

How Ryan at New York Life Is Saving \$35,000 a Year

Ryan is a leading insurance agent at New York Life with agents in many different verticals under his leadership. Agents at Ryan'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 in Ryan's office were using paper and filing cabinets. Managing insurance documents and remaining compliant with SEC and other government regulations was a constant battle. Needless to say, agents were overwhelmed with complex filing systems and offices were filled to the brim with bulky filing cabinets.

Ryan sought a secure solution that would provide a way to store documents in an organized and compact manner. He also needed the functionality to easily comply with varying filing regulations across numerous insurance verticals. In addition, the solution would need to offer quick accessibility to all documents, and also provide Ryan and his agents the ability to integrate their current documents into the system.



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

Ryan and his 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. They also found that scanning and filing their former documents was quick and intuitive.

Agents now enjoy the security of a password-protected solution and a secure file exchange portal, and love the ability to automatically file scanned or digital documents using custom or pre-determined templates. eFileCabinet's other features have also resulted in enhanced workflows and opened up bottlenecks in internal approval processes.



Results

"Everybody says their solutions are easy to use," states Ryan, "But it's another thing to deliver on that promise; and that's exactly what eFileCabinet did." Here's what else Ryan had to say:

eFileCabinet is easy to implement:

"Even though it's cumbersome to copy everything and paper file it, that's what we knew and it's what we knew worked. The fear was that it would take us forever to integrate our current files into eFileCabinet. That simply wasn't the case."

eFileCabinet offers constant accessibility:

"eFileCabinet is never down. I can get access to my files anywhere at any time."

eFileCabinet saves thousands of dollars:

"Spending three hundred dollars a year on eFileCabinet saves us about thirty-five thousand a year. Without eFileCabinet, we would have to hire another person to handle filing."

Want to see how eFileCabinet can revolutionize your daily work?

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