



CAPTARIS CUSTOMER CASE STUDY



CUSTOMER PROFILE

- INDUSTRY** Insurance
- EMPLOYEES** 10
- LOCATIONS** Parsippany, N.J.
- WEB SITE** www.titleesq.com
- COMPANY** Started in 1994

SOLUTION SNAPSHOT

- CHALLENGE** Customer service and productivity affected by delays since employees had to pull files from basement storage
- SOLUTION** Captaris Alchemy
- INTEGRATION** Canon scanners, customized AIM for Windows title insurance production software
- RESULTS** Employees retrieve files at the desktop and deliver documents while customers are on the phone; saves thousands of dollars in added expense for office space rental and salary overhead

Esquire Title Escapes Dusty Basement Storage with Captaris® Alchemy®

Delivers Files to Customers Immediately for Improved Service and Increased Productivity that Provides a Competitive Edge and Cost Savings

Esquire Title Services, LLC, provides a full complement of real estate assistance to attorneys, brokers, lenders, buyers and their representatives. It is an agent of the nationally respected Stewart Title Guaranty Company and the First American Title Insurance Company, among others.

The Challenge

When Alfred D. Santoro, Jr., Esq. and his wife Elissa Buonarota, Esq. purchased Esquire Title in 1997 they inherited a basement full of file boxes. "We had almost 5,000 files down there," said Alfred Santoro, co-president of Esquire Title. "The documents were subject to damage by water, deterioration from age, dust, even rodents running around." To fulfill customer requests, employees had to walk down the stairs several times a day to shuffle through 30-pound boxes. "Hopefully, the file was there," Santoro said. "Paper and work interruptions left more chance for error and misfiling." Even when files were found, turnaround to return calls took at least a day. "Delays were not great for customer service," Santoro said. "The situation was really a nightmare and had to be cleaned up just to get on with our business plan."

Challenges related to document storage and retrieval were not new to Santoro, who also serves as Technology Chair for the American Land Title Association. Having worked in the title business for more than 25 years, he has solved problems with other professionals and seen technologies come and go. He recalled a meeting in 1995 focused on paper archival options. "One participant said he didn't want to spend money to store hard copies of documents, because 'space in old barns is cheap and good enough!'"

Because they are required by state law to store files for at least 15 years, title companies must find an effective and reliable solution. Santoro keeps files on title searches even longer—for at least the life of the business. But to meet this goal, title companies have their work cut out for them. Some utilize off-site storage services. But it can take days to retrieve a file and the retrieval costs alone can add up to almost \$10,000 per year even for a small business like Esquire Title. On-site storage requires file clerks, space and hardware maintenance. Some businesses used microfilm archives, but repairing



the machines can become cost-prohibitive. For instance, Santoro told of a friend's office basement that was full of broken microfilm equipment. Parts from several machines were cannibalized to create one working system. The rest were useless. "We called them boat anchors," Santoro said.

The Solution

Santoro solicited recommendations from local business associates to solve Esquire Title's basement dilemma. A friend with a garage full of files said she had a solution but the scanner repeatedly jammed while Santoro observed the system. He also decided proprietary hardware and software limited his choices and offered little flexibility. One vendor proposed a system based on outdated 486 computers and a CD changer. Santoro felt there had to be a reliable and scalable off-the-shelf solution that Esquire Title could use with its existing technology. He found it through Brian Ashforth of CPT Intelligent Technologies, a New Jersey-based integrator specializing in document management. "He listened to us and understood our problems," Santoro said. "He came back in two weeks with a foolproof system that fit our requirements."

Esquire Title installed a digital storage system powered by Alchemy. "Paper files are now under control," Santoro said. The company manages title insurance production with two Canon scanners and AIM for Windows, the custom title software application from Stewart Title. Alchemy integrates with the scanners and title software so employees can now electronically file documents. Esquire Title's digital "file room" meets industry storage requirements and it allows employees to immediately access customer documents without encountering stairs, boxes and dust. Documents are indexed and searchable via five key fields: buyer, seller, file or title policy number and customer.

Esquire Title started with a stand-alone version of Alchemy and expanded to a server system with both internal and removable hard drives in 2005. "The system is simple and intuitive and it runs flawlessly," Santoro said. He estimated nearly 10,000 files have been scanned and electronically stored since 1997. He commented

that "Alchemy has had virtually no problems." Based on this reliability, Santoro plans to begin real-time scanning, capturing all documents as they arrive. Also, he intends to use Alchemy to assimilate 6,000 files from the recent acquisition of another title insurance company.

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The Results

"Our investment in Alchemy has paid off in numerous ways," Santoro noted. "The most important is the ability to improve and enhance service for our customers." Employees use Alchemy to immediately access files right at their desktops, cutting average response times by at least one business day. "Customers can't believe we are able to email them a file while we are on the phone with them," Santoro said. The turnaround even impressed business partners. "One title agent was originally against us buying a digital document management system," Santoro explained. "After seeing how our system works, the agent purchased Alchemy for its local office, choosing it over its own in-house product." Esquire Title has found providing information in a convenient format offers a competitive edge and positively affects the bottom line. "If we have fast and easy access to needed files, clients will likely come back." Also, since title charges are regulated by the state, Esquire Title cannot simply raise prices to increase profits; instead it looks to increase profit through efficiency gained from reducing labor-intensive paper processes with its investment in Alchemy.

Esquire Title also uses Alchemy to increase productivity and avoid costly alternatives. "Our

current staff can accomplish all of our scanning needs during our downtime," Santoro said. "We don't have to expand the office or hire a file clerk." As a result, Esquire Title saves thousands of dollars every year in rental fees and salary overhead. The company achieved a full payback on Alchemy "easily within three years," Santoro estimated.

When it comes to implementing new digital technologies, Santoro feels adaptable small businesses have an advantage over large corporations. "It goes back to the 'old barn' comment. A lot of people and corporations are set in their ways," Santoro said. "I now tell my friends Alchemy is the greatest thing since sliced bread. It is flexible and dependable. It simply works."

For More Information

Captaris, Inc. is a leading provider of software products that automate business processes, manage documents electronically and provide efficient information delivery. Our product suite of Captaris RightFax®, Captaris Workflow and Captaris Alchemy Document Management is distributed through a global network of leading technology partners. We have customers in financial services, healthcare, government and many other industries, and our products are installed in all of the Fortune 100 and many Global 2000 companies. Headquartered in Bellevue, Washington, Captaris was founded in 1982 and is publicly traded on the Nasdaq National Market under the symbol CAPA. For more information, visit www.Captaris.com.

CPT Intelligent Technologies, Inc. is a value added reseller, system integrator and custom imaging solutions provider located in Flemington, N.J.. It has provided solutions for business and industry since 1957. For more information, visit www.cptinfo.com.

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