

# Success Story



**Client:** Professional Concepts Insurance Agency

**Industry:** Insurance Agency

#### Client Profile

Founded: 1988

Employees: 16

Offices: Brighton, MI and Chicago, IL

Specialties: Professional Liability, Business, Benefits & Personal Lines Insurance

#### Business Challenges

Professional Concepts first purchased the Accuralmage™ document management solution from Lumtron Technologies in 2006. In 2009, the agency upgraded their agency management system with the vendor's assurances that the new, embedded document management functionality of the system would free them from the need for a 3rd party document management solution.

In the agency's opinion, though, this was not the case. The staff felt the workflows were too rigid, and did not allow for adequate customization to the agency's unique needs. They felt that the filing and retrieval of documents was extremely slow and inefficient, searching for documents involved much more time and effort, and the vendor's answers usually required complicated workarounds or additional costs for additional functionality. As a result, the staff reverted to depending on paper files.

#### Solution

In March, 2010, Professional Concepts returned to the Accuralmage™ document management solution after 3 months of trying to use the management system's native document management features.

#### Benefits

Far simpler scanning process; documents are once again immediately accessible; much simpler workflows; greater software flexibility; increased employee morale.



## The Grass Is Not Always Greener On The Other Side

Midwest insurance agency returns to Accuralmage™ after trying a different solution

*"Free is NOT always better."*

Kim Fricke-Young, CEO  
Professional Concepts Insurance Agency



## Overview

Professional Concepts Insurance Agency, Inc. was formed in 1988 by three principals. Current CEO/COO Kim Fricke-Young was one of the founding principals of this multi-line insurance agency. From its humble beginnings without any clients or staff, PCIA now employs a home office staff of 16 based in Brighton, MI.



**Kim Fricke-Young**

Thanks to her extensive experience and commitment to serving professional service firms, agency CEO Kim Fricke-Young became the first non-architect ever named to the Michigan AIA (American Institute of Architects) board.

Professional Concepts Insurance now utilizes the AMS360 system from Vertafore, Inc. as its primary client and policy administration system – recently upgrading from the AMS for Windows® (AfW) system.

## The Initial Challenges

By 2006, Professional Concepts had outgrown the office space that it had been occupying for almost 20 years. It was time to build their own building, which they did, **without a file room.**

In addition to realizing that hundreds of square feet of valuable real estate were being wasted on file cabinets, the agency knew that they had a more serious problem: there was no consistency in how documents were being stored. Some documents were in electronic form and some were in paper form. Locating documents was becoming increasingly more difficult and time consuming.

***Hundreds of square feet of valuable real estate were being wasted on file cabinets***

## The Search Process

Because of the agency's heavy reliance on its AfW system for all day-to-day client and policy administration activities, a seamless integration between the two products was the number one requirement. Employee workflows and storage methodologies must be consistent, documents must be easily filed and retrieved, and the document management system (DMS) must be easily customizable to accommodate the agency's desired processes - which differed from department to department.



**Leah Fritch**

Leah Fritch, the agency's I.T. Manager, took charge of the search and formed a committee to thoroughly research all of the vendors. In addition to the Accuralmage™ solution from Lumtron Technologies, the agency reviewed the docSTAR™ and etfile™ systems as well.

***“Accuralmage™ was clearly the best system for our needs.”***

## The Decision

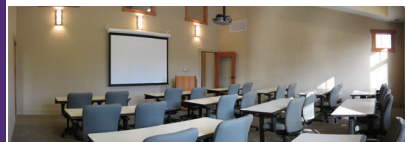
Agency President Mike Cosgrove explains, “When the review process was over, the decision was extremely easy. Accuralmage™ was clearly the best system for our needs.” He continues, “Besides being impressed with the ease of use and the reliability of the system, we knew that Lumtron was the right company for us. They answered all of our questions in layman's terms and made us feel the most comfortable.”



**Mike Cosgrove**

## The Implementation

“The implementation process was great,” Fricke-Young comments. “Lumtron took the time to understand the way **we** did business, and then customized the software to work within our existing processes.”



**Professional Concepts' Training Room**

She continues, “The training went smoothly. Lumtron made sure that everyone had a complete understanding of the software, and that all questions were answered. The classroom training was great, but the one-on-one training – where the staff can ask the questions they didn't want to ask in front of everyone else – that's where the real value is.”

The next 3 years went very smoothly. Professional Concepts' staff efficiency had increased dramatically, their workflows were consistent, and everyone was happy with the Accuralmage™ solution.

***“We felt our management system vendor over-promised on the scanning features of their product.”***

### **The Later Challenges**

In 2009, Professional Concepts’ agency management system vendor approached the agency with an offer to upgrade them to a new management system – the “successor” to their existing product.

“We were resistant at first, because we were comfortable with our systems as they were,” Fricke-Young explains. “Then the sales representative told us how the new management system included a document management module at no extra charge.” She continues, “Even though we were very happy with Lumtron’s Accuralmage™ system, it did require ongoing annual fees.” She concludes, “We were assured that we could do everything in the new management system that we were doing with Accuralmage™ – just without the ongoing costs.”

Based on these assurances – that all the agency would lose would be the annual fees that they had been paying to Lumtron – the agency made the move to the newer management system and its included document management module.



*The beautiful view from Professional Concepts’ back patio*

### **The Agency’s “Upgrade”**

“We learned one thing very quickly,” Fricke-Young comments. “Free is NOT always better. We felt our management system vendor over-promised on the scanning features of their product.”

She explains, “We found the scanning to be very inefficient and the document retrieval to be very cumbersome. We really tried to make it work, but the staff felt it was totally unusable. Our productivity dropped to pre-Accuralmage™ levels.”

Fricke-Young continues, “The new scanning workflows required more steps compared to Accuralmage™. In order to process the same volume of documents, we would have had to put a scanner on every desk and require each employee to do her own scanning. That was simply *not* an acceptable option.”

She concludes, “It got to the point where the staff just stopped scanning documents.”

### **Return to Accuralmage™**

“In March of 2010, we received a call from Lumtron,” Fricke-Young comments. When Lumtron’s Vice President Paul Fotis asked how their experience had been with their new management system and its included document management features, “I let loose with both barrels,” jokes Fricke-Young. “I felt bad because I was ranting about a product that was not his, but he took it all in.” She adds, “When he asked if I would consider returning to Lumtron and Accuralmage™, I was all ears.”

Fricke concludes, “Within a couple of weeks we had struck a deal to go back to Accuralmage™, and 30 days after that, we were back up and running. We’ve never been happier.”

When asked what her advice would be to any other agencies who might be considering a similar move, her response is concise, yet complete:

“Don’t.”

***“We learned one thing very quickly. Free is NOT always better.”***



# AccuraImage™

## Software and Services

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- *Complete Content Management & Control Solution*

### AccuraImage™ SMB

- *Document Management & Control Solution for Small- to Medium-Sized Agencies*

### Professional Services Group

- *Customized implementation strategies that adapt to the way you want to do business*
- *Expert, professional end-user training to get your agency started out on the right foot*
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## About Lumtron Technologies

Lumtron Technologies is the insurance industry's premier provider of secure document management and Business Process Management (BPM) solutions. Established in 1984, we have a 25+ year track record of providing superior technology solutions with incomparable implementation strategies.

For more information, please contact us at (815) 788-0088 or email us at [SalesAdmin@Lumtron.com](mailto:SalesAdmin@Lumtron.com).

# Lumtron

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