



SOULDERS UNDERWRITING GROUP

HELPING TO PROTECT PROFESSIONALS WITH EXCESS
AND SURPLUS COVERAGE OPTIONS

Souders Underwriting Group is an independent insurance brokerage who finds ways to protect professionals when others refuse. Working with select agents and carriers, Souders places professional liability and traditional excess & surplus products in defying situations.

THE CHALLENGE

Managing paperwork and placing new business efficiently without errors.

Souders represents many agents and carriers. Submitting, sifting through, and presenting the numerous coverage options requires speed, accuracy and security. Tracking the steps and keeping up with the paperwork was daunting. Being in a specialized segment of the insurance market, traditional insurance software products were not a good fit for the way Souders needed to run the business. Souders wanted to grow, but the current way of handling the paperwork was a major holdback. Teamwork and collaboration were impossible because information resided on individual desks and there was no way to coordinate the process.

THE SOLUTION

Combine paperless document management with scheduling in a centralized cloud-based platform.

Souders knew applying the right technology could improve efficiency, reduce errors and allow team members to better assist each other. The first step was going paperless. While many aspects of the business were already using PDF documents, a document management system provides centralized access, control, and organization to all the



VERTICALS: INSURANCE & FINANCE



SERVICES: SOFTWARE & CONSULTING

THE SOLUTION (CONTINUED)

content. While researching its options, Souders read about PSIsafe document management software and saw potential. The system offered everything they immediately needed and had other features for future uses. Customizing PSIsafe to Souders specific requirements was easy. The decision to implement PSIsafe in the cloud eliminated the need for maintaining and backing up local servers. Souders also found a unique way to use the Scheduling feature in PSIsafe to collaborate efficiently across the organization.

"We really enjoy working with eBizDocs because they understand our needs and have the knowledge and skillsets to help us make the system do everything we need."

BLAKE SOUDERS

CEO
SOUDERS UNDERWRITING
GROUP

THE RESULTS

Deliver prompt service, scale the business, and be the leading brokerage for agents and carriers.

Since implementing PSIsafe, Souders is growing the business faster and larger than previously possible. Headcount, while steadily increasing, is well under control through the gains in efficiency of the PSIsafe solution and proven internal processes. Today, PSIsafe electronically manages all of Souder's customer, agent and carrier documents as well as their proprietary business processes. Looking forward, Souders will be extending its use of PSIsafe to Accounting and Human Resource functions as well as using the built-in reporting tools to analyze business trends and results.



eBizDocs

eBizDocs is an award-winning electronic content solutions provider. Services include: cloud and premise software solutions, paper and microfilm conversion, scanner sales and service, and process consultation. With a strong commitment to quality and service, eBizDocs has been a center of excellence since its inception in 1999. eBizDocs serves private and public-sector organizations and is a preferred source contractor for NYS entities. eBizDocs has numerous honors and awards, which, paired with satisfied customers, solidifies its status as a dependable leader in the content management industry.

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