



## The J Ward Group Customer Success Story-Insurance

The J Ward group is an authorized insurance agent located in Hendersonville, North Carolina. Their business serves the Asheville-Hendersonville, Charlotte, Greensboro, and Raleigh-Durham area markets, plus all North Carolina counties. They are currently authorized to sell health, disability, accident, and life insurance products from Blue Cross and Blue Shield of North Carolina. One of the main goals of the J Ward group is to provide affordable insurance options to groups, individuals, families, and Medicare beneficiaries. They take pride in having the experience, information, and tools necessary to help its customers make well informed decisions about their health care plans.

They have recently relocated their office to meet the growing demands and expansion of their business. The relocation is expected to further provide customers with excellent service and free parking!

**“We have saved more space than anything. We had over 16 filing cabinets full of files. It also helps with scanning to email, and filing. When we want to retrieve archived policies, we don’t have to go to a physical filing cabinet.”**

Wanda Aiken  
Office Manager  
The J Ward Group

Like other insurance agencies, the J Ward Group handles quotes, policies, correspondence, and billing on a regular basis. The paperwork associated with such business processes can be extensive. Therefore, it is important for them to maintain a system of organization for their documents. Like many other companies, their paperwork storage consisted of filing cabinets filled with files and paper. “We had two separate sets of file cabinets to hold our archived and current files...We had so much paperwork that we needed to eliminate files cabinets, states Wanda Aiken, office manager for the J Ward Group.

The staff at the J ward group began noticing just how much time and space their paper files were actually taking up. This is when they began looking at alternate systems of file organization. They tried out Doc Star, as well as several other content management systems before deciding to entrust in Questys Solutions for their document management needs.

Currently, The J Ward group uses Questys Pro, which delivers an advanced out-of-the-box solution that includes all of the tools a business needs to digitally manage their documents. Some of the standard features used include: OCR for full text searching, Microsoft Office integration, the ability to store files in their native format, e-mail integration, database lookup capabilities, revision control, activity logs, and Tiff printer functionality.

Since the implementation of Questys, the J Ward Group has seen improvement in the way in which their office space is used. They no longer utilize two separate sets of filing cabinets to house their documents. “We have so far saved more space than anything. We had over 16 file cabinets full of files,” explains Aiken. They have also seen an increase in employee productivity and efficiency levels, as the time it takes to search for documents as been reduced to seconds. Employees are no longer spending valuable time searching through filing cabinets.

Wanda Aiken details some additional benefits the J Ward group as seen “Communication has improved substantially as a result of electronic file sharing...it makes our job much easier. We have recommended it to other organizations and showed them the advantages to having Questys.”

### Overview:

#### COMPANY

The J Ward Group

#### HEADQUARTERS

Hendersonville, NC

#### INDUSTRY

Insurance

#### NO. OF EMPLOYEES

3

#### BUSINESS CHALLENGE

- Growing insurance agency faced with the challenge of reducing the physical space their files took up.

#### SOLUTION

- Questys Pro: allows users to easily scan, organize, protect, and instantly retrieve information electronically. It is a fast, affordable solution built for paper-intensive businesses.

#### RESULTS

- Searchable database has resulted in a faster retrieval of documents. This has resulted in an increase in employee productivity and efficiency levels.
- Communication has improved as a result of electronic filing sharing.
- Reduced physical storage requirements. Two separate sets of filing cabinets are no longer needed.

