centralized storage for all of the insurance provider's policy documents and client information. It also gives clients the ability to access their documents through a mobile app. With a 32 percent reduction in call volumes to the help desk, the company has been able to improve customer satisfaction significantly with Rocket. //

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