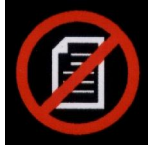


An IFA Case study: Electronic Document & Records Management Software



“Let us ensure that you are secure!”

Founded in 2000 by David Hammett, David Hammett Insurance Services (DHIS) is a family-run brokerage based in the heart of Surrey. The Principal of the business is David himself. Initially in Export, David established his first company in 1977 marketing goods and products overseas, mainly to the Middle East.

In 1985, he moved into Insurance, becoming a Life Underwriter with Imperial Life of Canada. After an immensely rewarding 5 years, David moved into a Managerial role at Allied Dunbar. In conjunction with his managerial duties, David acted as a Financial Adviser and Mortgage Broker, whilst building on his General Insurance agencies and expanding his Commercial Insurance business until 2004.

David has obtained the required regulatory exams for Financial Planning and Mortgage Advising. He is a certified member of the Personal Finance Society (PFS) and a member of the Chartered Insurance Institute (Mortgage Professional). He has been a licensed Debt Counsellor since 1989, whilst maintaining his Chartered Marketer status with the Institute of Marketing. Additionally, David is backed up by fully qualified professionals in the family.



In November 2004 David Hammett Insurance Services became directly authorised and regulated by the Financial Services Authority* and fully independent.

Says David “DHIS believes in coupling professional expertise with a friendly and personal approach, to provide a special service, identifying clients' needs and giving them advice and recommendations on the most appropriate and cost-effective products. Just as important is the continuing after- sales service aspect. DHIS aims to keep our clients. Our business thrives on the personal referrals that they pass on to us to help their family, friends and work colleagues. Our motto is **"Let us ensure that you are secure!"**”

During 2005 With continuing growth of the business DHIS invested in computers and networks to improve back-office efficiency encompassing speed of processing, extra data storage and both wired and ‘wireless hot-desking’ facilities. However, the volumes of client paper files started to become a real problem during this period. David picks up the story “with the increasing numbers of cases being handled by the business the associated paperwork was in danger of getting out of hand. We needed to look at a more efficient way of securely filing our clients' paperwork which would not only make it easy to store, but also retrieve and review with minimum fuss.”

Through contacts DHIS heard of Business-Work-Ware (BWW) and reviewed the document management filing facilities. Says David, “we found the [BWW] software flexible and met the FSA guidelines for electronic storage. The software works with our scanning equipment. We also found that members of the BWW team were prepared to work with us to tailor the system to meet our requirements and provide training and backup to enable us to commence working with the new software.” “The benefits for us of the system are space saving, better use of time with fast access to client files on-screen and follow-up of proposals using the workflow system...” “...and it will also save my back by avoiding carting hefty paper files to and from client meetings[!] More than that, the ability of BWW software to store and index e-mails will prove both time-saving and a sensible defensive business move for us to cover compliance and other issues.”

David finishes “The use of BWW software is allowing us to work on our clients’ behalf more securely and efficiently. So please **“Let us ensure that you are secure!”**”

About DHIS

Founded in 2000 by David Hammett, David Hammett Insurance Services (DHIS) is a family-run brokerage based in the heart of Surrey.

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About Business-Work-Ware Ltd

Formed in 2003 and based in offices just 20 miles south-west of London, Business-Work-Ware Limited is dedicated to the development, supply and support of secure electronic document and records management software. Business-Work-Ware Limited has a growing number of clients in the financial services industry. For more information visit www.business-work-ware.com , or call 020 8786 3676.

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