



Ambrose Employer Group Improves Client Experiences by Streamlining Document Processes with Napersoft CCM

Background:

Ambrose provides outsourced human resources, payroll and benefits administration and human resources information systems.

Goal:

Improve client experiences by providing a more efficient process for creating and distributing employee benefits packets to clients.

Solution:

Replace existing process with Napersoft CCM document automation solution.

Results:

Time savings, streamlined document processes and improved client experiences overall.

“The automatic document creation has been a huge time saver for us. This gives us even more time to focus on our core—connecting with our clients.”

-Kim Diorio, Director of Client Services, Ambrose

About Ambrose

Ambrose is a professional employer organization (PEO) that provides outsourced human resources, payroll and benefits administration and human resources information systems for white-collar organizations.

With over 800 clients, Ambrose provides quality client experiences by delivering exceptional, high-end service, professionalism and knowledge to their customers.



The Past Employee Benefits Document Process

As a component of their business, Ambrose provides employee benefits documents to their clients. These documents are generally 20 to 40 pages long and include an extensive amount of information including healthcare, dental and vision benefit plan comparisons as well as the enrollment processes.

Ambrose was using a less automated process to create these documents.

Kim Diorio, Director of Client Services at Ambrose, talks about the past process, “The creation of benefits documents was piecemeal and required frequent updates because Ambrose continuously enhances its platform. We needed a more efficient process.”

Contact us today for more information:

1-800-380-1000 USA
1-630-420-1515 International

Napersoft Headquarters:

Napersoft
40 Shuman Boulevard
Naperville, IL 60563 USA

www.napersoft.com

Toll free: 1-800-380-1000

Direct: 1-630-420-1515

Fax: 1-630-420-0354

Email: info@napersoft.com

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Napersoft Federal:

Direct : 1-703-962-1151

Fax : 1-703-962-1154



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The Selection Process

Ambrose serves hundreds of clients with thousands of employees. For this reason, Ambrose explored many solutions to ensure their selection would complement their business in providing the highest-quality client experience.

Ambrose chose Napersoft CCM because of its ability to generate the complex documents Ambrose needed.

“Because of the high use of merge fields and situational-based paragraphs in our documents, we found business rules to be a very important component of the solution. Other solutions couldn’t maximize this capability the way that Napersoft CCM did.”

-Kim Diorio,
Director of Client Services,
Ambrose

Diorio also found other solutions to be too labor intensive and the ease-of-use with Napersoft’s familiar Microsoft Word authoring tool to be an additional benefit.

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“By making our benefit packets available online, our clients are able to easily access the information they need whenever they need it.”

-Kim Diorio, Director of Client Services, Ambrose

The Solution

Ambrose chose Napersoft CCM to automate their benefits document creation and distribution process.

With Napersoft CCM, Ambrose streamlined their document processes resulting in substantial time savings. “The automatic document creation has been a huge time saver for us,” comments Kim Diorio, Director of Client Services.

Extending the Benefits with OnDemand

In order to extend the benefits of Napersoft CCM, Ambrose rolled out Napersoft’s OnDemand option. This option integrates with Web portals to enable customers to interactively create, view and optionally distribute documents.

When an Ambrose client hires a new employee, the employee needs a packet of orientation information. In the past, Ambrose had a less streamlined process for responding to customers’ requests for documents such as orientation packets. With Napersoft CCM, the new hire can now go to Ambrose’s web portal and input their information. Napersoft CCM automatically generates a customized orientation packet for them. “By making our benefit packets available online, our clients are able to easily access the information they need whenever they need it.”

Now, fewer resources are spent on generating documents and more resources are spent on substantive client engagement. “Our energy can now be focused even more on responding to our clients’ needs and answering new hires’ questions.”

Napersoft’s OnDemand option has also resulted in faster document turnaround times, reduced postal costs and overall an improved customer experience.