



NUANCE

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CASE STUDY

INSURANCE INDUSTRY

Sitzmann Morris & Lavis

CHALLENGE

- Needed to move paper among three remote offices in a timely manner
- Poor quality, unreliable fax machines being used to transmit multi-page documents
- Needed a cost effective alternative to overnight document delivery

STRATEGY

- Installed eCopy on their existing digital copiers in multiple locations
- Integrated paper documents directly into their document workflows
- Converted documents into electronic files that they can e-mail instantaneously

RESULTS

- All but eliminated all overnight delivery packages
- Now able to e-mail multi-page PDF files between offices or post them on the company network for easy downloading
- Redirect larger print jobs to the eCopy-enabled digital copiers

ABOUT SITZMANN MORRIS & LAVIS

Sitzmann Morris & Lavis (SML) is an independent insurance advisory firm headquartered in Oakland, California. An established leader in the employee benefit, life insurance, estate planning, and business continuity fields, SML prides itself on its technical proficiency, access to proprietary insurance products and sophisticated administrative services, virtually unmatched nationwide. Gary Sitzmann first entered the insurance industry in 1965 with Phoenix Mutual Life and later founded Sitzmann Morris & Lavis in 1979. The company has offices in Oakland, Santa Rosa, and Clayton, California.

“eCopy is a great system for a business like ours where time is very important.”

— **Charlene Pantaleon**
Claims Service Representative
Sitzmann Morris & Lavis

INSURANCE BUSINESS IS NOT ONLY PAPER INTENSIVE...

but highly competitive, and many of its business communications are extremely time sensitive. As SML grew, the company found it increasingly difficult to move vast amounts of paper among its three offices in a timely manner. Costly overnight services, fax machines that jammed, and poor fax quality were just a few of the issues SML was facing. According to Charlene Pantaleon, Claims Service Representative for SML, “We deal with a lot of internal business documents, including life insurance benefit information, basic enrollment forms, rate sheets, and more. Oftentimes we were faced with the need to fax as many as 60 pages of documents at a time from one office to the other.” Pantaleon reports SML had also used its fax machine to generate PDFs, which could then be stored on the firm’s network for downloading by designated recipients. She adds, “With as many as 60 pages being processed at once, we also had to deal with the inconvenience and delays caused by the fax machine jamming.”

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AS PART OF THE SELECTION PROCESS FOR ACQUIRING A DIGITAL COPIER...

SML's Director of Human Resources, Christy Akol, heard about eCopy and believed it might streamline some of SML's more critical documentbased business processes. Christy was so impressed with the simplicity and performance of the eCopy ScanStation, that she immediately proceeded with the purchasing process.

"With eCopy, we can send our time sensitive documents in moments instead of fighting with the fax machine or using expensive overnight services. We have virtually stopped using overnight services, saving hundreds of dollars."

— **Charlene Pantaleon**

*Claims Service Representative
Sitzmann Morris & Lavis*

An unexpected benefit SML gained from the eCopy implementation was the ability for users to easily redirect larger print jobs to the eCopy-enabled digital copier when in the past they would have utilized slower, more expensive local desktop printers. The ease of using eCopy Desktop to access the digital copier has resulted in improved productivity and reduced costs across the board.

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THE PRIMARY BENEFIT TO SML WAS IMPROVED COMMUNICATIONS...

SML is now able to e-mail multipage PDF files between offices or post them on the company network for easy downloading. Pantaleon reports that their Group and Life Departments uses the eCopy ScanStation to send vital information to staff, including financial reports, policies and procedures and other financial communications. "SML account teams are pleased with the improved quality and ease of use," she says. "In fact, almost everyone at SML uses the system and it is so intuitive that it requires virtually no training."