

eFLO

Being paper-free means more than making fewer copies...

It means freedom!



eFLO will build the platform to enable your firm to reduce its' dependence on physical files and all the associated costs.

Gradient Solutions will work with your staff to establish **protocols** and plot the path of conventional processes to move them into a **uniform, efficient** and **streamlined** paper-free workflow environment.

Did you know?





Employees spend on average 12 minutes processing a document.

9 minutes are spent looking for the document, handling it and filing it. Only 3 minutes are spent on the actual content.

What could your employee do with that 75% time savings?

Close a deal? Advise a client? Negotiate a contract?

When the physical files in your office are replaced with a document management strategy, a modern, flexible work environment is created.

-  An environment that facilitates business development.
-  An environment where your client files can be accessed even if your office cannot. Servicing your clients and ensuring business continuity are key factors in any Disaster Recovery Program.
-  An environment where space-filling file cabinets are replaced with productive employees advising clients and generating sales opportunities!
-  An environment that can transition bulky Commercial files to move seamlessly and virtually from one 'desk' to another at the click of a button.

A good environment to work in.



GRADIENT SOLUTIONS

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NAVIGATING CLIENTS TO MEASURABLE SUCCESS

To suit your needs, eFLO is offered on three different levels:

eFLO Phase I

eFLO Phase I harnesses the power of your current Broker Management System: maximize the functionality of the system and realize efficiencies in a matter of days. **In-house process involving:**

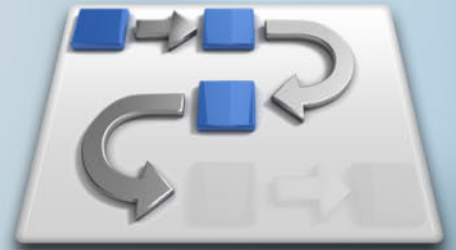
- ✓ Evaluation of Broker Management System usage
- ✓ Determination of documentation, coding and scanning standards including distribution and access
- ✓ Creation and implementation of Phase I Protocols
- ✓ Implementation and testing of the eFLO process including hands-on staff training
- ✓ Introduction of the eFLO e-manual
- ✓ Complimentary follow up program



eFLO Phase II

eFLO Phase II builds a process allowing your Broker Management System to work in tandem with a Document Management system achieving even greater flexibility and efficiency. **In-house process involving:**

- ✓ Evaluation of Broker Management System usage
- ✓ Determination of documentation, coding and scanning standards including distribution and access
- ✓ Creation and implementation of Phase II Protocols
- ✓ Introduction to the features and benefits of managing electronic documentation
- ✓ Implementation and testing of the eFLO process including hands-on staff training
- ✓ Introduction of the eFLO e-manual
- ✓ Complimentary follow up program



eFLO Phase III

eFLO Phase III enables the creation of electronic workflows to plot the virtual path of documents throughout your office. **In-house process involving:**

- ✓ Evaluation of Broker Management System usage
- ✓ Determination of documentation, coding and scanning standards including distribution and access
- ✓ Creation and implementation of Phase III Protocols
- ✓ Development of electronic workflows for basic office processes (New Business, Renewals, Endorsements)
- ✓ Introduction to the features and benefits of managing electronic documentation
- ✓ Introduction to the electronic alerts and reporting functions
- ✓ Implementation and testing of the eFLO process including hands-on training of staff and eFLO Champion
- ✓ Introduction of the eFLO e-manual
- ✓ Complimentary follow up program

