



**Merging Firms:
When Paper Meets Paperless
McKinneyOlson Insurance**



The combined resources of three Sioux Falls , South Dakota insurance agency formed McKinneyOlson Insurance and successfully merged a paperless operation with paper- only operations.

In January of 2009, the principals of the combined McKinney Allen and Associates of Sioux Falls, South Dakota and Brandon Valley Insurance of Brandon, South Dakota merged with the commercial and personal insurance components of The Olson

Group of Sioux Falls South Dakota to form McKinneyOlson Insurance.

Over the years, The Olson Group side of the merger had transformed their operation from a paper document operation to a nearly paperless docu-

ment management system. "When we first started imaging, we were one of the first agencies to do so, and I think a lot of people thought we were crazy because of the sheer volume," said Amy Olson-Miller, President of McKinneyOlson and formerly of the Olson Group.

The Olson Group recently upgraded their entire operation to a FileDirector Document Management System. FileDirector can manage millions of documents being accessed by thousands concurrent users. One of the major benefits that FileDirector offers is the opportunity of growth to accommodate the merging firms. However, McKinneyOlson's document management challenge was not so much growth as it was merging cultures. At the time of the merger, McKinney Allen was an "all paper document" operation. "We had a lot of people that have done the same thing the same way for many, many years, and so we knew that would be a challenge," said Steve Tripp, formerly of McKinney Allen and now Vice President of McKinneyOlson.

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Active Data Systems (ADS) is a Sioux Falls, SD based corporation that provides document imaging solutions for government and businesses in a six state area. ADS has been delivering and supporting document imaging consultation, products and services since 1982.



Find out more at www.activedatasystems.com

Tripp pointed out that McKinney Allen didn't just bring people to the merger but tens of thousands of documents. "We probably have 15 pallets of old (McKinney Allen) documents stored off-site. I can tell you if we ever have to obtain a document from one of those 15 pallets, good luck!"



**Amy Olson-Miller,
President
McKinneyOlson**

FileDirector, with its ease of use, scalability, and advanced components, has helped McKinneyOlson through the merger transition. Said Olson-Miller, "For some of the people who have been using just paper documents, there's always some nervousness switching to the electronic ones, but after a few days of getting into the system, they saw how easy it is to retrieve the documents and print them out. That seemed to put everybody's mind at ease and got them excited about digital management of documents."

Capturing information is easy in FileDirector. With support for thousands of scanning and digital input devices and with predefined



**Steve Tripp,
Vice President
McKinneyOlson**

Scan Profiles, scanning has never been simpler.

The former McKinney Allen documents are now being scanned and indexed into the FileDirector system. "Our front-end associate is in the process of physically imaging all of the old McKinney Allen files. She's going from 'A' to the end of the alphabet," said

Tripp. Added Olson-Miller, "If you walk around our office now, you'll still see a few file cabinets, but there's half as many as there were six months ago, and by the end of the year, we'll have none."

FileDirector's MS Office Integration takes just a click of the mouse to capture documents, spreadsheets, and e-mail messages.



Christin Bartels scans and indexes documents into McKinneyOlson FileDirector system. Within six months McKinneyOlson will eliminate the need for any filing cabinets.

While it's been easy for McKinneyOlson to see the time-saving and space-saving benefits, providing an efficient process for servicing customers has been the area in which FileDirector has shown its value. Says Tripp, "With the FileDirector system, I'm able to have a customer on the phone and answer nearly any question without saying, 'I'll get back to you,' while I put them on hold to go grab a file. Can we calculate the efficiency that creates? Perhaps, but from our client's perspective, that's true customer service."

FileDirector supports over 200 different file formats, and storage is not a problem. Says Olson-Miller, "From all indications, we can't possibly fill up the memory in our system. If we ever have a question about whether or not we should save a document, we always do, since storage and memory is not an issue."

Active Data Systems not only services clients in a six-state area surrounding South Dakota but is the United States distributor of FileDirector Document Management Systems. "We have found their service to be outstanding, but with FileDirector, we have very few issues of functionality," said Olson-Miller.



FileDirector® solutions can manage millions of documents being accessed by thousands of users wherever they need access.

FileDirector® makes storing, classification and the retrieval and distribution of documents quick and efficient.

FileDirector® is based on a modular system, which allows a company to effectively tailor their own solution, and as the com-



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