



PROCESS DRIVEN SOLUTIONS

CASE STUDY

Leading Insurance Investigation Company uses ***i-Sight Investigation Software*** to Streamline Case Management, Increase Client Satisfaction and Repeat Business

“With i-Sight, we are more efficient and get results to clients more quickly, giving us an advantage over the competition. i-Sight will be a revenue generator as our service quality goes up, resulting in more business from existing clients.”

— Will Gregory, President,
Advantage Surveillance

Customer name: Advantage Surveillance, Inc.

Challenge:

- With five offices, Advantage Surveillance needed to centralize case information, eliminate duplicate manual entry and streamline report creation.

Solution:

- i-Sight Investigation Software serves as a single location for case information for investigations, managers and clients.
- Investigators in the field enter information once, and it is available to all parties involved in a case.
- At the push of a button, managers create reports customized for each client.

Results:

- Managers free at least 15-20 percent of their time by not having to create reports manually, so each manager handles more cases.
- The company delivers evidence and results to clients more quickly.
- More efficient case management lowers costs.
- More responsive, quality service increases repeat business and revenue.

To protect against fraud, insurance companies rely on evidence to support claims. A number of regional and national insurers in the Southeast turn to Thomasville, N.C.-based Advantage Surveillance, Inc. to gather the essential documentation to verify the legitimacy of their claims.

Advantage Surveillance offers a range of services exclusively to the insurance industry, helping them gather the necessary documentation for their cases. The company provides background checks, activities checks and onsite investigations with experienced investigators and state-of-the-art video surveillance equipment and vehicles. With five offices, it serves North and South Carolina, Virginia, West Virginia, Maryland, Louisiana, Mississippi, Georgia, Kentucky, Tennessee, Alabama and Florida.

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THE CHALLENGE

Since Advantage Surveillance opened in 1998, it has grown from one office to five. As operations became more distributed, Will Gregory, President, sought a way to centralize information capture and access. When it comes to field surveillance, he believes strongly in investing in technology to drive better results.

"We put our focus and our investment in investigators in the field, in giving them the appropriate equipment to make sure we get results at every opportunity," Gregory said. "We have surveillance vans made specifically for the insurance industry, so we have more opportunity to be in the right place at the right time and obtain the results and evidence clients need. That's our main focus."

Over the years, the company has tried various solutions for managing client data, evidence and reporting, including creating its own program in house. However, those systems lacked the complete functionality to reduce duplicate manual data entry and report generation. As investigators brought information back from the field, managers spent up to an hour-and-a-half a day creating reports for clients.

"Our insurance clients need information quickly, so we had to have a system to communicate with investigators in the field and with clients on a more efficient basis," Gregory said.

THE SOLUTION

Advantage Surveillance found i-Sight Investigation Software from Customer Expressions. The web-based case management software provides a centralized, workflow-driven solution for managing investigations. All users can access i-Sight 24/7, enabling managers and investigators to collaborate in real time.

"We are excited to have found i-Sight," Gregory said. "With i-Sight, we are decentralized but manage all information and evidence in a centralized system. It maximizes our efficiency so we enter information one time and it's immediately accessible for anyone who needs it."

With i-Sight, investigators input case data in their laptops from their surveillance positions. They can store everything related to the case in one location – video, photos and accompanying documentation. The next time they connect to the Internet investigators can "Synch" their data to the main server, making that information readily available to others on a project.

Previously, investigators formatted case information in six or seven different templates to meet various clients' requirements. Now, they simply enter the data and it automatically flows into customized i-Sight templates based on the client. Without the need to worry about formatting, investigators can focus on cases.

As the database of information grows, investigators will also benefit from previous case file information, such as photos of subjects or directions to locations. "We'll have better results when investigators have immediate access to everything they need for the investigation right in front of them," Gregory said.

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Reports at the Touch of a Button

Seven managers oversee about 45 investigators in the field. Each manager typically handles from 6-10 investigators and prepares reports for multiple cases and clients. At any time, managers access i-Sight for full case information.

With all case data already in the software, managers can create and send client reports at the click of a button – eliminating the previous one-and-a-half hour daily report-creation process. Moreover, all reports are delivered to clients faster and in the format they desire.

When investigators wrap up a case, managers can create reports for clients summarizing all findings to support trials or hearings. Before, they had to compile a collection of all the various reports manually.

Working with Customer Expressions, Advantage Surveillance has tailored the system to its specific needs. The company also looks forward to using the software to track project costs. At the start, they will indicate the amount allocated for a specific project, and then manage expenses against those budgets. Additionally, the company will extend password-protected access to clients to review current evidence and even budgets for decision support – a step that Gregory anticipates will significantly add to client satisfaction.

THE RESULTS

Gregory expects to realize considerable time-savings by centralizing case information in one location. Investigators enter data as it is collected and no longer need to input it back at the office at the end of the day. Managers eliminate cumbersome report creation, allowing them to devote at least 15-20 percent of their days previously spent on reporting to case management. Because managers can oversee more investigators, Gregory also expects to reduce staffing costs.

But the real payoff comes in the additional business the company will generate by delivering higher quality service and better results for clients.

“The easier we can make things on our clients and the more results we provide for them, the more business we will get. With i-Sight, we are more efficient and get results to clients more quickly, giving us an advantage over the competition. i-Sight will be a revenue generator as our service quality goes up, resulting in more business from clients.”