

## CASE STUDY

**FORTUNE 500 INSURANCE  
COMPANY IMPROVES  
INFORMATION  
MANAGEMENT**

Recognized by Fortune as one of the “World’s Most Admired” insurance companies, this Fortune 500 financial services company needed a software solution to meet their specific records scheduling system and offsite storage needs.

After looking for a permanent solution, not just a temporary fix, Gimmel Physical was selected to accommodate the lifecycle management of the growing volume of records as well as the classification needs of department-centric file plans.

**PROFILE****INDUSTRY**  
Insurance**PRODUCT**  
Gimmel Physical



## Gimmel Built a Centralized, Secure Platform for Complex Records Management Needs

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This well-known insurance company was facing a multitude of physical records management challenges and needed a quickly implemented solution for their needs. The challenges included record custodians from different departments keeping files for extended periods or not using the warehouse at all and instead kept various records in their departments. After a thorough search for appropriate vendors who could manage physical records according to their unique needs, Gimmel was chosen to ensure retention schedules were met and physical records were disposed of in a timely manner.

Though this company did have a corporate retention schedule, separate departments could tweak this schedule to fit their needs. With approximately 170,000 boxes, Gimmel Physical had to design a way for them to not only track boxes but to also allow individual departments control on how those boxes of records are processed.

After consulting with the client, Gimmel Physical was able to design a customized information management solution that could manage the 3,000+ department-and-document specific record schedules.

With Gimmel Physical, the client can now easily classify their records according to their established file plan, covering 11 main processes and 60 subprocesses. By translating their everyday business practices into a functional software, Gimmel Physical was able to create a solution that was more intuitive and useful for their users.



**3,000**

Records Schedules

**300**

Departments

**170,000**

Boxes Tracked



## CHALLENGE

This company needed a centralized solution to track the location and lifecycle of their growing volume of records, both on and offsite.



## SOLUTION

Gimmel Physical configured a solution to accommodate complex retention schedule and offsite storage management.



## BENEFITS

Manage 3,000+ department/  
document specific records  
schedules

Manage processes of  
300 departments

Track records from 3rd party  
offsite storage vendor

*"The client required that the operating system be an extension of their Gimmel enterprise content operating system. I'm pleased to say, through our collaborative efforts, we delivered."*



## ADDED INTEGRATION ENABLED TRANSITION TO NEW OFFSITE VENDOR

After five years, the client decided to move their records from their own onsite storage facility to third-party offsite storage facility C.H Coakley, which uses Andrews VCK-SQL as its records center software.

Understanding the need for records management continuity, Gimmel Physical built an integration with Andrews Software. By adopting a new dual barcode system, the client was able to retain their current process for tracking boxes of records at the new offsite facility without disruption. This allowed the client to manage the entire lifecycle of corporate records from the Gimmel Physical application interface, regardless of location.



**Gimmel**

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