

# JP Colonna implements paperless customer records management process with everteam.case



Customer  
Industry  
Product  
Application

**JP Colonna**  
**Insurance**  
**everteam.case**  
**Paperless Customer Records Management**

Experiencing very strong growth in activity linked to the signing of a major new contract in the hospitality industry, JP Colonna optimized customer files critical to the health and welfare of its management entities.

By replacing a 100% paper system with a 100% electronic system throughout the organization, JP Colonna experienced noticeable productivity gains, thus allowing teams to absorb ever-increasing workflows and increasing efficiencies.

**everteam**

[www.everteam.com](http://www.everteam.com)

+33 (0)1 72 71 33 33 | 336, rue Saint-Honoré, 75001 Paris – France

# About JP Colonna

JP Colonna SAS, doing business as CGAM, provides consulting and management in life insurance serving companies, their employees and professional divisions. CGAM conducts business in France.

Founded in 1972, is privately held and based in Paris.



## Everteam Solution

With EverSuite Case Management, JP Colonna has a complete solution for EDM/workflow.

The solution automatically integrates all the document flows constituent of the subscribers folder:

- Incoming mail, daily scanned with Seres tool DOCUPOST,
- Mails generated by the business application on AS/400,
- Outgoing documents, directly deposited from Office
- Emails

Managers now have a comprehensive electronic customer folder accessible via a simple browser in EverSuite.

*“EverSuite Case Management gradually becomes a central brick of our information system. Its deployment enables us to enhance the traceability of our management actions to better manage our production and especially to better serve our customers.”*

**Naquin Mathieu** | Director of the Management Centre, JP Colonna

## Everteam Impact: Benefits for the 180 Managers

With EverSuite Case Management, JP Colonna now has a complete solution for EDM/workflow. Managers now have a comprehensive electronic customer folder accessible via a simple browser in EverSuite.

The EverSuite workflow complements the device to automate the flow and processing to customer requests related documents. Depending on their type (optical care, death, hospitalization, disability, daily indemnity) documents are dispatched in the authorized managers treatment baskets of each service.

In 2013, nearly 150,000 folds were treated in a paperless way by JP Colonna.

Finally, integration with the business application on AS/400 also controls customer information (name, social security no, beneficiaries, and so on) directly from EverSuite thus avoiding errors related to manual processing by managers.





# everteam

## About Everteam

Everteam brings over 25 years' experience and innovation to the field of Enterprise Content Management. In an ever-increasing legal and compliance environment, Everteam's range of products support the improvement of content-driven processes, and enable enterprise customers to easily monitor and align their content strategies for overall organizational efficiency and effectiveness.

[www.everteam.com](http://www.everteam.com)  
[info@everteam.com](mailto:info@everteam.com)

+33 (0)1 72 71 33 3  
336, rue Saint-Honoré,  
75001 Paris – France

+1 (650) 596-1800 (voice) / +1 (650) 249-0439 (fax)  
28 State Street Boston,  
MA 02109, United States