CROWLEY
DIGITIZATION SERVICES

MICROFILM DIGITIZATION PROJECT ENHANCES PRIMERICA® EFFICIENCY, CUSTOMER SERVICE

Onsite scanning of 60,000+ microfilm reels adds layer of secure records accessibility

Five years ago, The Crowley Company (Crowley) was contacted by Primerica, a leading provider of financial services to middle-income households in the United States and Canada, to discuss the backfile conversion of their insurance policy microfilm collection.

At the time, the process to retrieve insurance records was – like that of most financial and insurance firms – enormously time consuming. Simplified, the process included:

1. Receiving an **internal request** for a specific insurance record
2. Having personnel **locate the correct microfilm** roll
3. Taking the roll to a **microfilm reader**
4. **Loading** the roll on a microfilm reader
5. **Searching** the roll for the correct document
6. **Printing** the record (for a physical copy)
7. **Unloading** the microfilm roll
8. **Replacing** the roll
9. **Returning** the roll to its correct location
10. **Electronically sending** the record to the requestor

This process was repeated hour after hour, day after day by a dedicated records management retrieval staff which fielded hundreds of requests each day from dozens of departments across the corporate campus.

Misty Sutton, Senior Vice President of Primerica Life Insurance for Business Relationship Management, estimates that **in 2016 an average record retrieval took approximately 15 minutes** from start to finish. **Today, a Primerica insurance record retrieval takes seconds thanks to the firm's investment in the digitization of their microfilm archives**.

Six Mekel Technology microfilm scanners, such as those pictured in this Crowley training session, were used to scan more than 60,000 rolls of microfilm in eleven months

This leap in efficiency has had multiple benefits for both Primerica and its clientele:

*   Increased **user satisfaction** due to quicker request turnaround
*   Increased **staff productivity** and job satisfaction
*   **Reduced wear and tear** on, and physical handling of, aging microfilm
*   A **secure duplicate** set of policy records

LEARNING CURVES

All told, the Primerica archives hold 60,000+ rolls of microfilm containing active policies. Most reels in the collection are 16 mm, 215' rolls of blipped microfilm (a "blip" is an information marker or markers used to help identify the location of a file on a roll of microfilm).

To learn more about digital options, Sutton turned to Crowley for a collection assessment. As a scanner manufacturer, distributor and a digitization services bureau, Crowley's unique position in the market allows for multiple solution options. These ranged from Primerica scanning the collection themselves to a completely outsourced scanning alternative.

Initially, Primerica opted to purchase a mix of on-demand and production microfilm scanners from Crowley that would enable their staff to digitize reels for online data storage while still allowing for daily record pulls. By October, the Primerica team was trained and splitting efforts between digitization for the long term while meeting daily records requests.

Three years later, Sutton contacted Crowley again, unsatisfied with the lack of progress on the backfile digitization due to various workflow challenges with the film. While working together on a proposal to outsource the digitization to Crowley's service division, a technician from Crowley's technical support department traveled to Atlanta to retrain staff on how to maximize efficiency from their Mekel Technology MACH 10 scanner – boosting production from ten rolls a day to ten rolls an hour. This not only helped to build trust, but also showed how a cadre of well-versed operators on multiple Mekel scanners could make short work of the microfilm backfile.

Following collaboration between Crowley and Primerica to establish best practices for both efficiency and records security, it was decided that Crowley's digitization services would mobilize and supervise scanning operations at one of Primerica's Atlanta, Georgia locations.

SECURELY ON SITE AND ON TRACK

Moving quickly, five Mekel MACH 10 scanners powered by QuantumScan software were shipped from Crowley's San Dimas, California manufacturing facility. The scanners were calibrated and set-up by Crowley field technicians on location and three local staff were hired and trained by Crowley as scan operators. An experienced Crowley project manager was transferred to Atlanta for the duration of the contract to oversee daily operations. Incorporating Primerica's own MACH 10, the total scanner count was six.

Having started with a contract to scan and process 21,000 microfilm rolls in ten weeks, the total was pushed to 30,000 rolls once the team had proven the ability to exceed the expected production goals. To maintain maximum security, the microfilm images were scanned to Apricorn Aegis encrypted portable hard drives with keypad authentication security (codes created by Primerica). Per Primerica specifications, all images were scanned as bitonal TIFF images at 200 dpi directly to the encrypted drives. From there, the images were processed by a separate team utilizing Mekel Technology's QuantumProcess software. Processing included splitting the blips to match Primerica's recordkeeping at an average rate of 12,500,000 image per week.

Once processed, the images/records were output to an additional secured, encrypted drive, ensuring that no one other than an authorized Primerica employee had access to any of the images or files.

Upon final approval of the images by Primerica staff, the digitized microfilm data was uploaded into Primerica's existing electronic content management system (ECM), IBM Content Manager.

In addition to the challenges of mobilizing on-site and scanning a high volume of microfilm reels on a condensed schedule, specific attention was paid to:

- **Scanning a collection that was a combination of simplex, duplex and propagation microfilm reels**. This required a microfilm scanner/software combination that could easily read and capture multiple formats of microfilm as well as scan operators with the technical expertise to manipulate the scanner settings to maximize image quality based on the type of roll being scanned.

- **Adding a blip** to the target image of each roll when necessary to ensure images were included in the verification of indexes provided by Primerica

- **Adding microfilm leaders and trailers** as needed

- **Accommodating daily record pulls** while scanning active record files. As needed, Primerica staff would pull reels from the daily scanning workflow to allow for timely record request fulfillment. Once the record was downloaded using a reader printer, the reel was put back into the workflow. This required constant coordination between the records management and the scanning staff.

DIGITIZING NOW TO ENSURE THE FUTURE

Following the successful completion of the first phase of the microfilm digitization project, Primerica granted Crowley a second phase for the digitization of 30,000+ rolls to be completed in a five-month period. Delayed by, and then scanned and processed safely during, the height of the COVID-19 epidemic, the ability to have these records online and securely accessible has taken on even greater importance as Primerica serves its clients remotely.

> Having the ability to access a microfilm backfile of this size digitally has made a significant impact on how we can conduct business and service our clients and representatives. While our direction changed from the initial intent to scan in-house, Crowley persevered to prove their capacity to help Primerica achieve its goal of getting more than 60,000+ rolls of microfilm records online in less than 18 months, including a seven-month break.
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> Ultimately it wasn't just one Crowley division that provided a solution, it was their unique combination of scanning hardware, technical support and digitization services that enabled Primerica to succeed with this portion of our long-term digitization plan.

~ Misty Sutton, Senior Vice President of Primerica Life Insurance for Business Relationship Management

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