

How Rebecca At New York Life Eliminated The Need to Carry Files

Rebecca is a leading insurance agent at New York Life. Underneath her leadership are many agents in different verticals. Agents at Rebecca's agency often meet with businesses to determine the best insurance package for their needs, and provide plans that are in-line with the numerous rules and regulations around insurance.



The Challenge

Agents at Rebecca's agency processed an average of 50 to 100 enrollment or termination forms each day and were drowning in paperwork. On top of that, many agents were constantly on the go, meeting with current and future clients, and needed quick access to important client documents.

In short, Rebecca at New York Life sought a solution that provided document storage with recall functionality for a wide range of use cases and document types. The solution also needed to be HIPAA compliant and hyper-secure, yet provide quick access to documents on the go.



The Solution: A Secure, Mobile-enabled Document Management Solution

Rebecca's agents implemented eFileCabinet's intuitive and advanced cloud-based solution and found not only superior organization, but also easy accessibility and the ability to search for clients by name and instantly locate their documents through a mobile app.

Agents now enjoy the security of a password-protected solution and love the ability to automatically sort scanned or digital documents using custom or pre-determined templates. Workflows have been enhanced, and bottlenecks in approval processes have been opened up.



Results

"Everybody should be using eFileCabinet," says Rebecca. It's hard to count all the benefits she's seen using eFileCabinet, but here are just a few:

eFileCabinet enhances mobility:

"Before eFileCabinet, I literally bought a new car because I had so many files I was carrying around. I'm on the road and I needed them with me. Now, through eFileCabinet's mobile app, I can be wherever I need to be and I can look and see whatever I need. eFileCabinet completely eliminates the need to carry files."

eFileCabinet saves money:

"It's amazing, and it's affordable. The cost is nothing compared to the savings."

eFileCabinet frees up space:

"One agent cleared out two entire rooms of filing cabinets."

eFileCabinet makes updating files a breeze:

"The ability to append or prepend a file is a game changer, especially in the insurance world. eFileCabinet allows you to keep a running record of a client's life events all in one tidy file."

Want to see how eFileCabinet can revolutionize your daily work?

Start a Free Trial Now or Give Us a Call at 877-574-5505