



## TAB Customer Success Story

### *Using a Move to Convert, Consolidate and Improve Access to Records Collection*

Keeping records properly stored and accessible is absolutely critical for any organization, but it is a particularly tough challenge for the information intensive insurance industry.

This was the reality for U. S. Epperson Underwriting Co. Their success meant that the company had outgrown its original file rooms and now its large records collection was housed in three separate areas on different floors. This made maintaining efficient file access and retrieval more difficult, and they needed to solve this.

What they wanted was a central location where the filing system was designed for efficiency in locating and retrieving records, and they needed the system to be able to grow with them.

An upcoming office move presented the perfect opportunity to plan and execute this centralization, and U.S. Epperson Underwriting Co. enlisted the help of TAB to get it done.

#### **Solution: Mobile and Static Storage, Side Tab Files**

TAB consultant Paul Girten worked with the CPU (Central Processing Unit) manager and the purchasing manager along with their teams to develop the right strategy for efficiency and growth.

TAB recommended the installation of three new mobile systems combined with an area of static shelving to give the centralized file room the flexibility to store the necessary range of documents and files.

Converting the company's top tab manila folders to side tab files was also suggested. This would allow them to stack files higher, freeing up floor space while making good use of vertical space.

TAB then made recommendations on how U. S. Epperson Underwriting Co. could standardize and streamline their file labeling process to further increase their production and retrieval efficiency.

#### **Move, Conversion, Consolidation!**

U.S. Epperson Underwriting Co. also used TAB's services for converting, consolidating and moving the files.

Using custom produced labels and TABQUICK labeling software, the TAB team created a database populated with all the information U. S. Epperson Underwriting Co. needed to place on its file labels.



#### *The Side Tab Advantage*

With traditional filing cabinets where labels are on top, you can only go four tiers high. With a side tab filing system, you can go as high as seven levels, almost doubling your capacity. Then you can use color coding and other types of visual aids to locate files quickly.

TAB staff then printed the labels and transferred documents from the top tab manila folders to side-tab FORTIfile folders.

Using this method TAB converted all the files – on all three floors – in the old building. These files were then moved by TAB personnel to the new building, where they were consolidated into the central file rooms containing the new mobile and static filing system.

*“Having TAB come in and perform the file conversion and the move was a godsend. If we had chosen to do it ourselves, we would surely have had downtime before, during and after the move.”*

## Zero Downtime, Full Access

The TAB team arrived at U. S. Epperson Underwriting Company's old offices on a Monday, four days before the scheduled moving day. Within three days, they had populated the TABQUIK database, produced new labels, and converted all the files from top-tab to side-tab folders.

On Thursday, the TAB team began moving files to the new building. By early afternoon Friday, all the files were on the new shelves, ready for use the following business day, exactly as Girten and his team had estimated in their proposal.

“By deadline day, they had re-tabbed all the new files, and put everything into new jackets with the labels on the side,” the purchasing manager said. “It was all done in a very organized way.”

In fact, TAB was so organized that anyone at U. S. Epperson Underwriting Co. who needed to access the files could do so straight away.

As the purchasing manager puts it, “we never had downtime because if we had to, we could find files at any moment. Having TAB come in and perform the file conversion and the move was a godsend. If we had chosen to do it ourselves, we would surely have had downtime before, during and after the move.”

TAB remains proud of helping U.S. Epperson Underwriting Co. get the maximally efficient central filing system they needed, when they needed it!



**Top:** TAB Miami Sales Manager Paul Girten worked with Joyce Robertson, CPU Manager, to complete the file move and folder conversion smoothly and quickly

**Above:** The installation of three new mobile systems allowed space for all of U.S. Epperson Underwriting's records to be stored in one central filing room

### *Anatomy of an effective solution*

To address the file conversion, consolidation and relocation challenges at U.S. Epperson Underwriting, TAB provided the following products and services:

- TABQUIK™ software
- FORTIfile™ folders
- TAB-TRAC™ and L&T shelving
- Installation of new filing system
- Data entry of label information
- File conversion from top-tab to side-tab folders
- File consolidation
- File relocation from one building to another



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